Recommended Steps for Districts using Rolled over, Prior Year Data

1. Read the important information on the Home page
2. Navigate to the District/Staff page
3. Add new staff
    a. Certified
    b. Non-Certified
4. Delete staff
    a. From the district
    b. From a building
5. Move staff
6. Enter salary data
    a. Directly into the application
    b. Upload salary data into the application
7. Check and fix errors and warnings
8. Complete the District Contact information
9. Complete the Mentoring and Induction form
10. Certify

Fall BEDS Staff Exercises using Rolled Over, Prior Year Data

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Fall BEDS Staff Collection Training - Exercises

Exercise 1 – Adding new Certified Staff

Overview

The purpose of this exercise is to demonstrate the steps necessary to add new Certified Staff.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District/Staff page
4) Add new Certified Staff

Exercises

The following steps outline the tasks you will complete in order to gain experience adding new Certified Staff.

Exercise 1
Adding new Certified Staff

1. Access the EDINFO application menu
   a. Open Internet Explorer

   b. Enter the URL https://www.edinfo.state.ia.us

   c. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page.

3. Navigate to the District/Staff page
   a. Click on the District/Staff tab or the District/Staff link.

4. Add Certified Staff
   a. Click on the Add Certified Staff link

   b. Enter a folder number and click 'Go'. If they are already in the system, the form will populate. If not, continue to step c.

   c. Enter the data for the required fields. Fields in red are the required fields.

   d. Save the demographic data—3 Options

      i. Click on Save and Return to save the demographic data and return to the District/Staff page. Continue to Step 5.
      ii. Click on Save and Add Assignment to save the demographic data and add assignment data. Continue to Step 5c.
      iii. Click on Save and Add Another Staff to save the demographic data and bring up blank Add form to add another staff. Continue to Step 5.

5. Add Assignment data
   a. Click on District/Staff tab or the District/Staff link.

   b. Click on the magnifying glass icon to view/edit assignment detail.

c. Click on the Add a Position link.

d. Enter the required fields.

e. Click on the Save button.

Fall BEDS Staff Collection Training - Exercises

Exercise 2 – Adding new Non-Certified Staff

Overview

The purpose of this exercise is to demonstrate the steps necessary to add new Non-Certified Staff.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District/Staff page
4) Add new Non-Certified staff

Exercises

The following steps outline the tasks you will complete in order to gain experience adding new Non-Certified Staff.

Exercise 2
Adding new Non-Certified Staff

1. Access the EDINFO application menu
   a. Open Internet Explorer

   b. Enter the URL https://www.edinfo.state.ia.us

   c. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page.

3. Navigate to the District/Staff page
   a. From the home page, click on the District/Staff tab or the District/Staff link

4. Add Non-Certified Staff
   a. Click on the Add Non-Certified Staff link

   b. Enter the data for the required fields. Fields in red are the required fields.

   c. Save the demographic data—3 Options

      i. Click on Save and Return to save the demographic data and return to the District/Staff page. Continue to Step 5.
      ii. Click on Save and Add Assignment to save the demographic data and add assignment data. Continue to Step 5c.
      iii. Click on Save and Add Another Staff to save the demographic data and bring up blank Add form to add another staff. Continue to Step 5.

5. Add Assignment data
   a. Click on District/Staff tab or the District/Staff link.

   b. Click on the magnifying glass icon to view/edit assignment detail.

   c. Click on the Add a Position link.

d. Enter the required fields.

e. Click on the Save button.

Fall BEDS Staff Collection Training - Exercises

Exercise 3 – Deleting Staff From the District

Overview

The purpose of this exercise is to demonstrate the steps necessary to delete staff from the district.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District/Staff page
4) Delete staff from the district

Exercises

The following steps outline the tasks you will complete in order to gain experience deleting staff from the district.

Exercise 3
Deleting Staff From the District

1. Access the EDINFO application menu
   a. Open Internet Explorer

   b. Enter the URL https://www.edinfo.state.ia.us

   c. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page.

3. Navigate to the District/Staff page
   a. From the home page, click on the District/Staff tab or the District/Staff link

4. Delete staff from the district
   a. Click the red circle with the X next to the staff to be deleted

   b. A warning message will appear indicating that this will delete this person and all of their positions and assignments

   c. Click the OK button to delete the staff

Fall BEDS Staff Collection Training - Exercises

Exercise 4 – Deleting Staff From a Building

Overview

The purpose of this exercise is to demonstrate the steps necessary to delete staff from a building.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District/Staff page
4) Delete staff from a building

Exercises

The following steps outline the tasks you will complete in order to gain experience deleting staff from the district.

