The Power User's Playbook:

Custom Workflows and Reporting that Drive Results

ADVANCED SKYWARD Q CUSTOMIZATION

DOVER AREA SCHOOL DISTRICT

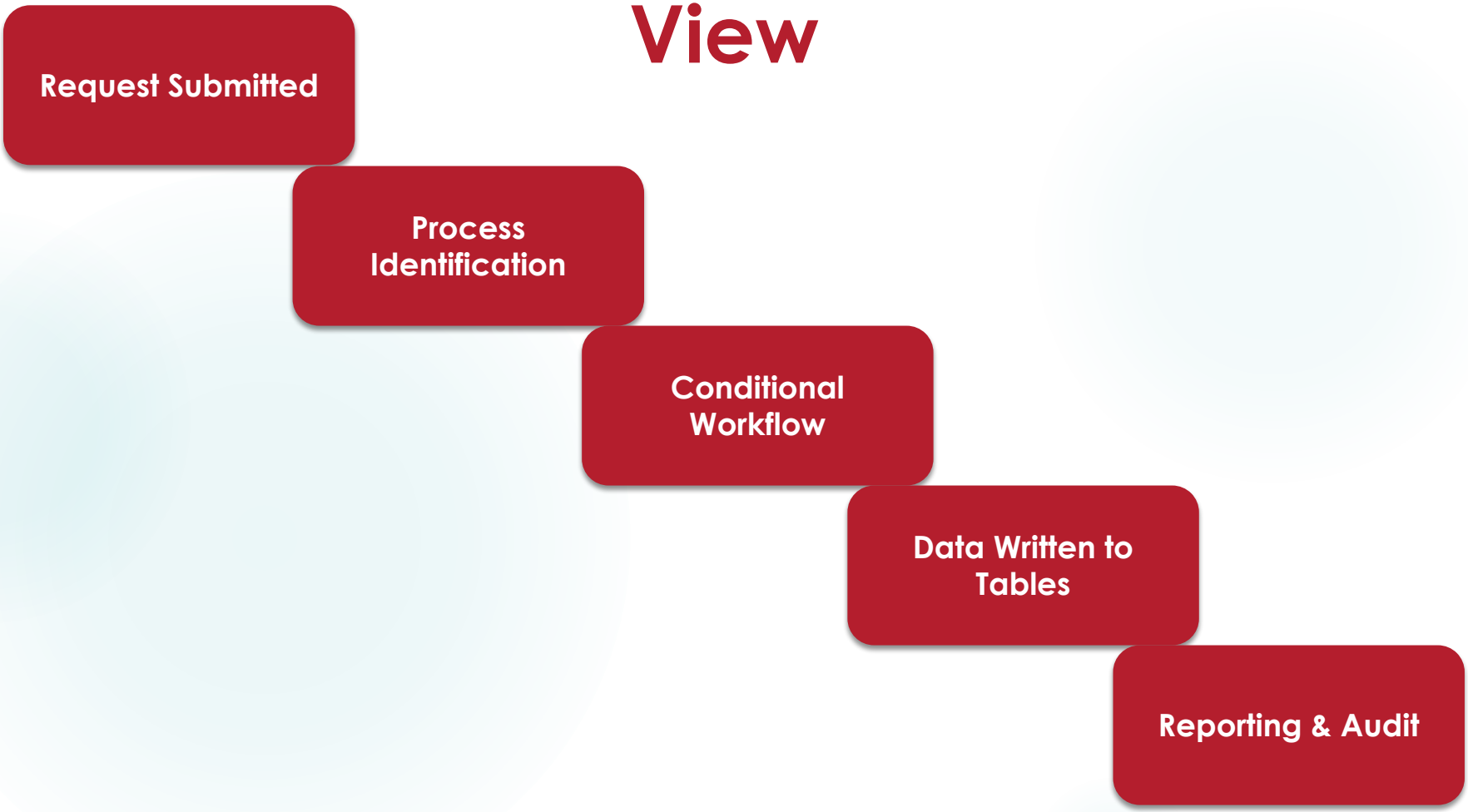
District Bio

- Serves a **42-square-mile** area in **York County, Pennsylvania**
- Supports a community of approximately **24,000 residents**
- Educates **3,200+ students** in grades **K–12**
- Employs nearly **500 staff members**
- Operates:
  - **-1 High School** (Grades 9–12)
  - **-1 Middle School** (Grades 6–8)
  - **-4 Elementary Schools** (Grades K–5)

Session Overview

- Move beyond basic Skyward Q usage
- Design custom workflows that streamline operations
- Build reports
- Learn from real-world district scenarios
    - Q and A

Custom Workflow – Horizontal View



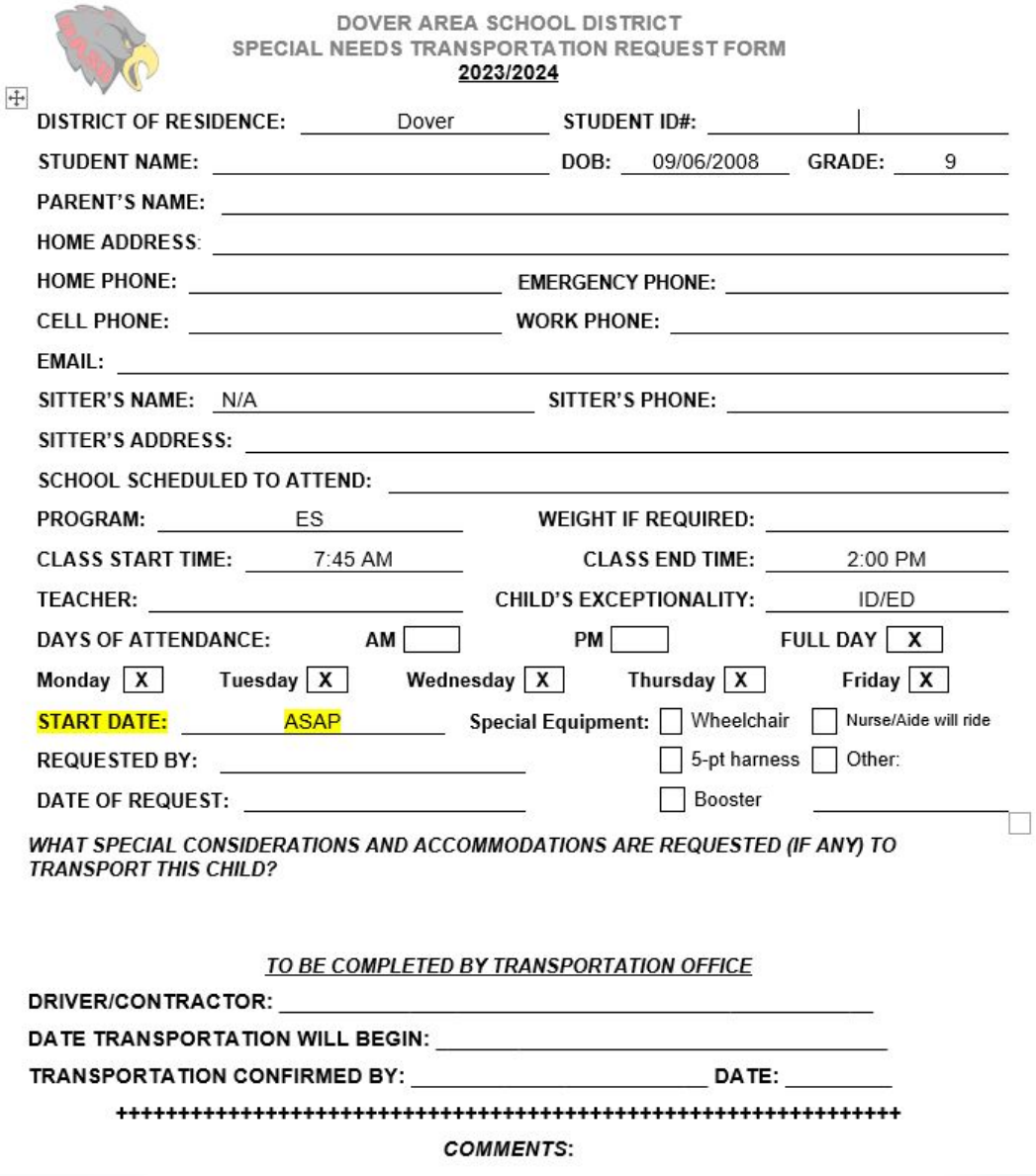
Why Power Users Matter

- District efficiency depends on smart system design
- Manual processes increase errors and slow teams down
- Power users turn Skyward into a strategic tool
- Well-designed workflows scale across departments

Understanding Custom Workflows in Skyward Q

- Automate multi-step processes
- Reduce duplicate data entry
- Ensure consistent approvals and validations
- Improve transparency and accountability

District Workflow Identified



DOVER AREA SCHOOL DISTRICT
SPECIAL NEEDS TRANSPORTATION REQUEST FORM
2023/2024

DISTRICT OF RESIDENCE: Dover STUDENT ID#: _____

STUDENT NAME: _____ DOB: 09/06/2008 GRADE: 9

PARENT'S NAME: _____

HOME ADDRESS: _____

HOME PHONE: _____ EMERGENCY PHONE: _____

CELL PHONE: _____ WORK PHONE: _____

EMAIL: _____

SITTER'S NAME: N/A SITTER'S PHONE: _____

SITTER'S ADDRESS: _____

SCHOOL SCHEDULED TO ATTEND: _____

PROGRAM: ES WEIGHT IF REQUIRED: _____

CLASS START TIME: 7:45 AM CLASS END TIME: 2:00 PM

TEACHER: _____ CHILD'S EXCEPTIONALITY: ID/ED

DAYS OF ATTENDANCE: AM [ ] PM [ ] FULL DAY [X]

Monday [X] Tuesday [X] Wednesday [X] Thursday [X] Friday [X]

START DATE: ASAP Special Equipment: [ ] Wheelchair [ ] Nurse/Aide will ride

REQUESTED BY: _____ [ ] 5-pt harness [ ] Other:

DATE OF REQUEST: _____ [ ] Booster _____

WHAT SPECIAL CONSIDERATIONS AND ACCOMMODATIONS ARE REQUESTED (IF ANY) TO TRANSPORT THIS CHILD?

TO BE COMPLETED BY TRANSPORTATION OFFICE

DRIVER/CONTRACTOR: _____

DATE TRANSPORTATION WILL BEGIN: _____

TRANSPORTATION CONFIRMED BY: _____ DATE: _____

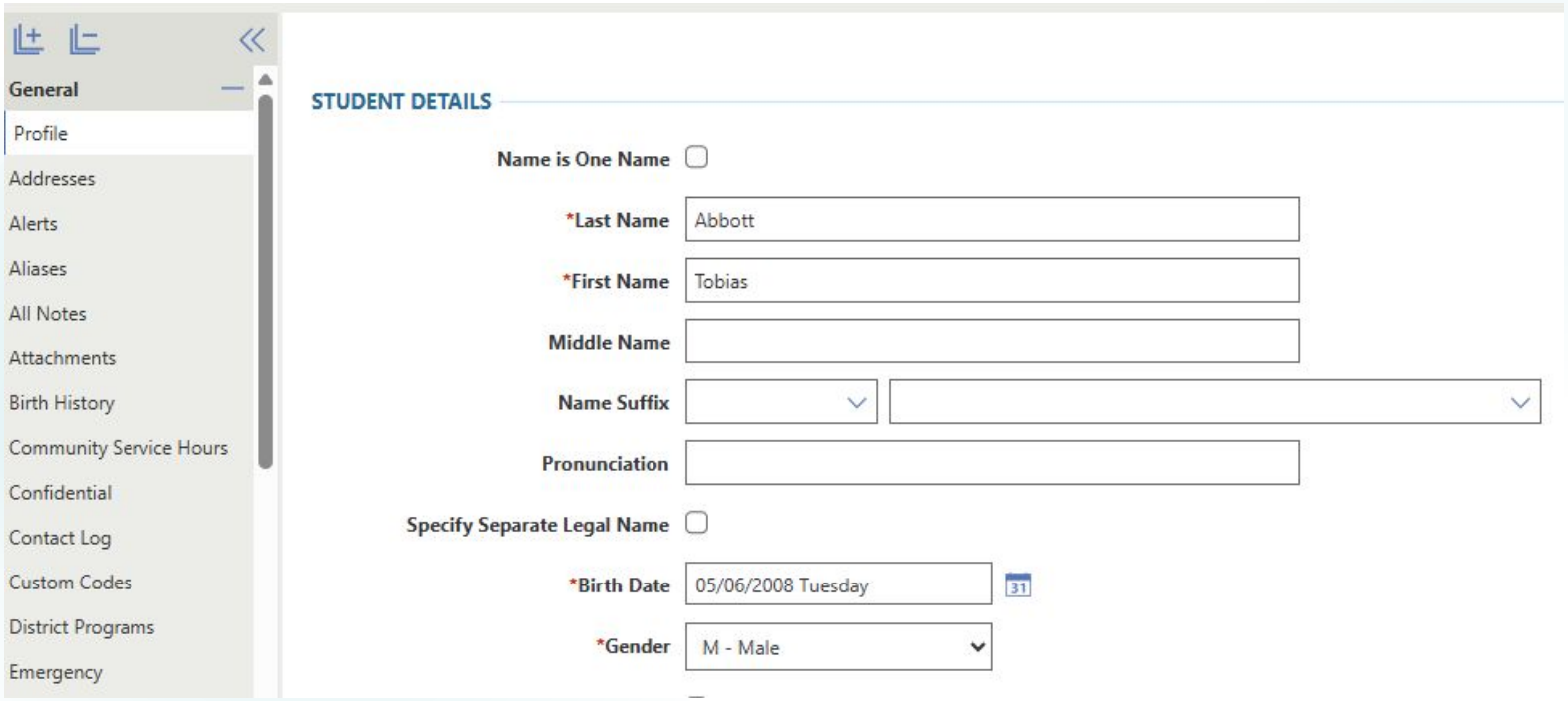
++

COMMENTS:

