



eFinancePlus Managed Services Statement of Work



PowerSchool

 Personalized Education
for Every Journey

Service: eFinancePlus Application Managed Service

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This edition applies to Release 23.10 of the ERP software and all subsequent releases and modifications until otherwise indicated in new editions or updates.

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This Statement of Work (“SOW”) for Professional Services is entered into and between **PowerSchool Group LLC (“PowerSchool”)** and **Customer**. This SOW is not a software subscription agreement, nor does it provide Customer with licenses to any PowerSchool application which requires a separately executed Master Services Agreement (“MSA”) and PowerSchool Quote. This SOW is issued pursuant to the Professional Services terms and conditions incorporated into the MSA entered by and between PowerSchool and Customer.

“**Project**” refers to the scope of services, including the performance of all work, activities, and deliverables, set forth in this SOW. Appendices are hereby included in this SOW. Notwithstanding any other provision of these terms, the timeline contained in this SOW shall be regarded only as an estimate.

“**Professional Services**” as used herein means Professional Services work rendered by PowerSchool in relation to this SOW. It is distinguished from the meaning of “Service” as used in the MSA.

1. SCOPE OF WORK

This section defines the scope of the Professional Services to be delivered by PowerSchool with support from Customer resources under this SOW. If changes or expanded scope are necessary, the parties shall follow the **Project Change Request (“PCR”)** procedure. Upon investigation of changes, the SOW may result in modifications to the Estimated Schedule, Fees, or other terms of this SOW. PCR terms are defined in section 6.

1.2 Understanding of Objectives

The purpose of this SOW is to outline and specify the services and support provided by PowerSchool Professional Services in the fulfillment of the Application Management Service (“AMS”) and address the roles and responsibilities of PowerSchool and the school, district, or other entity subscribing to AMS.

AMS is a comprehensive solution that manages and maintains the Customer’s Enterprise Resource Program (ERP) in the following areas:

- Kick-off and Communication Planning
- Software Best Practices
- Support Case and Enhancement Requests
- Compliance/State Reporting Guidance
- Annual and Cyclical Activities
- Business Practice Optimization
- Application Upgrade Support
- Dashboards and Standard Reporting
- How To Questions

1.3 Organizational Information

The following organizations are in scope:

- 1 Organization
- 1 Language (English)
- 1 Currency (USD)

The Project will be executed through the following mediums:

- Remote Services
 - All services will be rendered through secure remote access or web-based meetings.

1.4 Location

The Project will be located at the following locations:

- Remote
- Onsite (by customer requests only and agreed upon by AMS Advisor, travel expenses billed as incurred)

1.5 ERP Applications

The following PowerSchool software application(s) and subsequent modules will be part of the Services outlined in this statement of work.

- ☐ PowerSchool ERP
- ☒ eFinancePlus
- ☐ Atrieve
- ☒ Applicant Tracking Integration
- ☒ Records Integration
- ☒ SmartFind Express Integration

1.6 Customer Environments

The following PowerSchool software application(s) and subsequent modules will be part of the Services outlined in this statement of work.

- ☒ Hosted
- ☐ On Premise

1.7 Hardware/Network Support

The management, maintenance, troubleshooting, etc. of the district's on-premises servers that house the applications for this statement of work are NOT included in this SOW. This also excludes Customer created SQL scripts, ODBC manipulation, server automation routines, secure file transfer protocols (SFTP) outside of the application, operating system upgrades and windows server maintenance.

1.8 AMS Advisor On-Premise Access

The district agrees to provide full and secure access to the application and database for the AMS Advisor to perform and render services promptly. PowerSchool provides tools and strategies for secure access that allows access and permissions to be controlled by the customer.

1.9 Roles & Ownership

The bullets below outline the roles, responsibilities, and ownership for this agreement.

- **AMS Manager:** Manage the priorities/activities & interactions for each client.
- **AMS Advisor:** Completing assignments defined by the PM, including all consulting sessions/BPR. Provide guidance to district on ERP system as needed.
- **District AMS Contact:** Responsible for managing the ERP system to include but not limited to financial operations, employee information, benefits, attendance, and payroll. Manage district resources & complete required tasks assigned by PS including creating support cases to be opened under advisement of the ERP AMS team.

2. SCOPE OF SERVICE

A PowerSchool AMS Manager & Advisor will be assigned to the district. The AMS Manager will be the Customer's primary point of contact for activities identified in this statement of work. The following activities included in this service:

2.2 Kickoff & Communication Plan

- Schedule meeting(s) to discuss roll-out of AMS activities and scheduling.
- Identify communication plans for leadership and staff.
- Develop and provide access to project reporting collateral.
- Establish status meeting cadence for Customer and PowerSchool management teams.

