Using the MT Edition Value Added for the TEAMS Extract

AIM User Guide

This AIM User Guide explains how to prepare the MT Edition application to extract a "Teacher-Class" file to upload into TEAMS (Terms of Employment, Accreditation and Master Schedule). This guide is designed for schools that <u>do not</u> have an existing student information system.

Districts that do not use a student information system may use the MT Edition Value Added application to store and extract data to submit on TEAMS. TEAMS is OPI's online system used to collect data for school accreditation (aka Annual Data Collection). In the MT Edition Value Added, districts may enter schedules, courses and teachers and assign students to courses. Data may then be extracted in a format suitable for upload into the "Teacher- Class" screen of the TEAMS system.

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FAQ:

1. **What is TEAMS?**

   Terms of Employment, Accreditation and Master Schedule (TEAMS) is a collection that replaced the previous Annual Data Collection (ADC). In TEAMS, districts report courses and teaching assignments at the class level.

2. **What calendar information is required?**

   Districts must identify student enrollment dates and enter a daily schedule so TEAMS can accurately calculate student instruction time.

3. **What information is required for teachers?**

   Teachers must have an SEID (previously known as the Folio Number), an employment record, and an assignment into a school to be attached to the TEAMS extract.

4. **What do I need to know about the courses students are taking?**

   Depending on the certification of the educator, students in grades K-6 generally need to be assigned only to a grade level course. Students taking courses from educators with specialized certifications (e.g., Physical Education teachers) and 7-8 and high school students will need to be assigned to a specific subject area course.

5. **How are students attached to courses with teachers?**

   Teachers are assigned to the courses they teach, and students are placed on a roster for that course. The TEAMS extract only records the number of students in a course, but not names of students.

TEAMS - Terms of Employment, Accreditation, and Master Schedule

This collection will fulfill a number of new and anticipated reporting requirements in addition to replacing the existing Annual Data Collection (ADC).

- The Terms of Employment collection reports the employment status of each employee of the district, including position code, FTE portion, base salary, employment start and end dates, total annual days and hours, Full-time/Part-time status, and permanent/temporary status.
- The Accreditation component collects information about the schools' compliance with the Montana School Accreditation Standards.
- The Teacher-Class collection includes information on course catalog and teaching assignments at the class level.

This guide will specifically address the Accreditation and Teacher-Class portions of the TEAMS project. More information on the TEAMS project may be found on the [OPI webpage](#).

MT Edition Calendars

For general AIM reporting, districts are required to create calendars with basic district information. For the purposes of the TEAMS collection, districts must also enter **Terms**, **Periods** and **Days**.
Path: Index> System Administration> Calendar> Calendar

Terms

Terms define the periods of time in which students are enrolled in courses. If districts only have full-year courses, only a full-year term is required. If students rotate courses on either a quarter, trimester or semester schedule, click **New Term Schedule/Terms** to define those terms.

1. Enter the **Start Date** and **End Date** for each term as determined by your school/district.
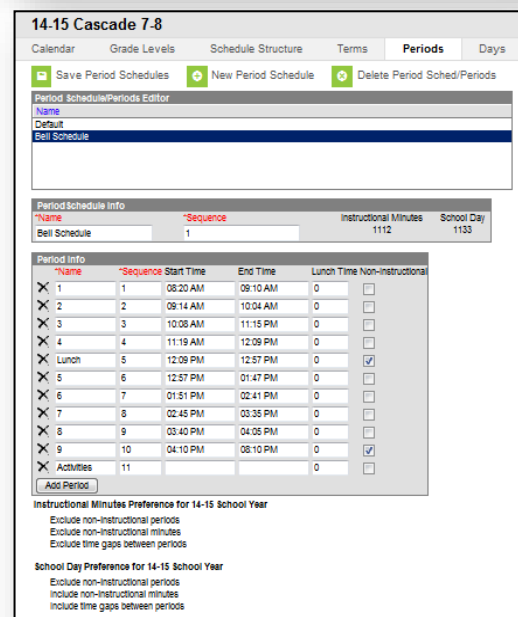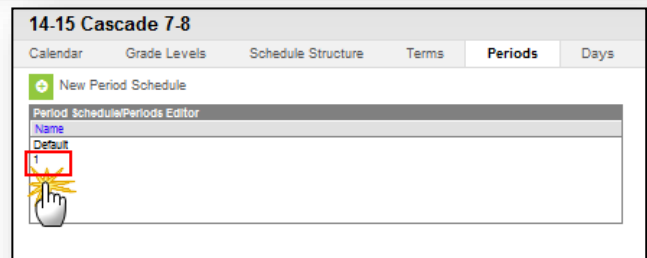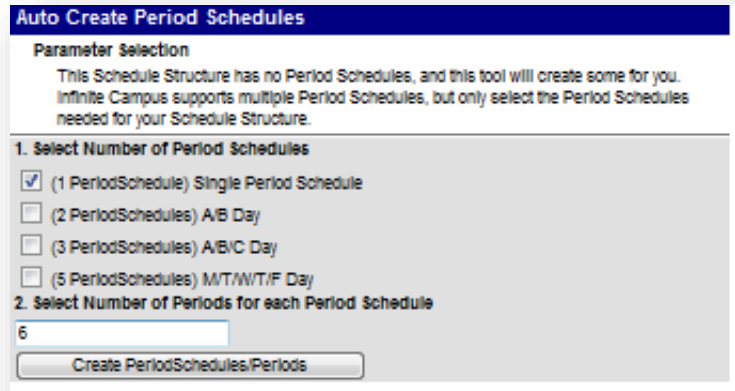2. Click **Save**.