Exercise 4
Deleting Staff From a Building

1. Access the EDINFO application menu
   a. Open Internet Explorer

   b. Enter the URL https://www.edinfo.state.ia.us

   c. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page

3. Navigate to the District/Staff page
   a. From the home page, click on the District/Staff tab or the District/Staff link

4. Delete staff from a building
   a. Click the magnifying glass icon to view/edit assignment detail

   b. Click the red circle with the X for the positions of the staff associated with the building they are to be deleted from

   c. A warning message will appear indicating that the position and all assignments associated with that position will be deleted

   d. Click the OK button to delete the position and delete the staff from the building

Fall BEDS Staff Collection Training - Exercises

Exercise 5 – Move an Assignment to Another Building

Overview

The purpose of this exercise is to demonstrate the steps necessary to move a staff assignment from one building in the district to another building in the district.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District/Staff page
4) Move staff assignment from one building to another

Exercises

The following steps outline the tasks you will complete in order to gain experience moving a staff assignment from one building in the district to another building in the district.

Exercise 5
Move an Assignment to Another Building

1. Access the EDINFO application menu
   a. Open Internet Explorer

   b. Enter the URL https://www.edinfo.state.ia.us

   c. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page

3. Navigate to the District/Staff page
   a. From the home page, click on the District/Staff tab or the District/Staff link

4. Move staff assignment from one building to another
   a. Click the magnifying glass icon to view/edit assignment detail

   b. Click the pencil and paper icon to edit the assignment

   c. Use the dropdown for Building/School to change the school

   d. Click the Save button

Fall BEDS Staff Collection Training - Exercises

Exercise 6 – Enter Salary Data In the Application

Overview

The purpose of this exercise is to demonstrate the steps necessary to enter salary data in the application.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District/Staff page
4) Change to Salary Mode
5) Enter salary data

Exercises

The following steps outline the tasks you will complete in order to gain experience entering salary data in the application.

Exercise 6
Entering Salary Data in the Application

1. Access the EDINFO application menu
   a. Open Internet Explorer

   b. Enter the URL https://www.edinfo.state.ia.us

   c. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page

3. Navigate to the District/Staff page
   a. From the home page click on the District/Staff tab or the District/Staff link

4. Change to Salary Mode
   a. Click in the circle next to Salary

5. Enter salary data
   a. Enter data for the salary fields

   b. Save the data
      i. Click on the Save button to the left of the staff to save data for staff individually
      ii. Click on the Save all values on current page button to save all of the data on the page
      iii. If desired, click on Save Current View in Excel to save all of the values in an Excel spreadsheet for your records.

Fall BEDS Staff Collection Training - Exercises

Exercise 7 – Upload Salary Data to the Application

Overview

The purpose of this exercise is to demonstrate the steps necessary to upload salary data to the application.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the Import/Export page
4) Export salary data
5) Enter data in exported file
6) Import salary data

Exercises

The following steps outline the tasks you will complete in order to gain experience uploading salary data to the application.

Exercise 7
Upload Salary Data to the Application

1. Access the EDINFO application menu
   a. Open Internet Explorer

   b. Enter the URL https://www.edinfo.state.ia.us

   c. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page

3. Navigate to the Import/Export page
   a. From the home page, click on the Import/Export tab or the Import/Export link

4. Export salary data
   a. Click on the Export-Salary Data tab

   b. Click on the Export Salary Data to Excel link

   c. Click on the Save button to save the Excel file to your computer

   d. Save the file with a name and location you will remember

   e. Click on the Save button

5. Enter data in exported file
   a. Open the exported file from step 4

   b. Enter salary data in appropriate columns (Do not modify the column order or add/delete columns)

   c. Save the file as a tab-delimited file

6. Import salary data

a. From the home page, click on the Import/Export tab or the Import/Export link

b. Click on the Import-Update Staff Salaries tab

c. Click on the Browse… button under Step 1

d. Click on the file you want to upload and click Open

e. Click on the Upload button located under Step 1

f. Click OK on the message that appears letting you know the validation is complete

g. A warning displays letting you know that staff salary will be updated

h. Click on the Update Salaries button located under Step 2

i. Click OK on the message asking if you want to continue if you want to update salary data, otherwise click Cancel

j. A message appears letting you know Step 2 is complete, and that your next step is to go to the Errors/Omissions page for additional validations.

Fall BEDS Staff Collection Training - Exercises

Exercise 8 – Checking and Fixing Errors and Warnings

Overview

The purpose of this exercise is to demonstrate the steps necessary to clear your report of errors and approve warnings.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

5) Connecting to the website
6) Enter the application
7) Navigate to the Errors/Omissions page
8) Check the number and type of errors and omission.
9) Fix errors
   a) Assignment
   b) Demographic
10) Approve warnings
11) Send a comment to the State.