Data Relationships

1:1 Relationship

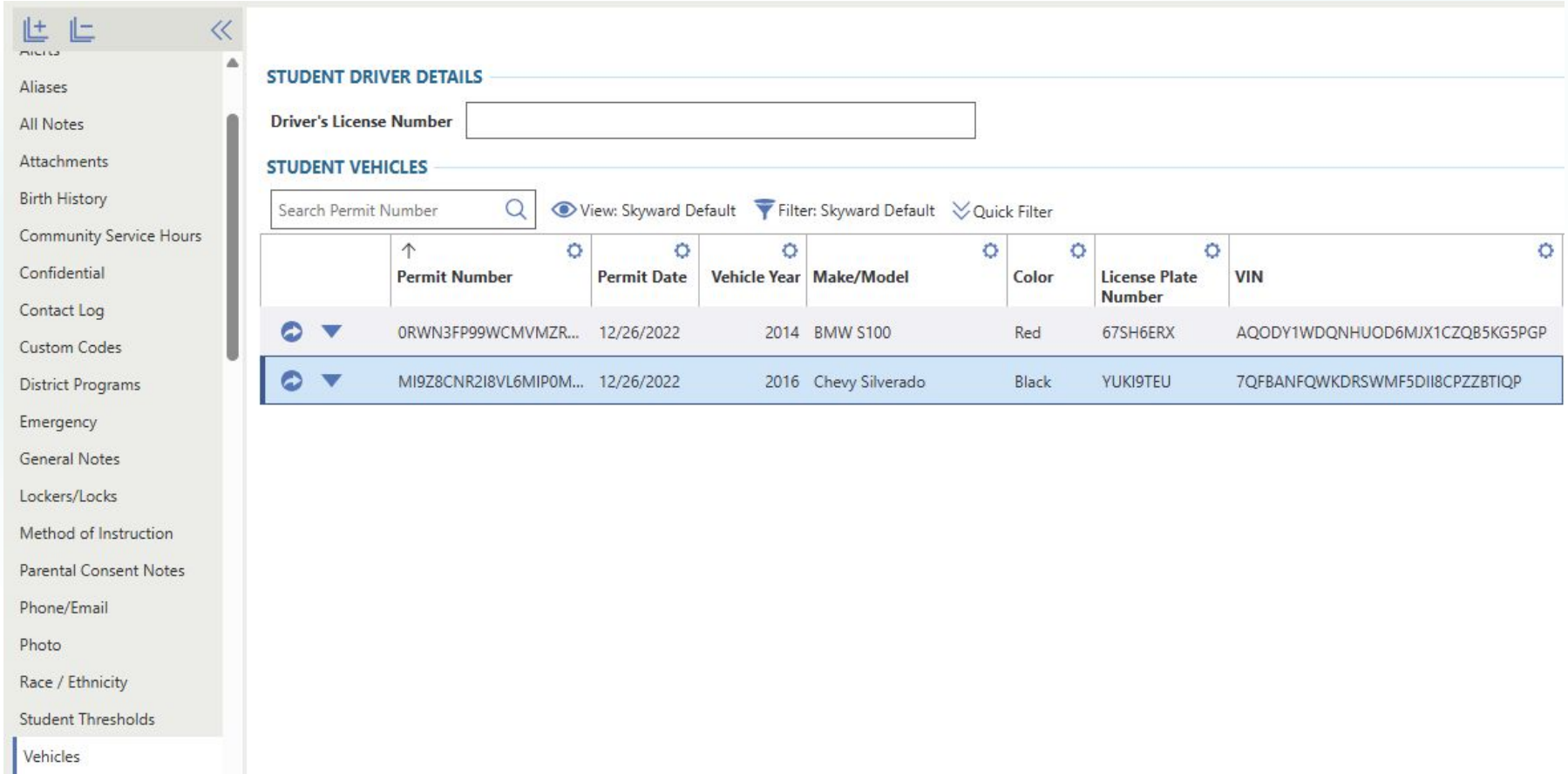
Student → Single Field



Data Relationships (cont.)

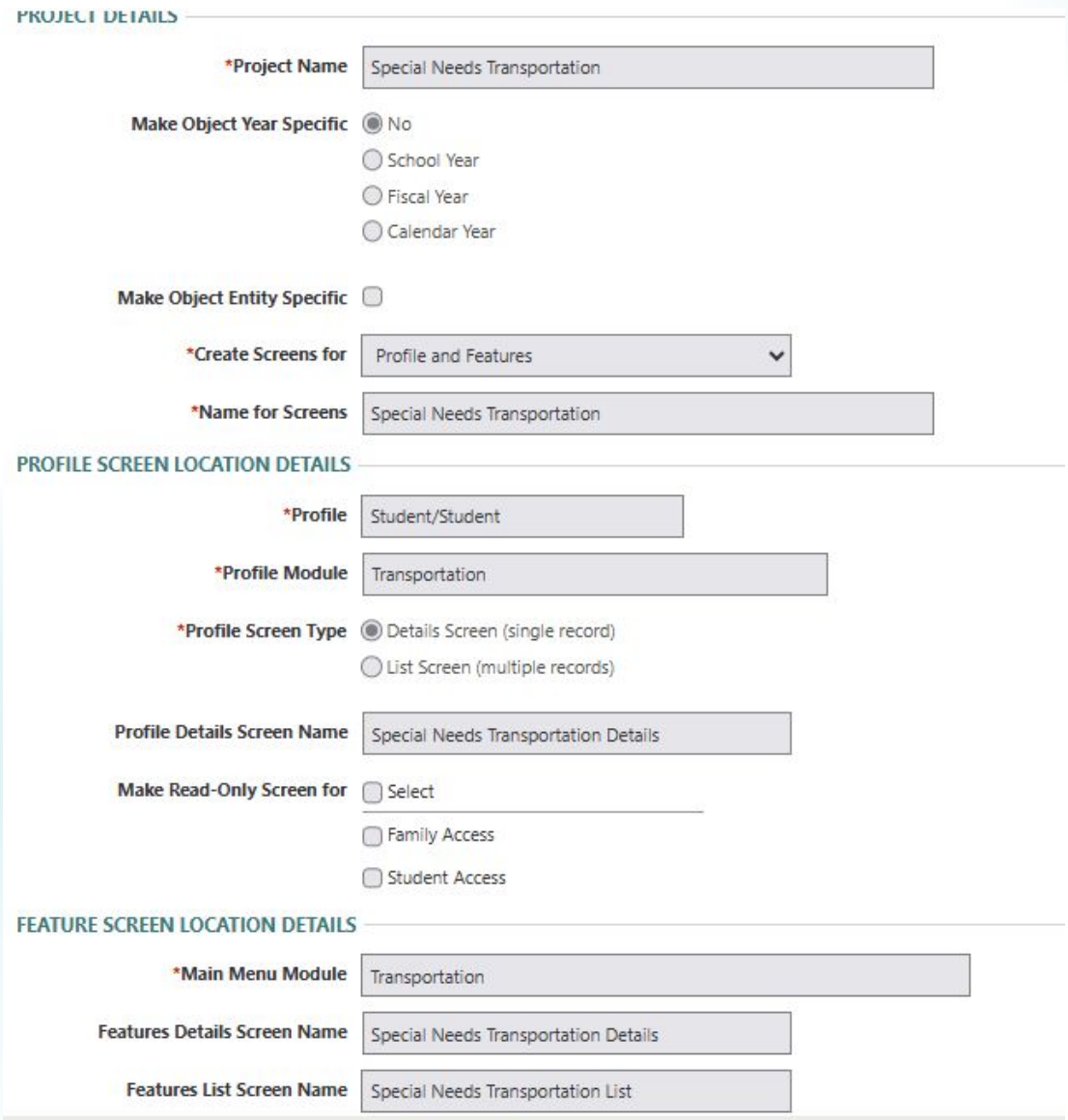
- **1:Many Relationship**

Student → Repeating Records



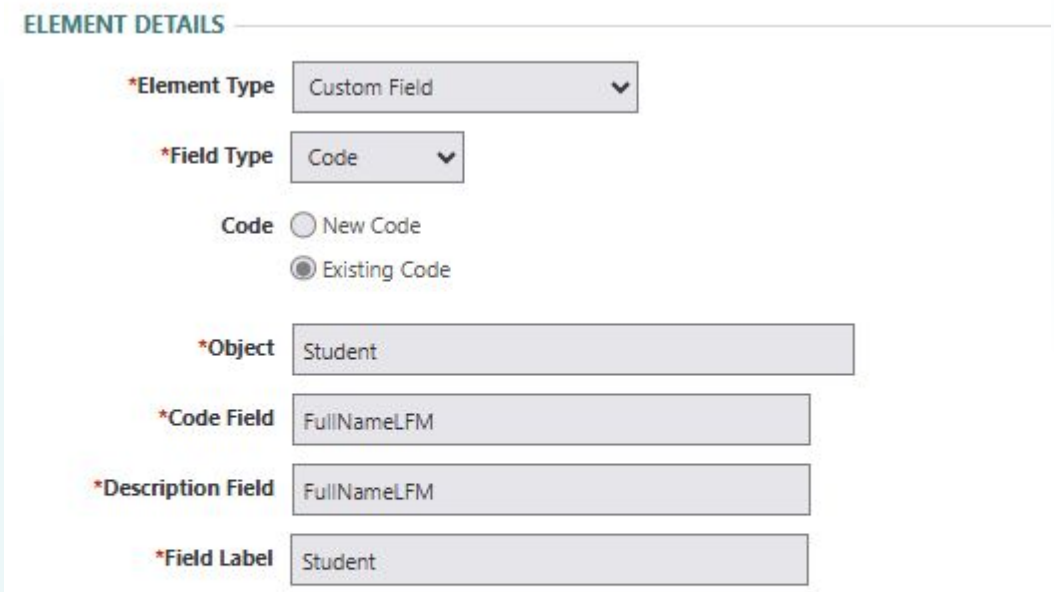
Determine Data

Element Type	Field Label	Field Type	Source	Element Detail	Code Type	
Custom Field	Student	Code	Student.Student			
Custom Field	School Code	Text				
Custom Field	School	Code	School		Existing Code	
Custom Field	Program Code	Text				
Custom Field	Program	Code	Program		Existing Code	
Custom Field	Weight in lbs	Integer				
Custom Field	Class Start Time	Time				
Custom Field	Class End Time	Time				
Custom Field	Child Exceptionality Code	Text				
Custom Field	Child Exceptionality	Code	ChildExceptionality		Existing Code	
Custom Field	Time of Day Transport Code	Text				
Custom Field	Time of Day Transport	Code	TimeOfDayTransport		Existing Code	
Custom Field	MON	Checkbox				
Custom Field	TUES	Checkbox				
Custom Field	WED	Checkbox				
Custom Field	THURS	Checkbox				
Custom Field	FRI	Checkbox				
Custom Field	Start Date	Date				
Custom Field	Wheelchair	Checkbox				
Custom Field	Car Seat	Checkbox				
Custom Field	Seat Belt Lock	Checkbox				
Custom Field	Booster Seat	Checkbox				
Custom Field	Other	Text				
Custom Field	Date of Request	Date				
Custom Field	Requested By	Text				
Custom Field	Accommodations Needed	Text				
Custom Field	Initial Revision Code	Text				
Custom Field	Initial-Revision	Code	InitialRevision		Existing Code	