Periods

Periods define the time that students spend in courses. If the school is only recording time in one course (e.g., 1st grade or 2nd grade, etc.), the district only needs to create one period. (use default for this.) If students transfer from one course to another (e.g., high school or middle school) the periods need to reflect that movement between courses.

NOTE: If MT Edition will be used to record attendance, periods may be set up based on times attendance will be taken (e.g., before and after lunch).

1. Click **New Period Schedule under the Periods** tab to add a schedule.
2. Under **Select Number of Period Schedules**: For each schedule, you must enter a list of periods and times in the next step, so use the least number of schedules as possible to reflect the school's activities accurately. Check the box that applies.
3. Under **Select Number of Periods for each Period Schedule.** Enter the number of periods for the schedule being added. You can add more in the next step, if needed.
4. Click **Create Period Schedules/Periods**.
5. To list the period information, click the schedule just added.
6. Enter a schedule **Name** *(e.g., Bell Schedule, Early Out Days, etc.), if desired.*
7. Enter **Start time** and **End Time** for each period.
8. Check **Non-Instructional** for every period that is not pupil instruction time.
9. Click **Save Period Schedules**.

NOTE: After saving, the *Instructional Minutes* and *School Day* minutes are calculated, as shown on the Period Schedule Info. Days

Days

The **Days** tab is used to identify the days on which students receive instruction. Holidays, early release days, and teacher in-service days are included. Excluding or shortening days reduces the total number of instructional minutes for a course.

First, set the range for school days. This should include your PIR days.

1. On the **Days** tab, click **Day Reset.**
2. Enter the *Start Date* and the *End Date* (these dates are the dates of instruction beginning and ending for the school year and are not the fiscal school year dates.)
3. If school is not held on Friday, un-check Friday.
4. Click **Create Days**.
5. Next, adjust for days school is not held. Select a date by clicking the blue number from the large calendar. For PIR days, uncheck *Instruction* and *Attendance*. For holidays or other non- school days, uncheck *School Day*, *Instruction* and *Attendance*. For shortened days, enter the *Start Time* and *End Time*.
6. To enter *Day Events*, click **Add Day Event**. Select the *Type* from the drop-down menu.
7. Click *Save Day/Day Events*. Repeat for all altered instruction days.

Teachers

To include a teacher and/or para- professional responsible for student instruction in TEAMS, add them to the MT Edition application using the following steps.

Add Staff

1. From the **Index** tab, select **Census**.
2. Select **Staff Locator**.
3. Enter the teacher's *Last Name*, *First Name* and *Gender*.
4. Click **Search**.
5. The search results display any teachers entered into another District or MT Edition. Verify the teacher's demographic information and select the corresponding match.

NOTE: Hovering over the name of the teacher will show the last district of employment – the same as the student locator does for student.

6. If there is no match for the teacher being entered, click *Create New District Staff*.

7. Required fields are: *Last Name*, *First Name*, *Gender and Employment Start Date.* However, for the TEAMS extract, the teacher's SEID (Folio Number) must be entered in the *Staff State ID* field.

8. Enter the required data and click *Save*.

<mark>NOTE:</mark> The *Staff State ID* number was previously an auto-generated number. The district may need to replace the auto-generated number with the correct SEID number.

The teacher's SEID (Folio Number) may be found on the teaching certificate or located using the [Montana State Educator Information System (MSEIS) Educator Search](#).