Exercises

The following steps outline the tasks you will complete in order to gain experience fixing errors, approving warnings and communicating with BoEE or the Department.

1. Make sure all errors and omission are appearing.
2. Check the number and type of errors and warnings.
3. Filter the errors and warnings
4. Fix the errors
5. Approve the warnings
6. Send a message to the State.

Exercise 8
Checking and Fixing Errors and Warnings

2. Access the EDINFO application menu
   d. Open Internet Explorer

   e. Enter the URL https://www.edinfo.state.ia.us

   f. Enter your **Login ID** and **Password** and then click the **Submit** button.

3. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page.

4. Navigate to the Errors/Omissions page
   a. From the import/export page, click on the Errors/Omissions tab or the Errors/Omissions link

5. Check the number and type of Errors and Omissions
   a. Scroll to the middle of the page and Click the Check for Errors/Omissions button

   b. Scroll to the top of the page and look at the Error/Warning Summary. This shows you the number of unresolved errors by type

   c. You can also Click the dropdown arrow on the rule filter and filter by type. The results (error count) will appear just above the detail grid on the left side.

6. Fix Errors
   a. Fix Assignment errors
      i. Click on either the name of the error in the Summary section or use the rule filter to filter on a specific error. The results appear in the grid just under the Rule Filter.

      ii. Click on the mangifying glass under the Actions column for the individual you want to correct.

      iii. If this is an assignment error, the error will appear in yellow.

iv. Click the paper and pencil icon to edit the assignment.

v. Make the appropriate changes.

vi. Click Save

vii. Click Add Assignment to add an assignment to the current position.
(1) Change the school if the assignment is in another building.
(2) Select the Subject Area from the dropdown list
(3) Select the course from the dropdown list
(4) Change shared status if necessary
(5) Enter the number of sections
(6) Check the appropriate grades if required
(7) Click Save

OR

viii. Click Add a Position to add a new postion or a new program using the same Position
(1) Select the Postion from the dropdown list
(2) Select the Program from the dropdown list
(3) Enter the FTE to the nearest hundreth
(4) Change the school if the assignment is in another building
(5) Select the Subject Area from the dropdown list
(6) Select the Course from the dropdown list
(7) Change the Shared Statu sif necessary
(8) Check the appropriate grades if required
(9) Click Save

b. Fix demographic errors
i. Click on either the name of the error in the Summary section or use the rule filter to filter on a specific error. The results appear in the grid just under the Rule Filter.

ii. Click on the paper and pencil icon under the Actions column for the individual you want to courrect

iii. The demographic screen will appear. Make the appropriate changes.

iv. Click the Save and Return to Listing button.

6. Approve Warnings
   a. Approve boxes will appear in the Approve column for warnings or data we would like verified.

   b. Click in the small box to approve/verify warnings.

   c. If you want to hide warnings that have been approved, click in the Hide Approved Warnings box which is located above and to the left of the grid.

7. Send a message to the State.
   a. If you have a licensure issue, you can send a message to the State by Clicking on the magnifying glass beside the person you wish to comment on.

   b. Scroll to the assignment you wish to comment on.

   c. Click on the comment icon

   d. Click in the Add a Comment box and type your message

   e. Click the Add Comment button. Comment is added to the comment box along with who entered the comment and a date/time stamp

   f. Click the Close button

   g. The comment goes into a database that DE and BoEE can access. If they make a comment, the comments will be emailed to the person/persons listed on the District Contact page. If no one is listed, the emails will go to the Superintendent.

   h. Click Return to go back to the Errors/Omissions page

Fall BEDS Staff Collection Training - Exercises

Exercise 9 – Adding a District Contact

Overview

The purpose of this exercise is to demonstrate the steps necessary to add a district contact person to receive emails from the State.

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District Contact page
4) Enter the person you want to receive emails from the State
5) When you will receive emails

Exercises

The following steps outline the tasks you will complete in order to gain experience entering district contact personnel and communicating with BoEE or the Department.

1. Enter the person or persons you want to receive communication from the State.
2. Delete a district contact person
3. Send a message to the State

Exercise 9
Adding District Contacts

1. Access the EDINFO application menu
   g. Open Internet Explorer

   h. Enter the URL https://www.edinfo.state.ia.us

   i. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page.

3. Navigate to the District Contact page
   a. From the Home page, click on the District Contact tab or the District Contact link

4. Enter the person you want to receive email communication from the Department or BoEE regarding licensure issues
   a. Enter the full name of the person you want to receive emails

   b. Enter the email address of the person you want to receive emails

   c. Click the Add Contact button. The persons name and email should appear just under the Current Contacts label.

5. Delete a district contact
   a. Click on the red circle with the X in the middle that appears after the persons email address.