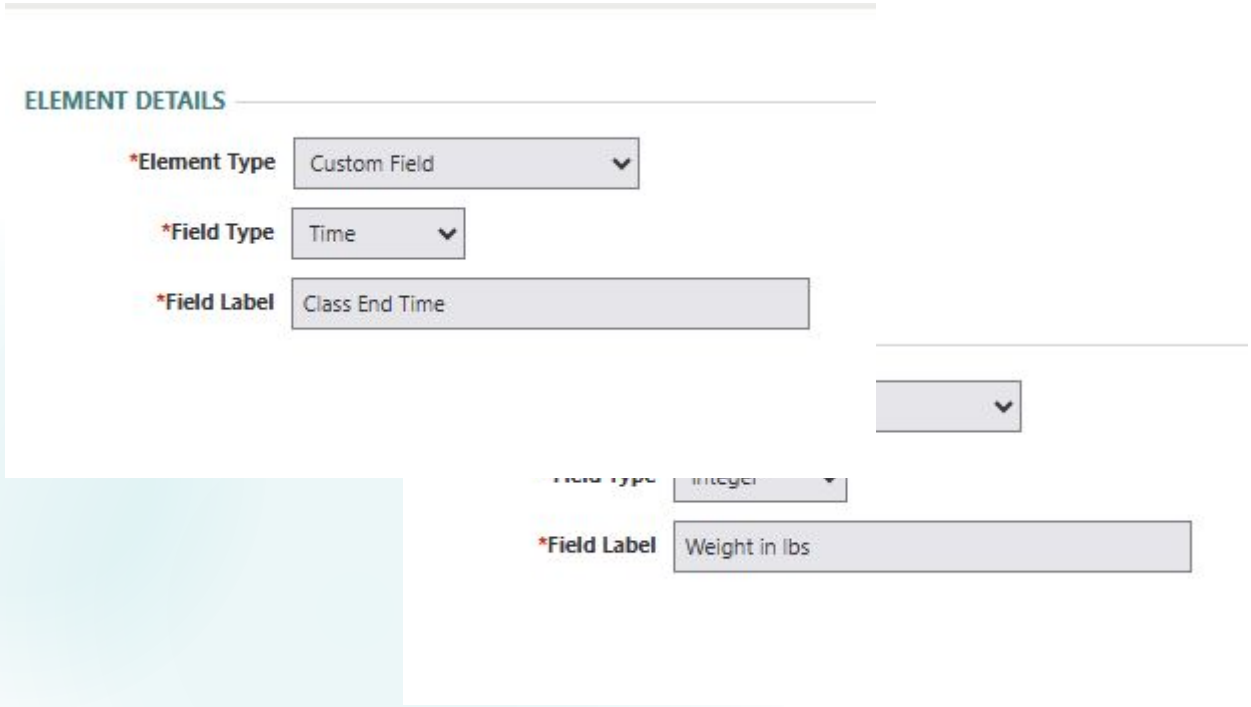


Start the Project

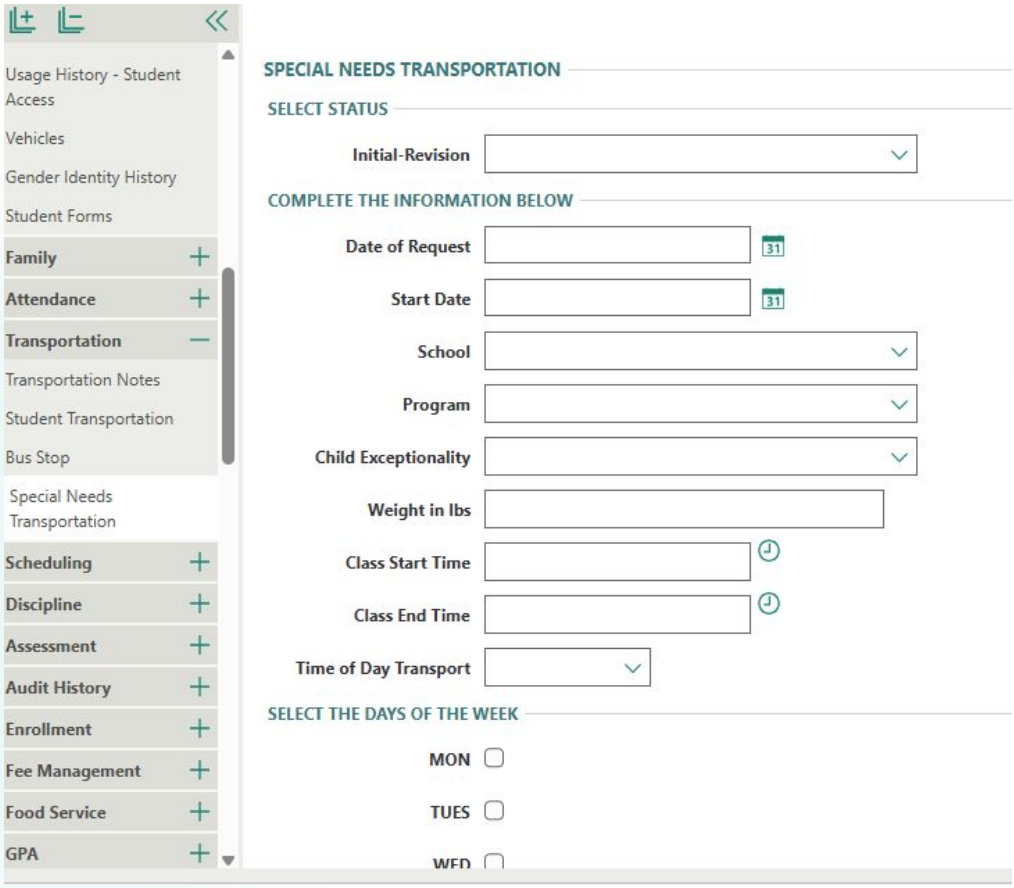
Utilize Existing Code Tables



Create new code tables



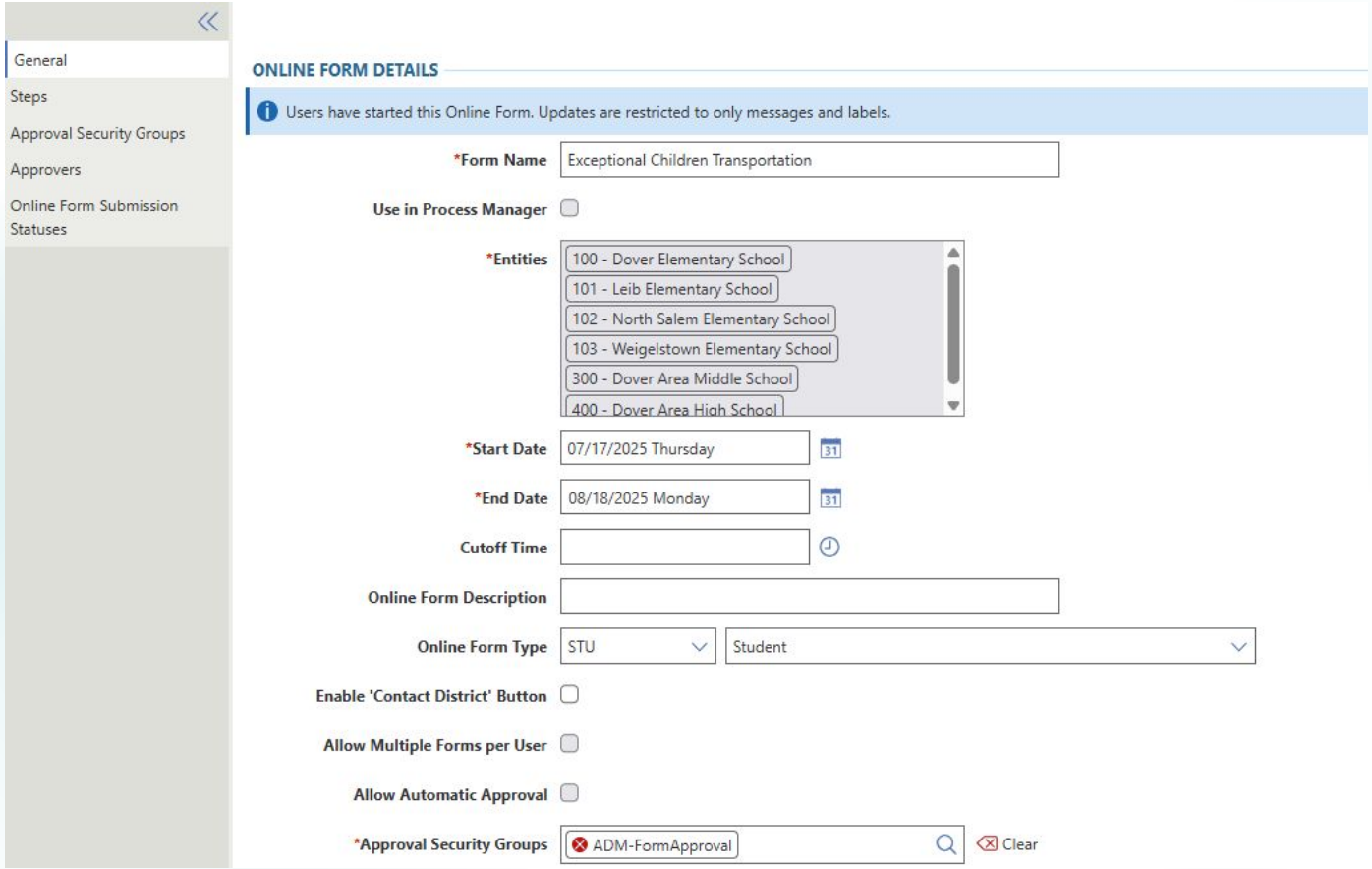
Viewing the Customization



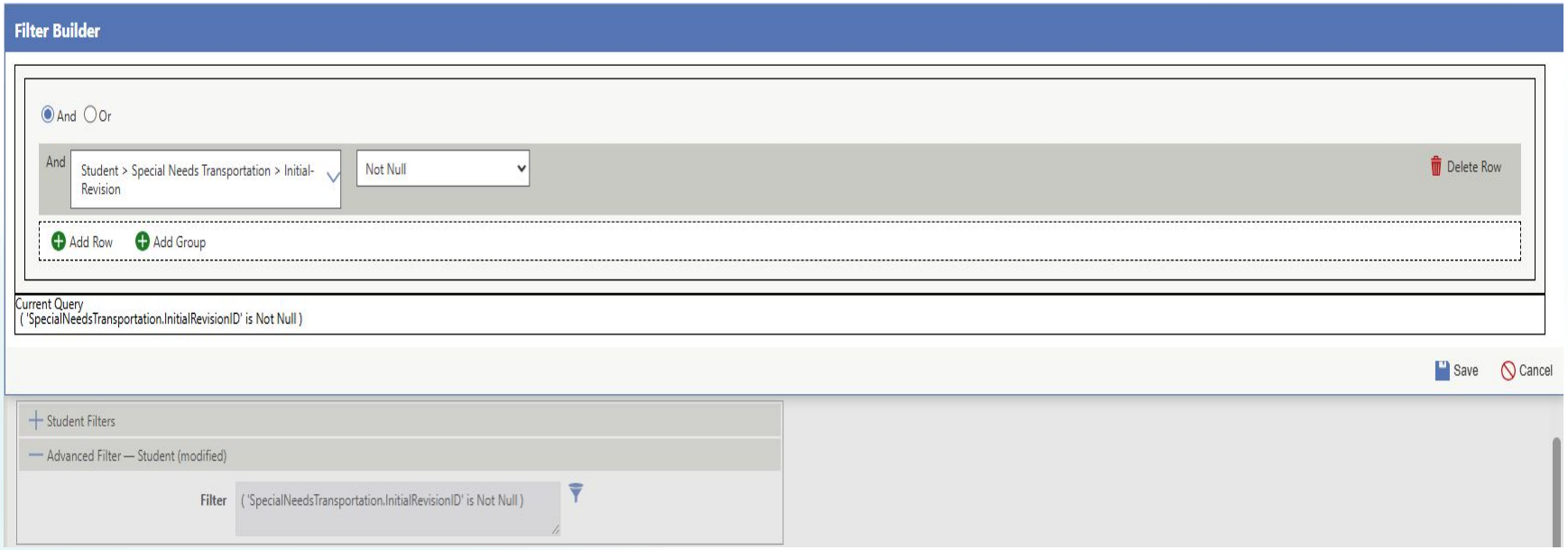
What do we do now?

- Decide how data gets inputted
- Determine what kicks off the process
- Create Online Form?
- Create reports for the data?