2.3 Business Process Optimization

A key component of the AMS offering is to provide continuous process improvement activities during the term of this SOW. Services provided will include:

1. Business Process Review (BPR) – a formal and comprehensive review of the Customer’s current ERP business practices and includes:
 - 1.1. One (1) Business Process Review is included in the term of this Statement of Work.
 - 1.2. Customer and AMS Manager to identify time and scheduling for BPR activities.
 - 1.3. Customer to inform and identify staff to participate in the workshops.
 - 1.4. PowerSchool will complete the following:
 - 1.4.1. Staff Survey and report
 - 1.4.2. Workshops that cover Finance/Budget, Purchasing, Personnel/Applicant, Payroll/Timesheet, and IT/Technical.
 - 1.4.3. A final report that includes summary overview and recommendations.

Exclusion(s):

- Business process review recommendations for consulting and training activities are not included as part of AMS.
- Implementation of new modules.

2. Advisement and planning activities for released system enhancements. This can include testing procedures, checklists, consultation, and other support.
3. Establishment of regularly scheduled “Open Office Hours” to provide guidance on application configuration and processes, forms, workflows, and “how-to” questions for modules currently used.
 - Customer and AMS Manager to coordinate meeting cadence.
 - AMS Manager to schedule sessions.
 - Customer to identify process and staff to participate in sessions.
 - AMS Advisor to provide troubleshooting and resolution expertise.
 - AMS Advisor, at their discretion, may include an Application Consultant to assist with sessions.
 - Upon completion of training activities for new module implementation (see Exclusions), module(s) will be covered under this SOW.
 - AMS Advisor will provide an email address to the client.
 - Customer will determine which staff will have access to AMS Advisor email address.

Exclusions:

- Training for module(s) not currently used by Customer at the time of the signing of this SOW.
- Refresher training activities for new hires or existing staff.
- Staff augmentation activities – performing duties handled by district staff.
- Implementations projects are not included in this SOW.
- CSAT or escalations directly related to an ongoing implementation

2.4 Support Cases & Enhancements

Proper management of support case priorities, issue identification, and enhancement requests is critical to customer operations. Services provided will include:

- AMS Manager will act as a “first point of contact” for potential issues prior to Customer staff submitting support case(s).
 - AMS Manager will inform the Customer to submit a support case, if needed.
 - The Customer is responsible for submitting the case to ensure proper communication channels are followed to resolve the issue and case will indicate previous communication with AMS Advisor.
- The AMS Advisor will advocate, communicate, prioritize, and assist with communications between the Customer and PowerSchool support staff for all open support case activities.
- The AMS Advisor will provide regular updates on open support case status.
- The AMS Advisor will provide guidance to the Customer for submission of product enhancement requests.

Exclusion(s):

- Active support cases will not be resolved by the AMS Advisor. This will be handled by the PowerSchool Support team.

2.5 Release Upgrade Support

To stay current on major feature releases and ensure that Customer complies with PowerSchool's N-1 policy for software versioning and support. Services to be provided:

- The AMS Manager and Customer will identify time and scheduling for upgrade activities.
- Customer to inform and identify staff to participate in the upgrade activities.
- Tasks to be completed for the upgrade:
 - Project Plan and management of upgrade tasks.
 - Test environment setup.
 - Support of testing activities.
 - Production turnover activities including production updates and overview sessions.

Exclusion(s):

- Costs for custom retrofits created by PowerSchool for the Customer.
- Costs for custom retrofits and support for Customer created and implemented customizations (SQL, APIs, code modification, etc.).
- Technical services not within scope of SaaS (Software as a Service) or hosting MSA agreements.

2.6 Cognos Dashboards & Reporting

Accessing and understanding a Customer's business data is critical to understanding an organization's business health and operational efficiencies. PowerSchool AMS will provide reporting and dashboard services as part of the Application Managed Service.

- Installation of Cognos Dashboards and Report package (if not previously installed).
 - Includes Persona-based dashboards for Superintendent, Chief Financial Officer, Purchasing Director, Human Resources Director, and Payroll Manager
 - Includes reports for Accounting, Budget, Purchasing, Human Resources, and Payroll.
- Customer and AMS Manager to identify time and scheduling for installation activities.
- Customer and AMS Advisor to identify requirements for updates to dashboards and reports.