6. Send a messag to the State
   a. Click on the District/Staff tab or the District/Staff link

   b. If you have a licensure issue, you can send a message to the State by Clicking on the magnifying glass beside the person you wish to comment on.

c. Scroll to the assignment you wish to comment on.

d. Click on the comment icon

e. Click in the Add a Comment box and type your message

f. Click the Add Comment button. Comment is added to the comment box along with who entered the comment and a date/time stamp

g. Click the Close button

h. The comment goes into a database that DE and BoEE can access. If they make a comment, the comments will be emailed to the person/persons listed on the District Contact page. If no one is listed, the emails will go to the Superintendent.

Fall BEDS Staff Collection Training - Exercises

Exercise 10 – Filling out the Mentoring and Induction forms

Overview

The purpose of this exercise is to demonstrate the steps necessary to fill out the Mentoring and Induction Forms

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District Contact page
4) Enter the Mentoring Facilitator Contact Information
5) Enter the Eligible Administrators
6) Enter the Eligible Educators

Exercises

The following steps outline the tasks you will complete in order to gain experience entering the information on the Mentoring and Induction forms.

1. Enter the facilitator contact information
2. Enter the eligible administrators
3. Enter the eligible educators
4. Submit the form

Exercise 10
Filling out the Mentoring and Induction forms

1. Access the EDINFO application menu
   j. Open Internet Explorer

   k. Enter the URL https://www.edinfo.state.ia.us

   l. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page.

3. Navigate to the District Contact page
   a. From the Home page, click on the Mentoring tab or the Mentoring link

4. Enter the Facilitator contact information.
   a. Enter the name of your districts Mentoring facilitator in the Contact Name box in the first section of this form.

   b. Enter the email address of your districts Mentoring facilitator in the Contact Email box in the first section of this form.

5. Enter eligible administrators
   a. Enter the number of eligible first year administrators your district will be mentoring in the first semester in the 1st Semester Count box in the section labeled Administrator Mentoring and Induction Program

   b. Enter the number of eligible first year administrators your district will be mentoring in the second semester in the 2nd Semester Count box in the section labeled Administrator Mentoring and Induction Program

6. Enter eligible educators

a. Enter the number of eligible first or second year educators your district will be mentoring in the first semester in the 1st Semester Count box in the section labeled Educator Mentoring and Induction Program

b. Enter the number of eligible first or second year educators your district will be mentoring in the second semester in the 2nd Semester Count box in the section labeled Educator Mentoring and Induction Program

7. Submit the form
   a. After the form has been filled out, click the Submit button

Fall BEDS Staff Collection Training - Exercises

Exercise 11 – District Certification

Overview

The purpose of this exercise is to demonstrate the steps necessary to Certify the Fall BEDS Staff forms

If you have any questions or need assistance, please raise your hand.

Objectives

The following objectives apply to this exercise.

1) Connecting to the website
2) Enter the application
3) Navigate to the District Contact page
4) Check errors by building
5) Check Staff counts and FTE's
6) Certify the forms
7) Uncertify the forms

Exercises

The following steps outline the tasks you will complete in order to gain experience knowing when the forms are ready for certification.

1. Check error count and errors by building
2. Check Staff counts and FTE's for reasonableness
3. Certify the forms
4. Uncertify the forms

Exercise 11
District Certification

1. Access the EDINFO application menu
   m. Open Internet Explorer

   n. Enter the URL https://www.edinfo.state.ia.us

   o. Enter your **Login ID** and **Password** and then click the **Submit** button.

2. Enter the Fall BEDS Staff Application.
   a. Select Fall BEDS Staff from the list of available applications

   b. You should be on the Fall BEDS Staff Collection Home page.

3. Navigate to the Certification page
   a. From the Home page, click on the Certification tab or the Certification link

4. Check error count and errors by building
   a. The section under the red notification bar labeled District is not certified is the status by building. This gives an error count by building and also allows you to view the errors by building. Click on the View link under the View column.

   b. You are now on the Errors/Omissions page which shows the detail of the remaining issues with this particular building.

   c. Review the Errors/Omissions exercise to address the remaining issues.

   d. Click the Certification Page button to go back to the Certification page.

5. Check staff counts and FTE's for reasonableness

   a. Directly to the right of the status section are three blue bars labeled District Licensed Position Summary – Click to Show, District Non-Licnesed Position Summary – Click to Show, and District Program/FTE Summary – Click to Show. Click each of these and review the counts and FTE for each.

6. Certify the forms

a. Once all error counts in the status section are zero you will get the Certify button. First be sure to review the staff counts and FTE for reasonableness. Once you are satisfied, Click the Certify button.

7. Uncertify the forms
   a. If you realise you made a mistake, Click the Uncertify button to uncertify the forms and make the corrections.