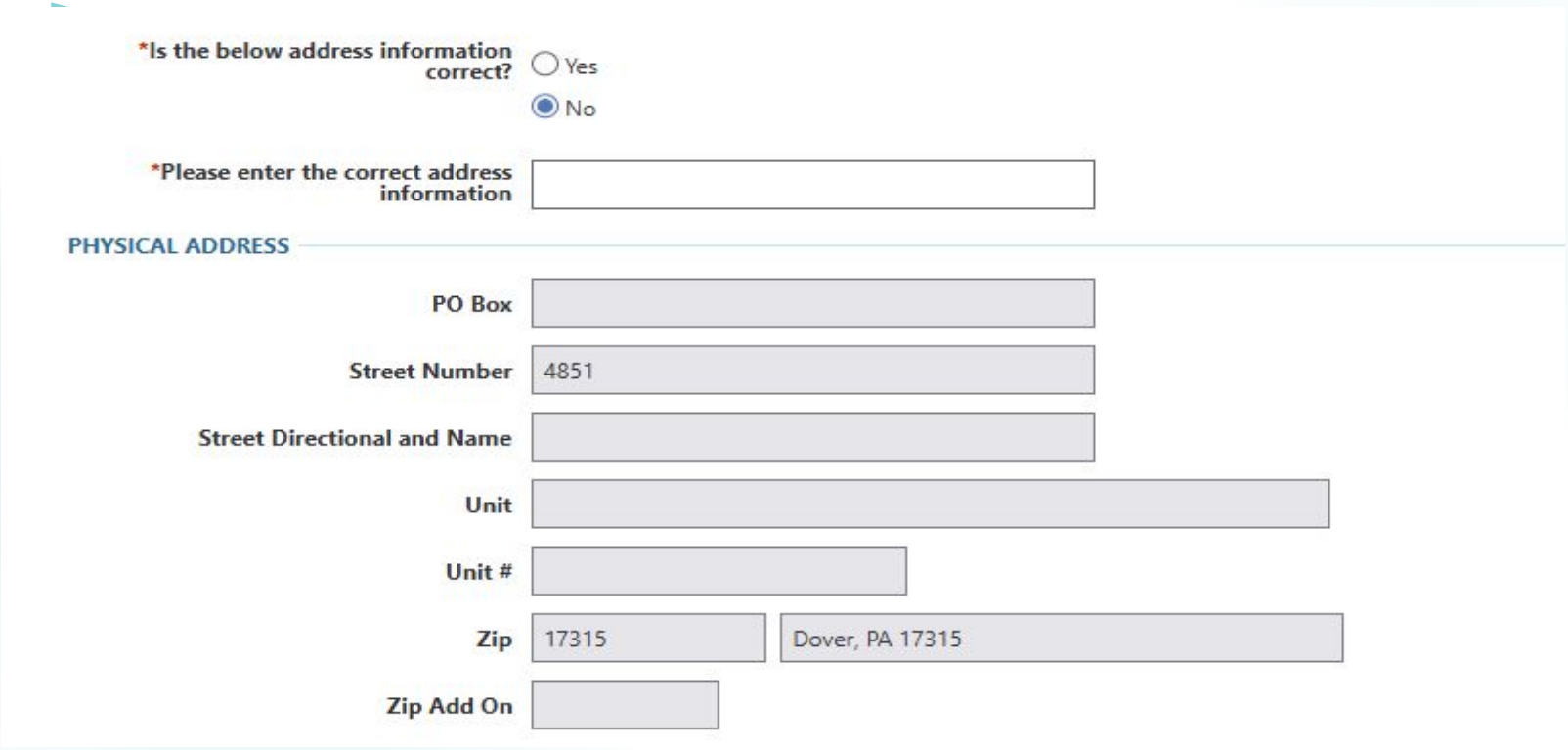
Online Form


General
Steps
Approval Security Groups
Approvers
Online Form Submission Statuses
ONLINE FORM DETAILS
Users have started this Online Form. Updates are restricted to only messages and labels.
*Form Name
Exceptional Children Transportation
Use in Process Manager
*Entities
100 - Dover Elementary School
101 - Leib Elementary School
102 - North Salem Elementary School
103 - Weigelstown Elementary School
300 - Dover Area Middle School
400 - Dover Area High School
*Start Date
07/17/2025 Thursday
*End Date
08/18/2025 Monday
Cutoff Time
Online Form Description
Online Form Type
STU
Student
Enable 'Contact District' Button
Allow Multiple Forms per User
Allow Automatic Approval
*Approval Security Groups
ADM-FormApproval
Clear

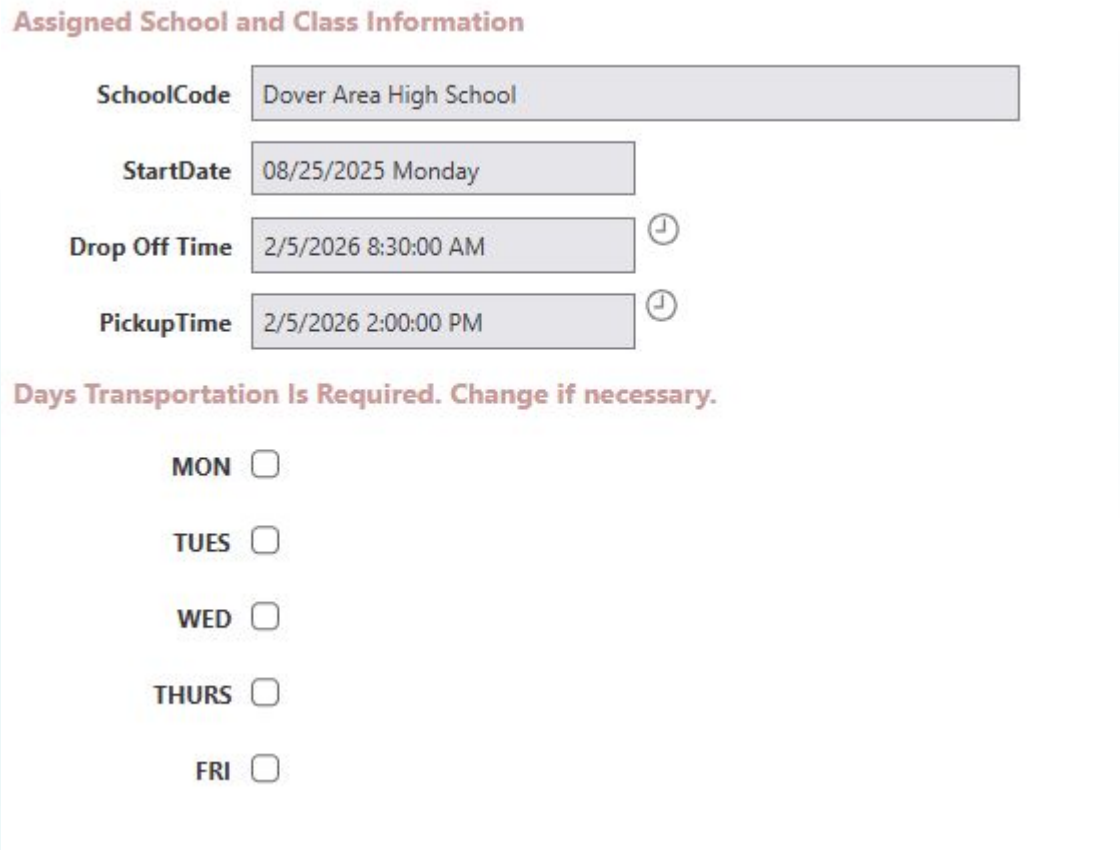
Online Form Filters



Create Steps



Steps

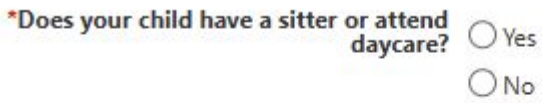

Assigned School and Class Information
SchoolCode
Dover Area High School
StartDate
08/25/2025 Monday
Drop Off Time
2/5/2026 8:30:00 AM
PickupTime
2/5/2026 2:00:00 PM
Days Transportation Is Required. Change if necessary.
MON
TUES
WED
THURS
FRI