Exclusion(s):

- Customer-specific Cognos report development
- Signatory of compliance data accuracy.
- Creation of new state reports by the AMS team.

2.7 Compliance & State Reporting

Partner with client on having a quarterly state compliance meeting.

Exclusion(s):

- Submission of annual, quarterly, and monthly federal, state, and local compliance reports.
- Signatory of compliance data accuracy.

2.8 Seasonal & Cyclical Training

Online access to materials to support the Customer with proper management of system data and software processes that typically occur on an annual cycle will be provided.

- AMS Advisor will provide access to the online materials.
- Application consultants will provide office hours to support the online materials and questions from the Customer's staff.

Exclusion(s):

- Customer Education Exclusive/Monthly Training Seminars Offerings
- Customer Education for 1:1 Training requests
- Customer Education Training Bootcamps

3. HOW TO CONTACT APPLICATION MANAGED SERVICES

AMS has established a process for AMS Customers to use to ensure a timely response to AMS support and service requests. When the Customer contacts PowerSchool AMS, an AMS Representative, AMS Advisor or Technical Specialist will be assigned to assist the Customer with the request. The AMS representative will have access to documentation capturing the technical information related to the Customer's ERP environment and an archive of previous AMS support issues and requests.

The two primary methods for requesting service or support are indicated below. AMS provides a 24hour Service Level Agreement for responding to correspondence directed to either of the following:

Email

To receive support or request services by email, the Customer should direct their requests to your AMS Advisor directly.

Telephone

To receive support or request services by telephone, the Customer may contact their AMS Advisor directly during normal business hours.

4. CUSTOMER ESCALATION PROCEDURE**4.2 Escalation**

If Professional Services cannot provide resolution or indicate the appropriate path to resolution within two (2) business days from receipt of the request, the Customer's Primary Contact can contact Professional Services management directly at amsmanagement@powerschool.com via email with the details of the situation and desired escalation.

5. EXPENSES**5.2 Onsite Travel Expenses**

Customer choosing to engage in onsite engagements will be invoiced separately for travel expenses incurred monthly. Payment is due 30 days from invoice. Invoices will be sent to the Customer via electronic mail. Travel expenses are not included in the hourly rate, unless specifically stated within the statement of work.

6. PROJECT CHANGE REQUESTS

The following process will be followed in cases of change to Project scope, budget, or timeline:

- A **Project Change Request ("PCR")** form will be the vehicle for communicating change. The PCR must describe the change, the rationale for the change, and the effect the change will have on the Project.
- The designated Project Manager of the requesting party will submit the request to the other party.
- All Project Managers will review the proposed change and approve it or reject it.
- The PowerSchool Project Manager and Client Project manager must sign a PCR form to authorize implementation and invoicing of the changes.

The following is an example template:

6.2 Sample PCR Template

Customer Name:	Date Requested:
Change Order #:	PowerSchool EM:
Project Name:	Project Sponsor:

Change Order Value:		Billing Type:
Estimated Fees:	\$	
Estimated Expenses:	\$	Type of Change:
Estimated Total:	\$	Scope? Schedule? Both?

Hourly Rate:

The Professional Services will be delivered on a Time & Materials basis. Customer will be billed \$xxx per hour starting with the first monthly invoice and up to a maximum of xxx hours. Any additional hours will require a new Change Order.

Description of Change Requested:**Reason for Change:****Proposed Approach to Resolve:**

Impact on Scope	Impact on Proposed Changes:
Impact on Scope Risk	
Impact on Schedule	
Approvals to Proceed:	
Customer:	PowerSchool Corporation
Signature:	Signature:
Date:	Date:

7. GENERAL ASSUMPTIONS

The following procedures will be followed for the performance of this SOW.

1. If onsite engagements occur, PowerSchool will have space to work at the Customer offices as required during this strategic project.
2. All Customer personnel who need to be involved in this project will be sufficiently knowledgeable about their business area's needs and have the authority to represent their business area.
3. All Customer personnel who need to be involved in this project will be available and responsive in a timely manner, so as not to delay the project's schedule.
4. Unless otherwise noted or specifically identified within the contract, all customizations, enhancements, forms, reports, etc. not contained within the base package are considered out of scope and will follow the Project Change Control Procedure.
5. All sign offs must be done by an employee and designated signatory of the Customer. Third-party entities engaged by the Customer are not acceptable signatories for any project sign offs.

6. Customers will provide PowerSchool with remote access to the system for AMS Services, as required.
7. The PowerSchool AMS Advisor will point the Customer to available procedures, guidelines, standards, reference materials and system/application documentation.