Why Conditional



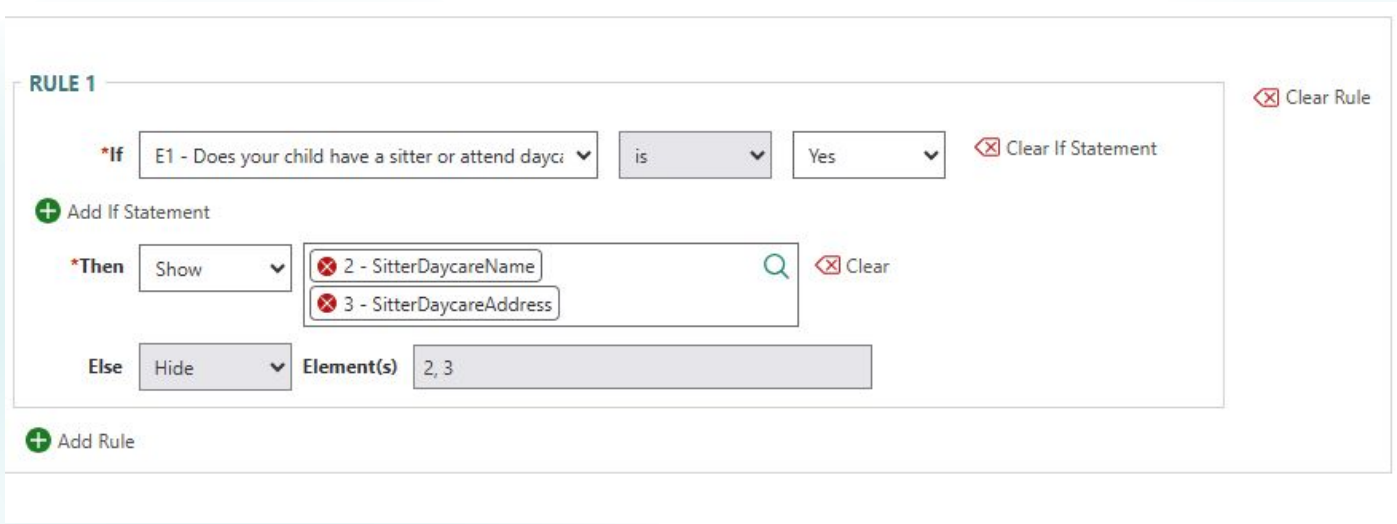


Steps with Conditional Formatting

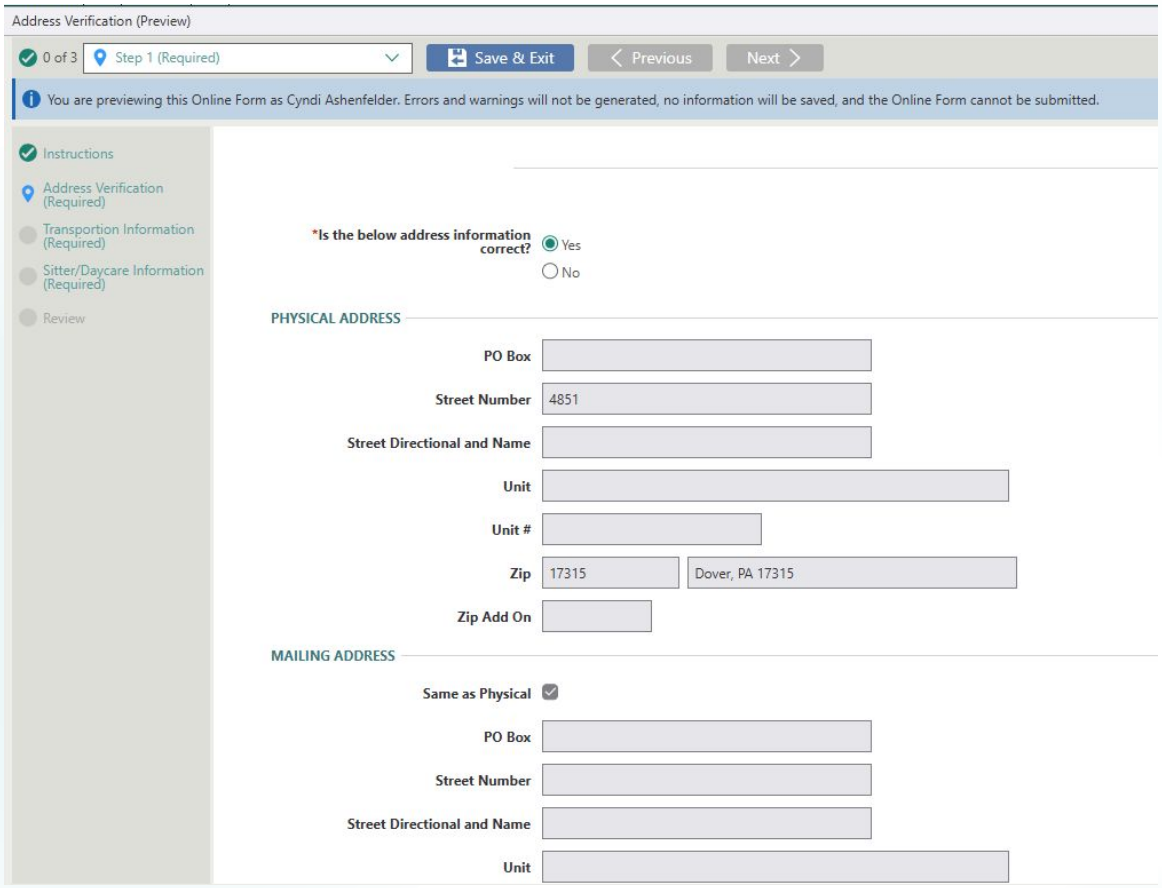




Conditional Setup



Preview Online Form



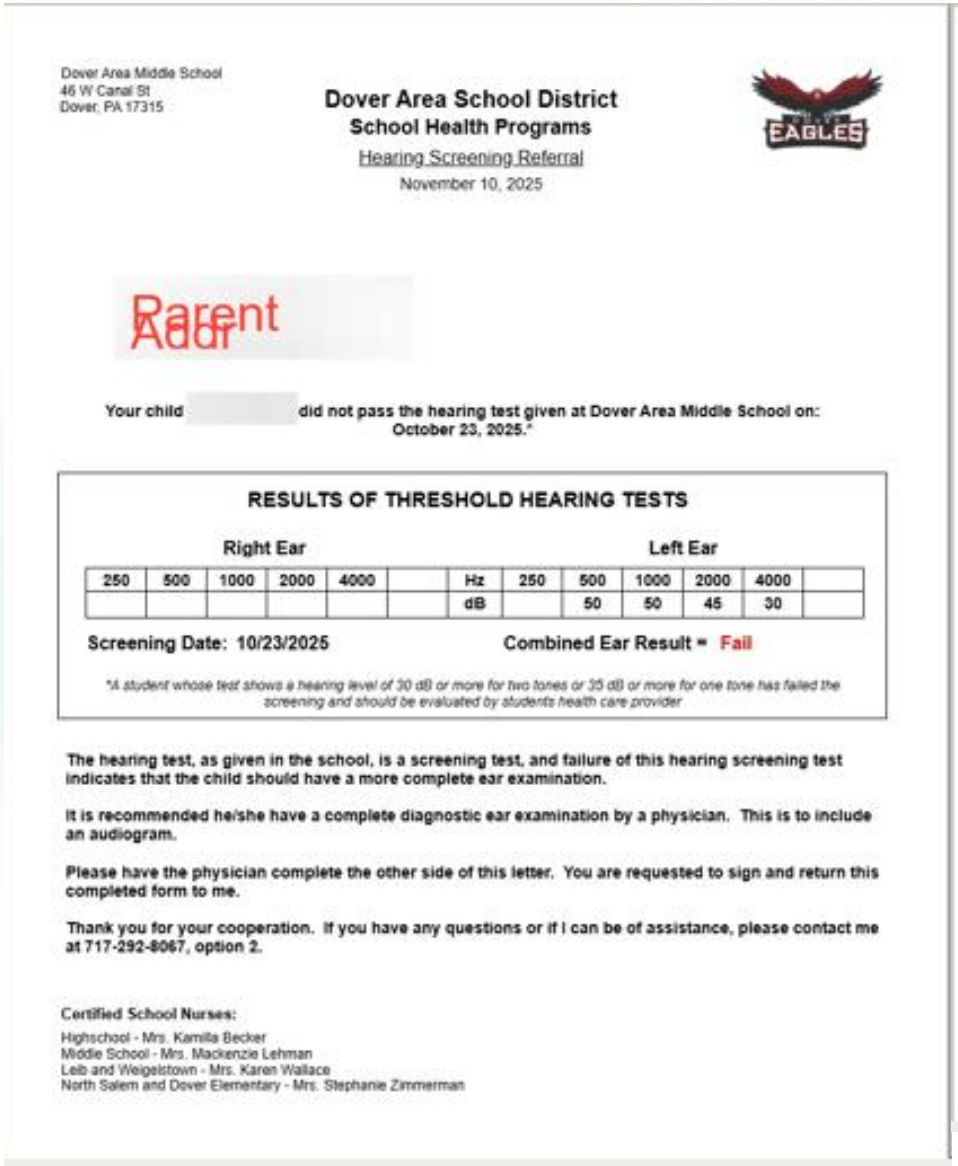
Reporting That Drives Results

-
-
- Empower staff w
- Ensure data accur

Report Design Tips

- **Know your audience**
- Use clear naming conventions
- Highlight trends, not just totals
- Automate report delivery when possible

Developing Reports



Dover Area Middle School
46 W Canal St
Dover, PA 17315

Dover Area School District
School Health Programs
Hearing Screening Referral
November 10, 2025

Parent
Addr

Your child [redacted] did not pass the hearing test given at Dover Area Middle School on: October 23, 2025.*

RESULTS OF THRESHOLD HEARING TESTS

Right Ear							Left Ear						
250	500	1000	2000	4000		Hz	250	500	1000	2000	4000	
						dB		50	50	45	30	

Screening Date: 10/23/2025 **Combined Ear Result = Fail**

**A student whose test shows a hearing level of 30 dB or more for two tones or 35 dB or more for one tone has failed the screening and should be evaluated by students health care provider*

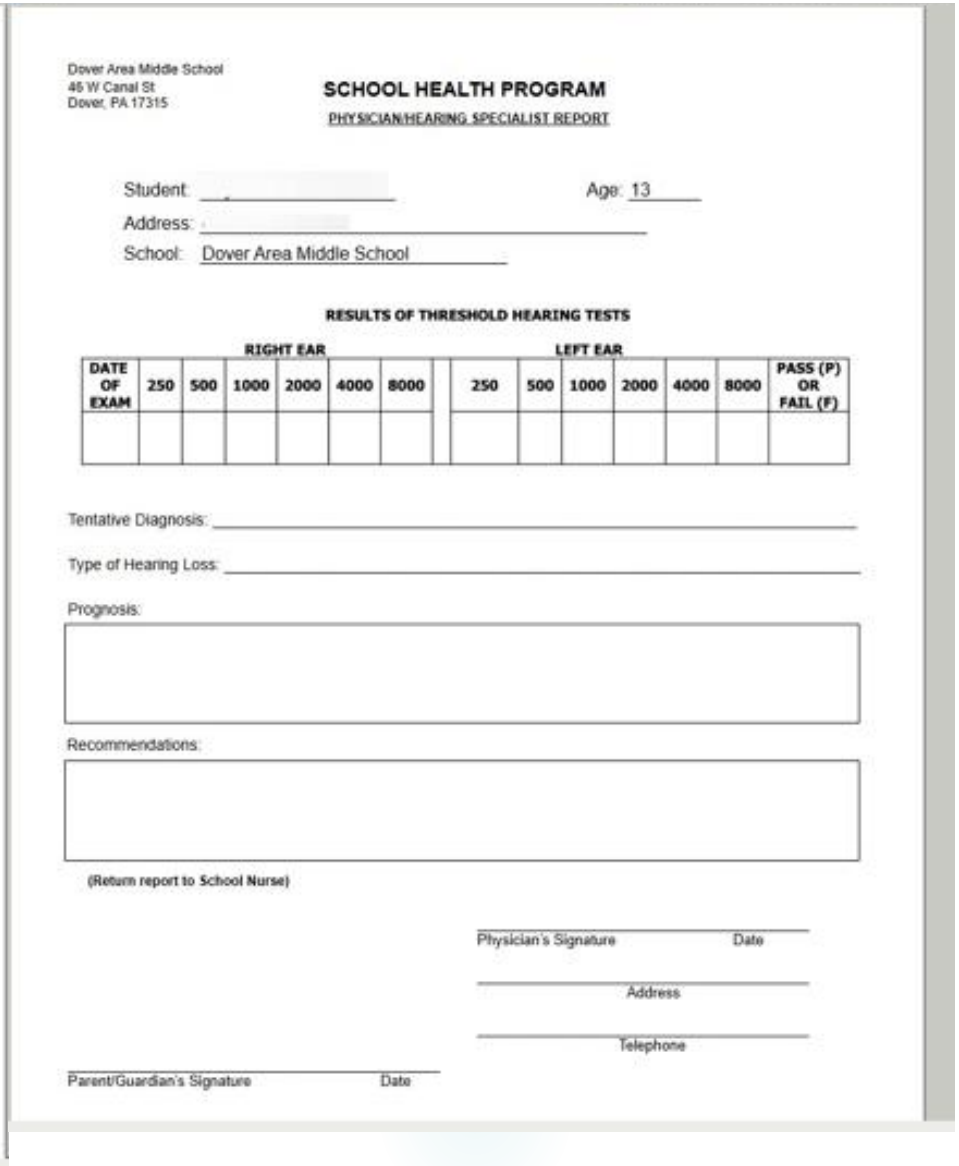
The hearing test, as given in the school, is a screening test, and failure of this hearing screening test indicates that the child should have a more complete ear examination.

It is recommended he/she have a complete diagnostic ear examination by a physician. This is to include an audiogram.

Please have the physician complete the other side of this letter. You are requested to sign and return this completed form to me.

Thank you for your cooperation. If you have any questions or if I can be of assistance, please contact me at 717-292-8067, option 2.

Certified School Nurses:
Highschool - Mrs. Kamilla Becker
Middle School - Mrs. Mackenzie Lehman
Leib and Weigelstown - Mrs. Karen Wallace
North Salem and Dover Elementary - Mrs. Stephanie Zimmerman



Dover Area Middle School
46 W Canal St
Dover, PA 17315

SCHOOL HEALTH PROGRAM
PHYSICIAN/HEARING SPECIALIST REPORT

Student: [redacted] Age: 13
Address: [redacted]
School: Dover Area Middle School

RESULTS OF THRESHOLD HEARING TESTS

	RIGHT EAR						LEFT EAR						
DATE OF EXAM	250	500	1000	2000	4000	8000	250	500	1000	2000	4000	8000	PASS (P) OR FAIL (F)

Tentative Diagnosis: _____

Type of Hearing Loss: _____

Prognosis:

Recommendations:

(Return report to School Nurse)

_____ Physician's Signature Date

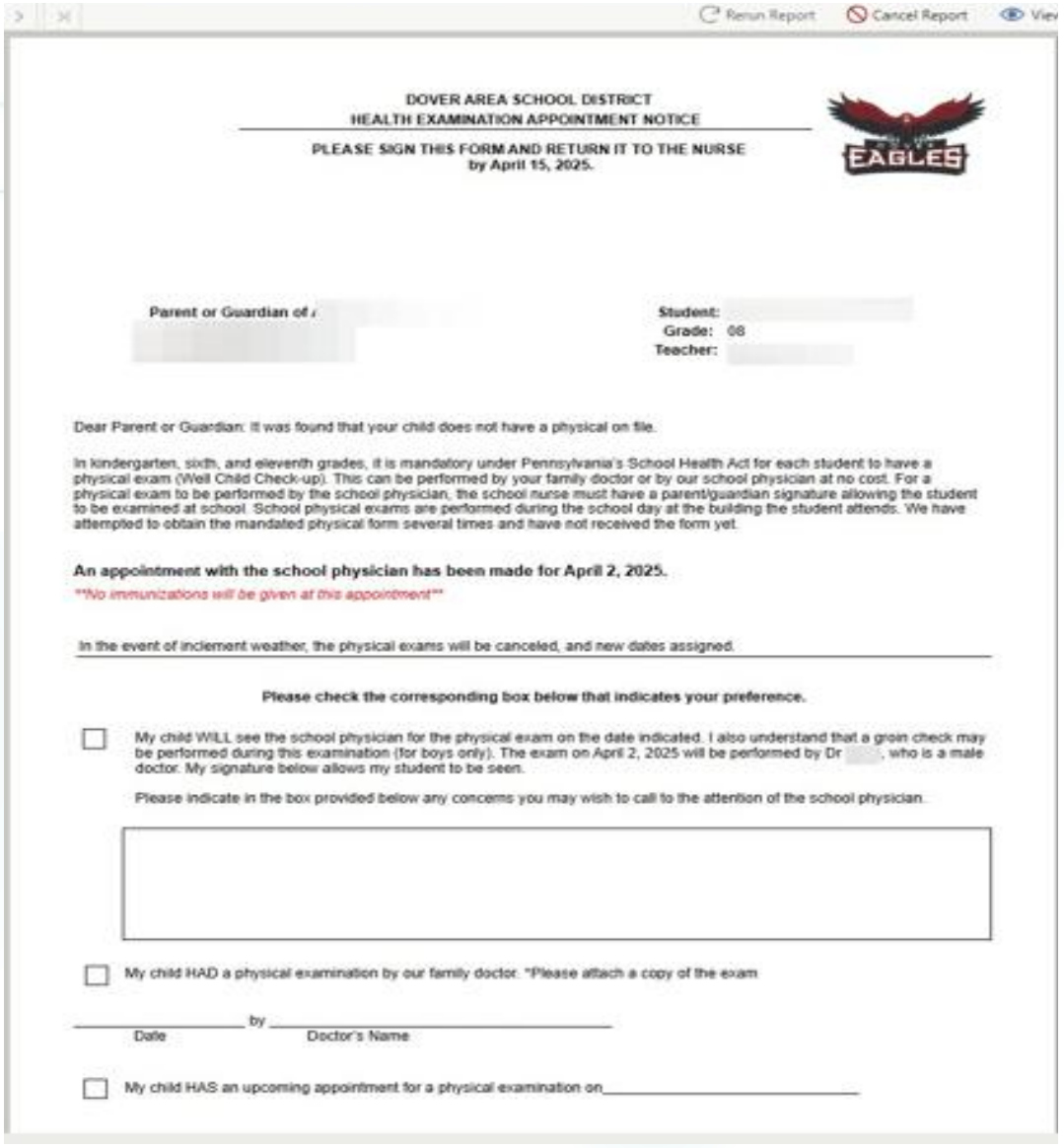
_____ Address

_____ Telephone

_____ Parent/Guardian's Signature Date

Creating Usable Prompts





Using Case Statements

This report provides information about the student's scores on the ACCESS for ELLs English language proficiency test. This test is based on the WIDA English Language Development Standards and is used to measure students' progress in learning English. Scores are reported as Language Proficiency Levels and as Scale Scores.

Language Domain	Proficiency Level (Possible 1.0-6.0)	Scale Score (Possible 100-600) and Confidence Band See Interpretive Guide for Score Reports for definitions (100 200 300 400 500 600)
Listening	6.0	427
Speaking	3.3	309
Reading	3.5	346
Writing	3.5	323
Oral Language 50% Listening + 50% Speaking	4.6	345
Literacy 50% Reading + 50% Writing	3.5	335
Comprehension 70% Reading + 30% Listening	5.3	370
Overall 35% Reading + 35% Writing + 15% Listening + 15% Speaking	3.8	345

Domain	Proficiency Level	Student at this level generally can...
Listening	6	understand oral language in English and participate in all academic classes, for example: • Synthesize information from multiple speakers • Recognize language that conveys information with precision and accuracy • Create models or visuals to represent detailed information presented orally • Identify strengths and limitations of different points of view
Speaking	3	communicate ideas and details orally in English using several connected sentences and can participate in short conversations and discussions in school, for example: • Relate stories or events • Share ideas and provide details • Describe processes or procedures
Reading	4	understand written language related to common topics in school and can participate in class discussions, for example: • Classify main ideas and examples in written information • Identify main information that tells who, what, when, or where something happened • Identify steps in written processes and procedures
Writing	4	communicate in writing in English using language related to common topics in school, for example: • Describe familiar issues and events • Create stories or short narratives • Describe processes and procedures with some details • Give opinions with reasons in a few short sentences

This report provides information about the student's scores on the ACCESS for ELLs English language proficiency test. This test is based on the WIDA English Language Development Standards and is used to measure students' progress in learning English. Scores are reported as Language Proficiency Levels and as Scale Scores.

Language Domain	Proficiency Level (Possible 1.0-6.0)	Scale Score (Possible 100-600) and Confidence Band See Interpretive Guide for Score Reports for definitions (100 200 300 400 500 600)
Listening	2.5	266
Speaking	3.3	289
Reading	1.9	271
Writing	1.6	204
Oral Language 50% Listening + 50% Speaking	3.0	250
Literacy 50% Reading + 50% Writing	1.8	238
Comprehension 70% Reading + 30% Listening	1.9	270
Overall 35% Reading + 35% Writing + 15% Listening + 15% Speaking	1.9	250

Domain	Proficiency Level	Student at this level generally can...
Listening	3	understand oral language related to specific familiar topics in school and can participate in class discussions, for example: • Identify main topics in discussions • Categorize or sequence information presented orally using pictures or objects • Follow short oral directions with the help of pictures
Speaking	3	communicate ideas and details orally in English using several connected sentences and can participate in short conversations and discussions in school, for example: • Relate stories or events • Share ideas and provide details • Describe processes or procedures
Reading	2	understand written texts that include visuals and may contain a few words or phrases in English, for example: • Interpret information from graphs, charts, and other visual information • Comprehend short text with illustrations and simple and familiar language • Identify steps in processes presented in graphs or short texts with illustrations • Identify words and phrases that express opinions and claims
Writing	2	communicate in writing using visuals and symbols that may contain few words in English, for example: • Express ideas or concepts using text and illustrations • Share personal experiences through drawings and words • Label steps in processes presented in graphs or short texts • State opinions or preferences through text and illustrations

Insert Calculate Field

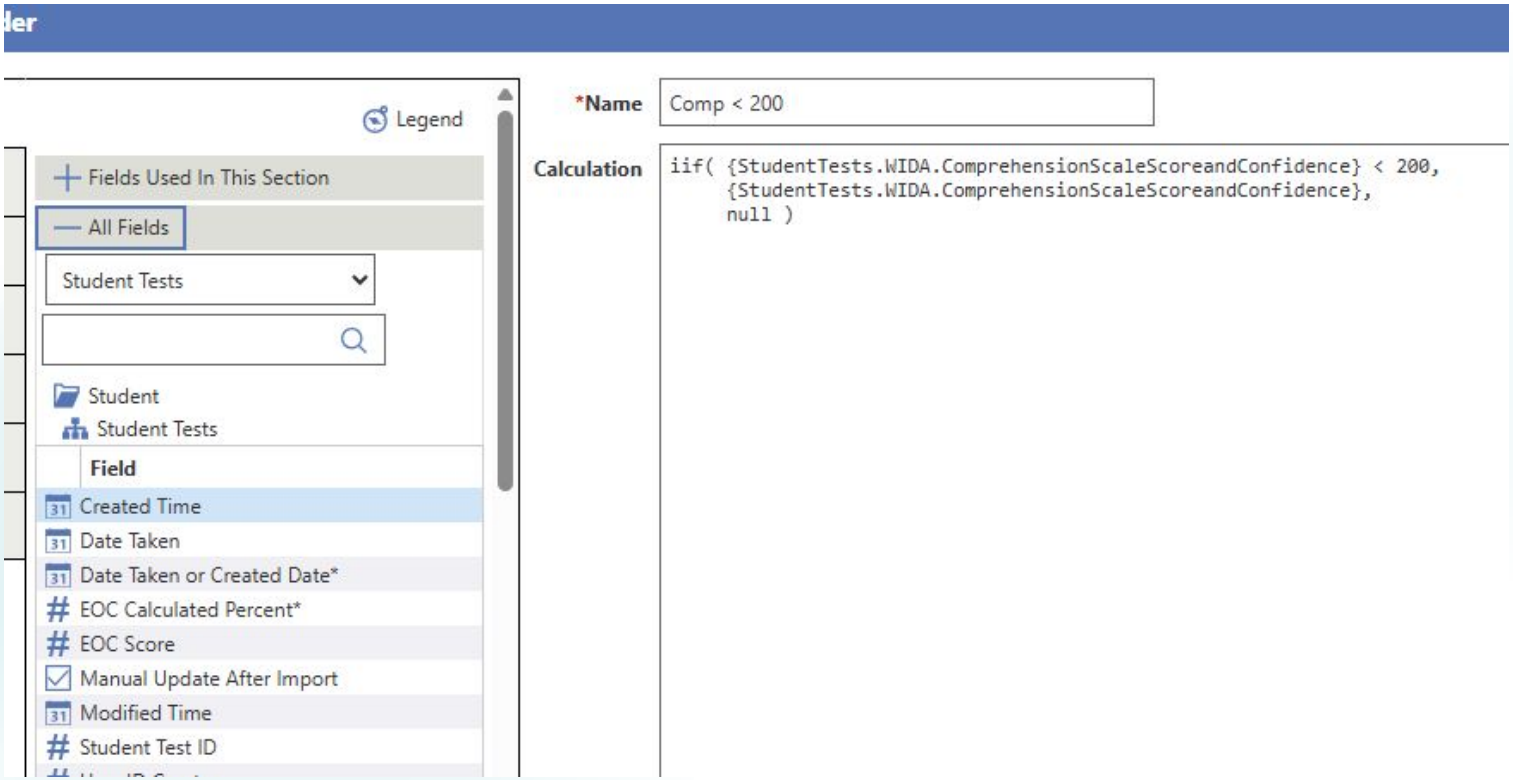


Case Statement Example

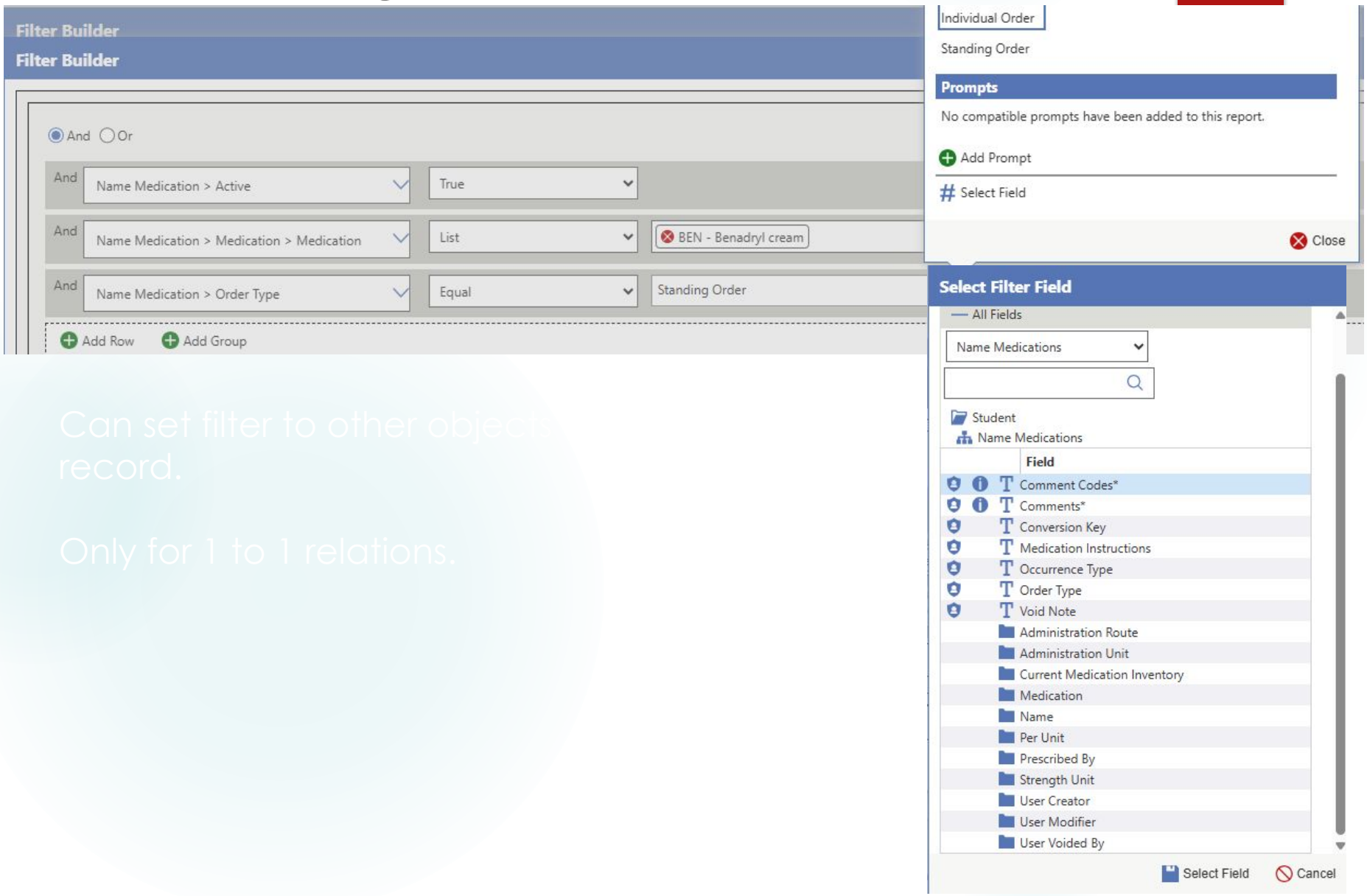
DomainListening1

```
case( when( {StudentTests.WIDA.ListeningProficiency} > 4.9 AND {StudentTests.WIDA.ListeningProficiency} < 6, "understand oral language in English and participate in all
academic classes, for example:
• Expand on others' ideas
• Distinguish events, people, or situations from oral descriptions
• Recall key information and details about processes or concepts discussed orally
• Identify examples and reasons that support an opinion or viewpoint
" ),
      when( {StudentTests.WIDA.ListeningProficiency} > 3.9 AND {StudentTests.WIDA.ListeningProficiency} < 5, "understand oral language in English related to specific topics
in school and can participate in class discussions, for example:
• Exchange information and ideas with others
• Connect people and events based on oral information
• Apply key information about processes or concepts presented orally
• Identify positions or points of view on issues in oral discussions
" ),
      when( {StudentTests.WIDA.ListeningProficiency} > 2.9 AND {StudentTests.WIDA.ListeningProficiency} < 4, "understand oral language related to specific common topics in
school and can participate in class discussions, for example:
• Connect spoken ideas to own experiences
• Find, select, and order information from oral descriptions
• Identify the causes and effects of events or situations discussed orally
• Classify pros and cons of issues in discussions" ),
      when( {StudentTests.WIDA.ListeningProficiency} > 1.9 AND {StudentTests.WIDA.ListeningProficiency} < 3, "understand oral language related to specific familiar topics in
school and can participate in class discussions, for example:
• Identify main topics in discussions
• Categorize or sequence information presented orally using pictures or objects
• Follow short oral directions with the help of pictures
• Sort facts and opinions stated orally
" ),
      when( {StudentTests.WIDA.ListeningProficiency} > 0 AND {StudentTests.WIDA.ListeningProficiency} < 2, "understand oral messages that include visuals and gestures and
may contain a few everyday words or phrases in English, for example:
• Recognize familiar words and phrases in conversations
• Match information from oral descriptions to objects, figures, or illustrations
• Follow one-step oral directions
• Show agreement or disagreement with oral statements" ),
      when( {StudentTests.WIDA.ListeningProficiency} > 5.9, "understand oral language in English and participate in all academic classes, for example:
• Synthesize information from multiple speakers
• Recognize language that conveys information with precision and accuracy
• Create models or visuals to represent detailed information presented orally
• Identify strengths and limitations of different points of view
" ),
      else( null ) )
```

IIF Statement Example



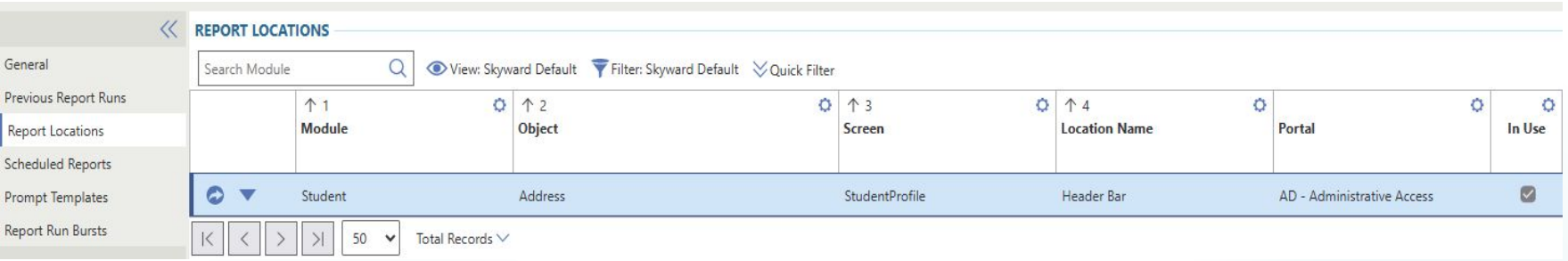
Filtering in Reports

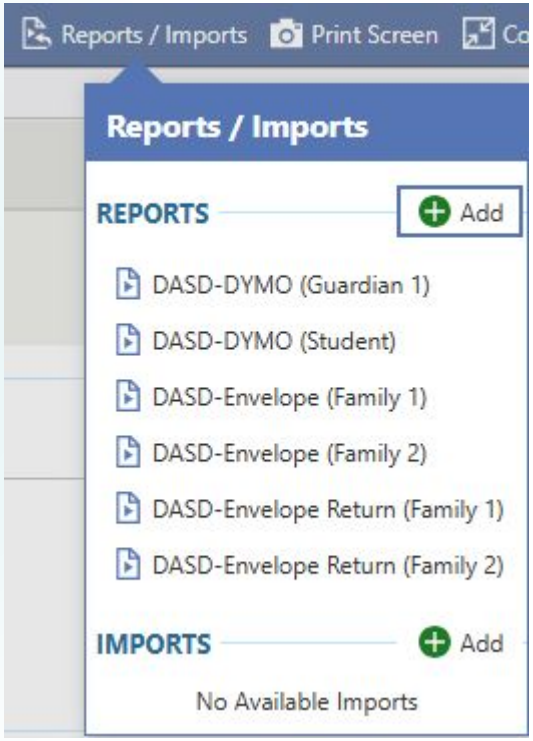


Can set filter to other objects record.

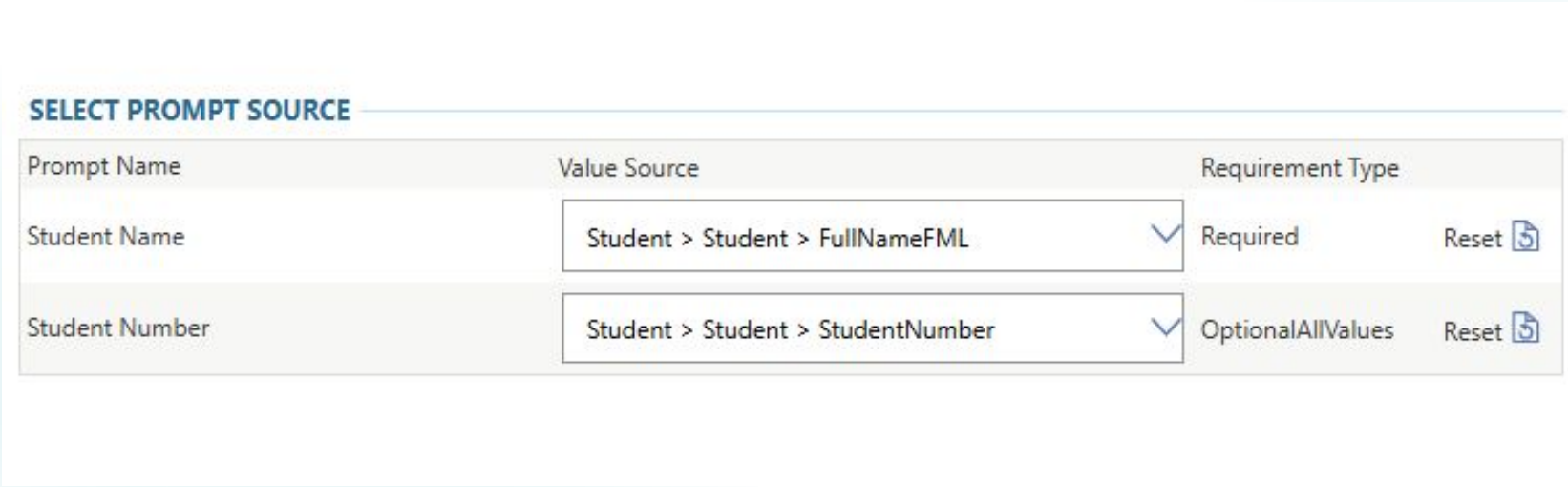
Only for 1 to 1 relations.

Publishing Reports





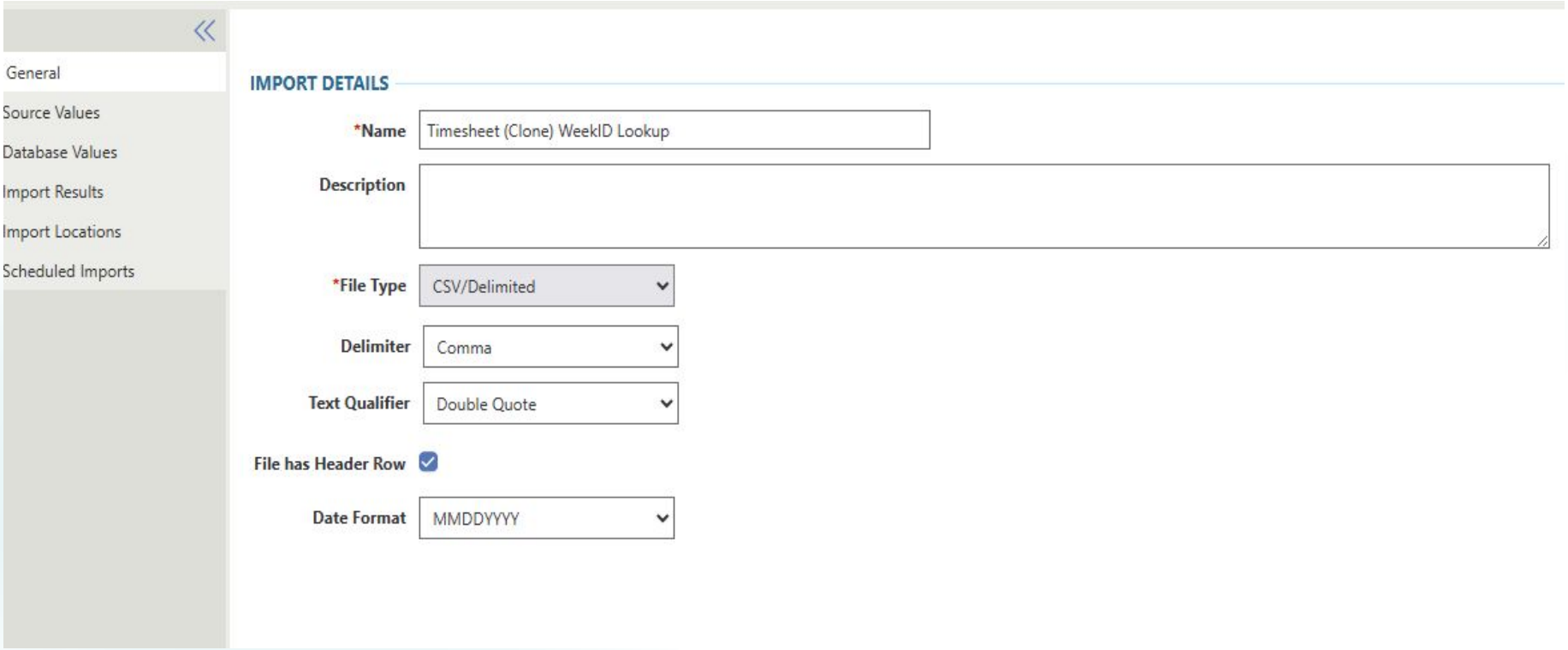
Filters on Prompt Source



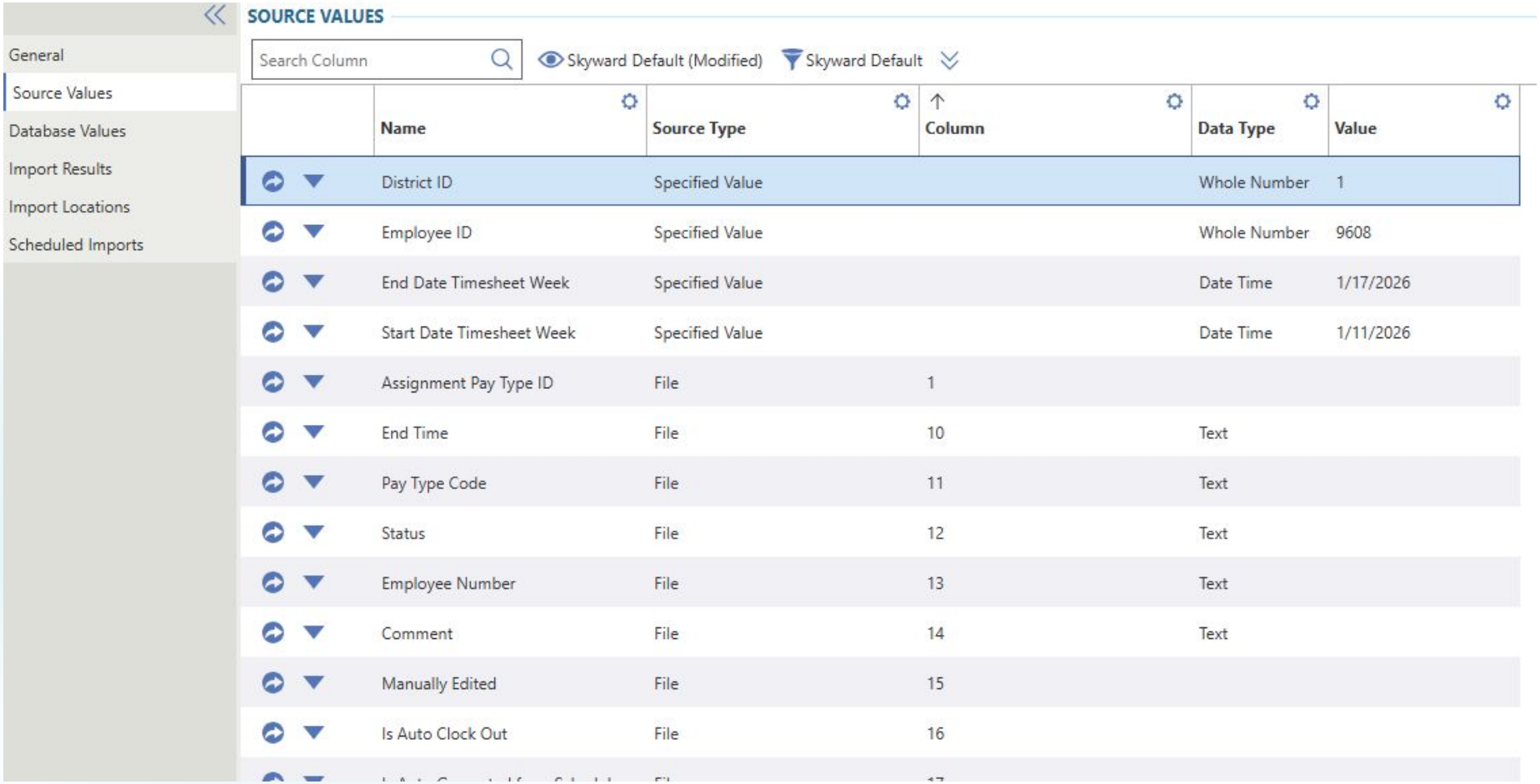
Imports vs Mass Update

- What is the Difference?
- Can both be used?
- What can I import vs Mass Update?

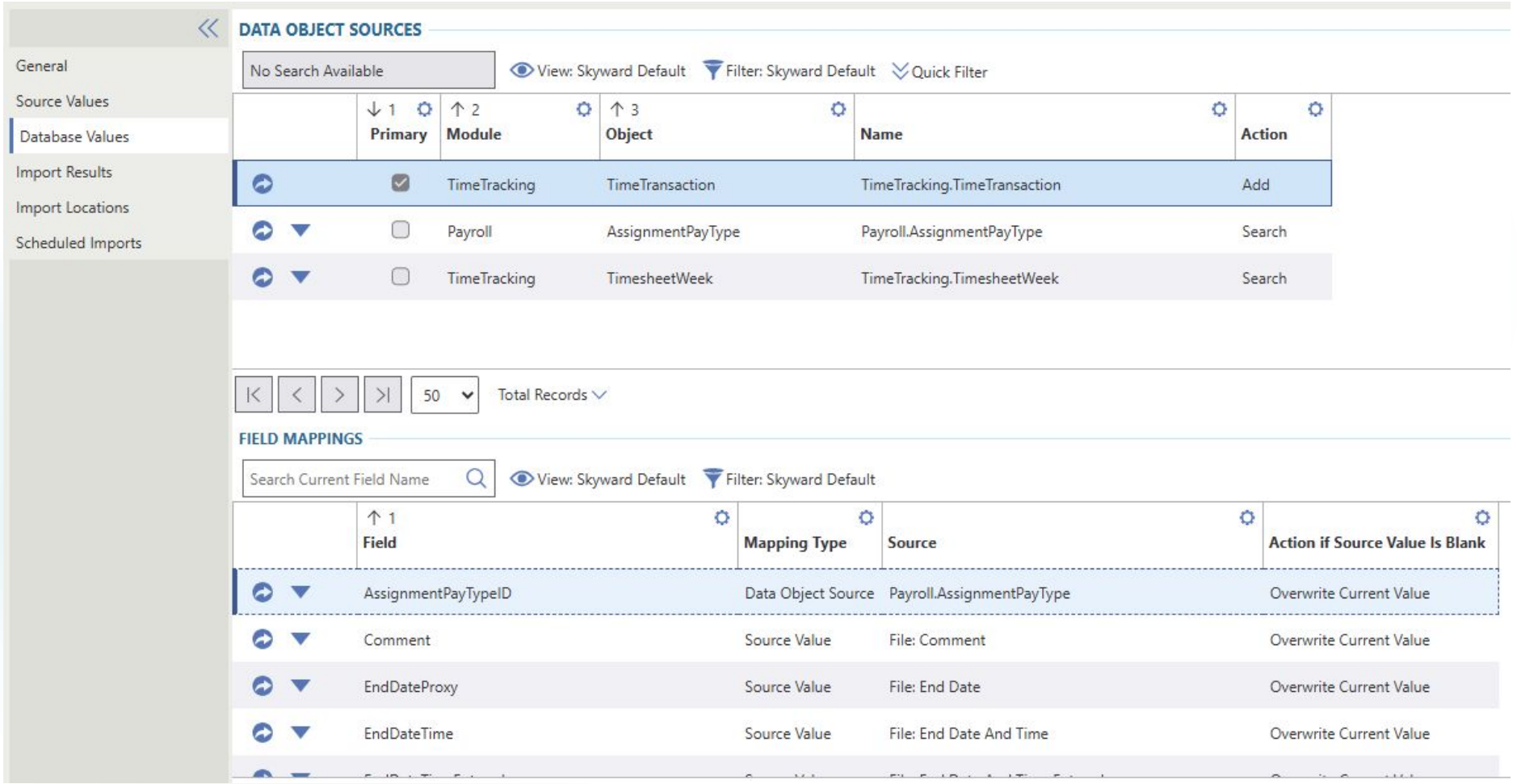
Import Setup



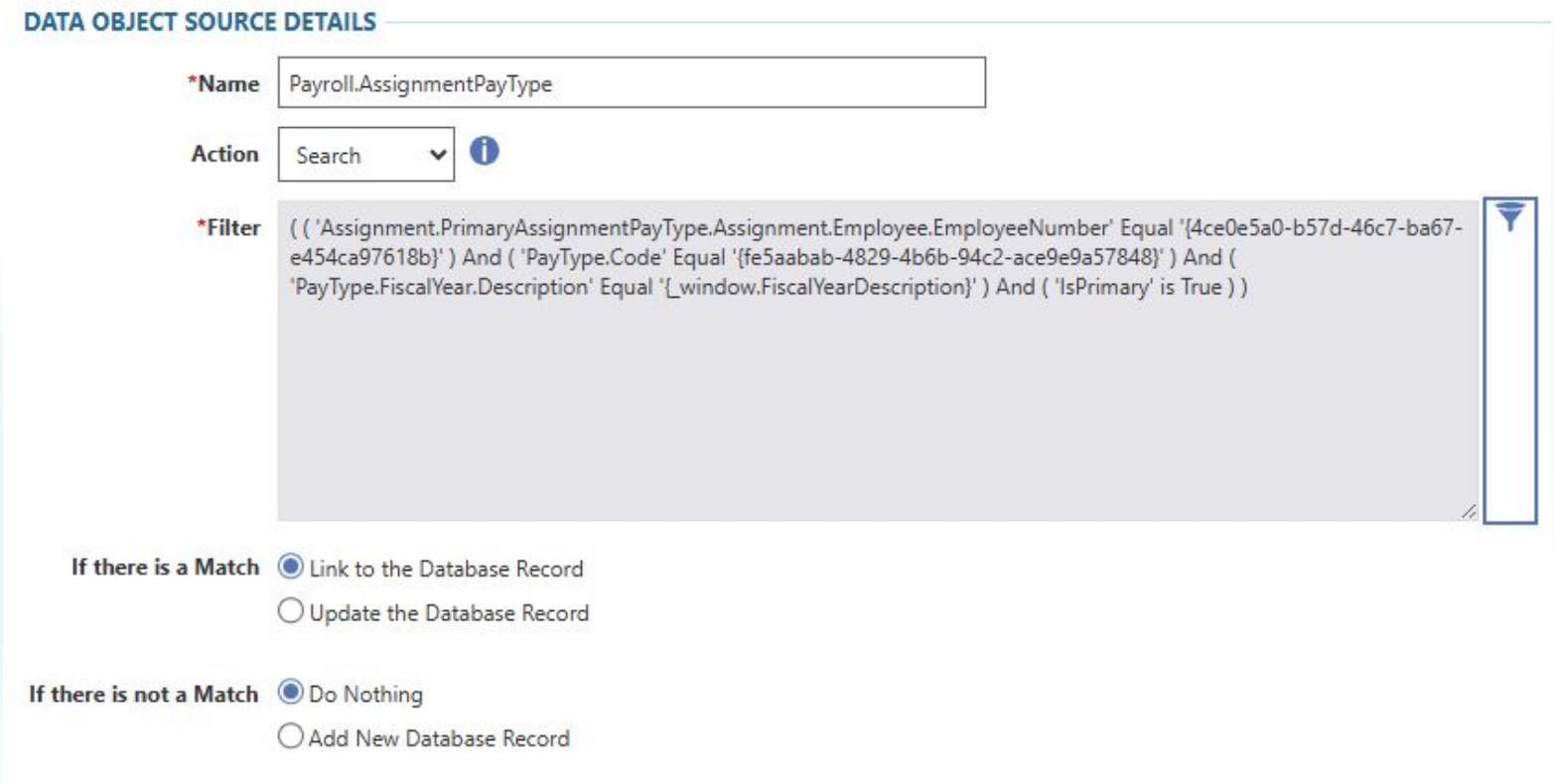
Import Source Values



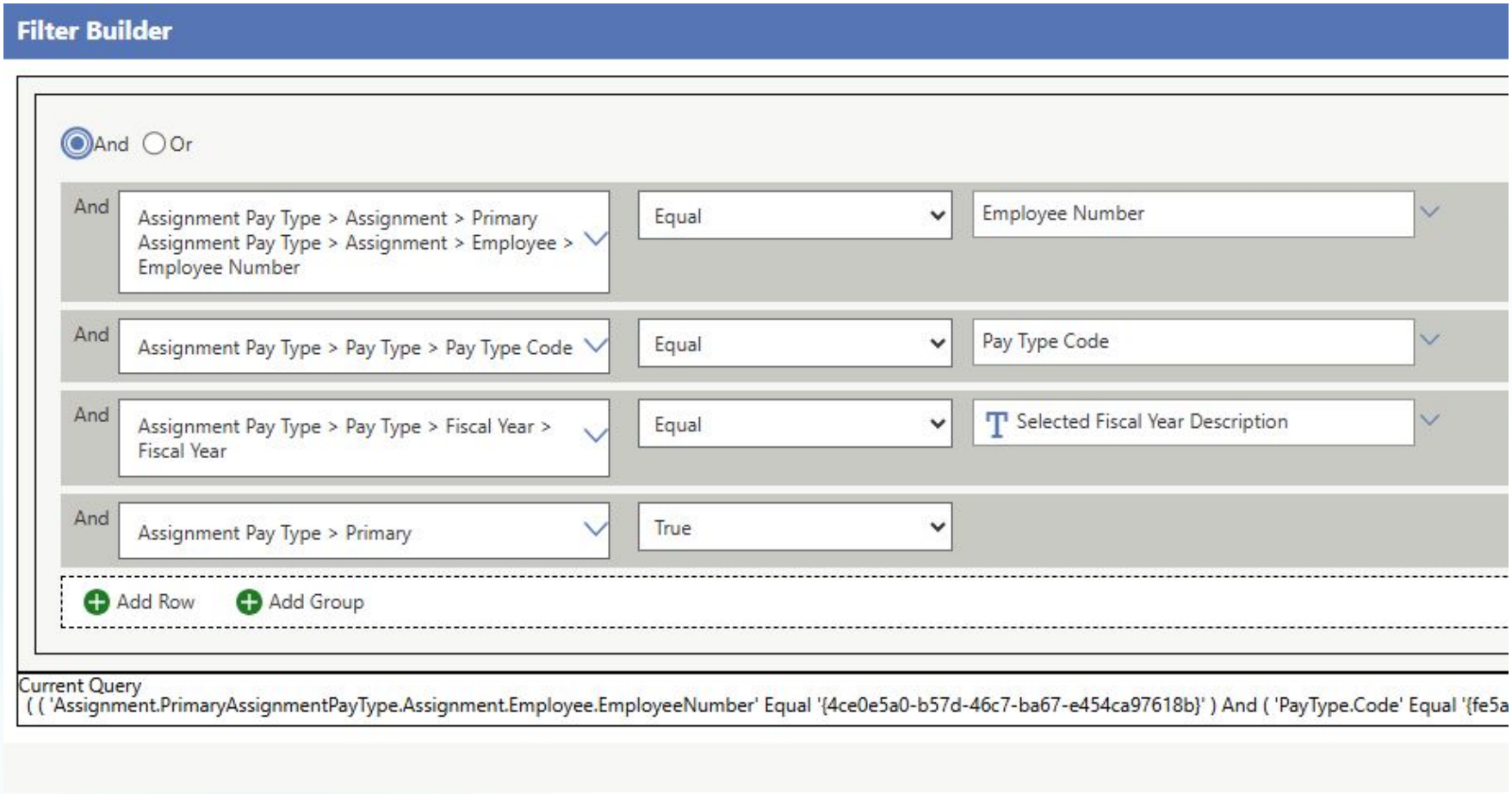
Import Data Objects



Linking Data Objects



Filter Data Objects



Real-World Scenarios from Dover Area SD

-Special Needs Transportation Information - Form

-CTE Note Import

-Doctors Note Required Indicator from Attendance

-Nurse Office Letters

-Failure Letter (Per Parent)

-Standing order Medication for new students - Import

-Low Medication Inventory phone calls via Parent Square

Creating User-Friendly Interfaces

- **Design with the end user in mind**
- Minimize clicks and confusion
- Use consistent layouts and labels
- Provide guidance and documentation

Measuring Success

- **Time saved on manual processes**
- Reduction in data errors
- Improved response times
- Higher confidence in decision-making

Key Takeaways

- Skyward Q is most powerful when customized intentionally
- Power users drive efficiency and accuracy
- Start small, iterate often
- Leverage templates and shared best practices

Dustin Boyd

Email:dmboyd@doversd.org

Cell:717-891-2212

Resources