Indicate District Assignments

1. Select the **District Assignments** tab and click *New*.
2. Select the *School*, enter a *Start Date* and check the box for *Teacher* (if the teacher will be a **Team Member** for Special Education students, also check *Special Ed* and/or *Advisor*). Click *Save*.
3. If a teacher is assigned to multiple schools, create an assignment for each school.
4. The teacher's SEID (Folio Number) may be found on the teaching certificate or located using the **Montana State Educator Information System (MSEIS) Educator Search**.
5. Enter any of the known elements of the teacher's demographics and/or license information and click **Search Educators**.
6. Click **View** to see the specific license history and information for the selected teacher.
7. The SEID is located at the top of the page, under the teacher's name.
   NOTE: Information shown here was obtained from the public site. Districts have access to the secure MSEIS/TEAMS site.
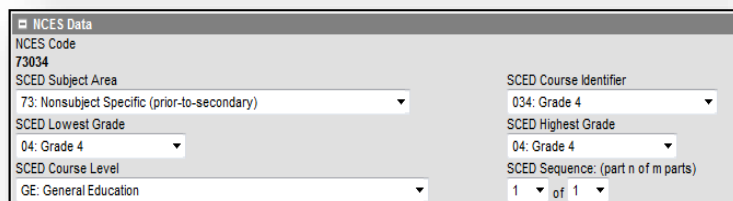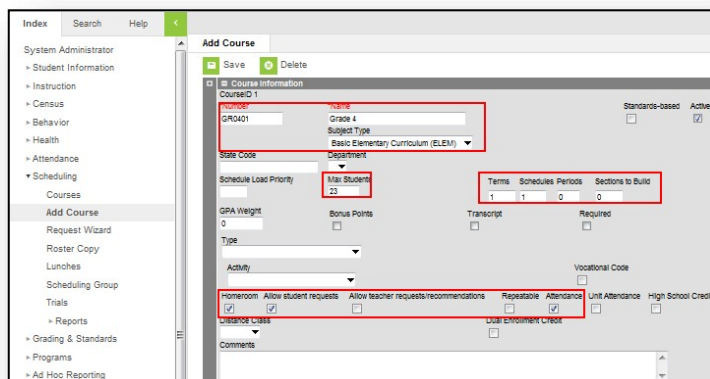
COURSES

Courses are entered into MT Edition Value Added depending on the certification of the teacher and the grade level of the student. For elementary students taught by K-8 certified elementary teachers, only a "grade level" course (e.g., 1st grade, 2nd grade, 3rd grade) is required. Students taught by a specialist need to be enrolled into their specified courses (typically middle and/or high school students). Districts will also need to account for specialists who supplement a student's education (e.g., K-6 physical education teachers).

General Elementary Courses

1. Select the current **Year**, *School* and/or **Calendar**.
2. From the **Index**, select **Scheduling** and select **Add Course**.
3. Enter *Number* and *Name* (district specified), *Max Students* (set at a higher number than would ever be enrolled in the course), *Terms* (same as number of terms entered on calendar), *Schedules* (typically 1), *Periods* (number of periods for course), and check *Allow Student Requests*.
4. **OPTIONAL:** Check *Homeroom* and *Attendance* as appropriate – if using the MT Edition Value Added application to take attendance.
5. Under **NCES Data**, choose *SCED Subject Area*, *SCED Course Identifier*, *SCED Lowest Grade*, *SCED Highest Grade*, *SCED Course Level* and *SCED Sequence* (1 of 1, unless splitting a full year course into semesters – 1 of 2 – or trimesters – 1 of 3). The NCES code auto-fills after this identifying data is entered.
6. Click *Save* (top of screen).

NOTE: Elementary courses are numbered 51 to 73 and contain the notation (prior-to- secondary).

For specific information on K-12 Course Codes and course mapping, see the OPI TEAMS help webpage.

Middle/High School Courses

1. Select the current *Year*, **School** and/or **Calendar**.
2. From the **Index**, select **Scheduling** and select **Add Course**.
3. Enter *Number* and *Name* (district specified), *Max Students* (set at a higher number than would ever be enrolled in the course), *Terms* (same as number of terms entered on calendar), *Schedules* (typically 1), *Periods* (number of periods for course), and check *Allow Student Requests*.
4. If the course is *Distance Learning* or *Dual Enrollment*, check the appropriate box.
5. If the course is part of an Alternative Education Program for At Risk Youth, *check* the **Alternative Ed Program** box under **Custom Data Elements** at the bottom of the **Course** tab.
6. **OPTIONAL:** If using the MT Edition application to keep attendance, check *Homeroom* and *Attendance* as appropriate.
7. **Elementary (Grades 5-8):** Under **NCES Data**, choose *SCED Subject Area*, *SCED Course Identifier*, *SCED Lowest Grade*, *SCED Highest Grade*, *SCED Course Level* and *SCED Sequence* (1 of 1, unless splitting a full year course into semesters – 1 of 2 – or trimesters –1 of 3).
8. Click *Save*.
   NOTE: Elementary courses are numbered 51 to 73 and contain the notation (prior- to-secondary). For specific information on K-12 Course Codes and course mapping, see the OPI TEAMS help webpage.
9. **High School (Grades 9-12):** Under **NCES Data**, choose *SCED Subject Area*, *SCED Course Identifier*, *SCED Lowest Grade, SCED Highest Grade, SCED Available Credit*, *SCED Course Level* and *SCED Sequence* (1 of 1, unless splitting a full year course into semesters – 1 of 2 – or trimesters – 1 of 3).
10. Click *Save*.

NOTE: Secondary courses are numbered 01 to 22. For specific information on K-12 Course Codes and course mapping, see the OPI TEAMS help webpage.

Courses by Specialists

If the K-6 (or K-8) curriculum uses specialists in courses such as Music, Art, etc., enter those courses separately from the grade/classroom courses (e.g., 1st grade, 4th grade, etc.).

1. Select the current **Year**, **School** and/or **Calendar**.
2. From the **Index**, select **Scheduling** and select **Add Course**.
3. Enter *Number* and *Name* (district specified), *Subject Type*, *Terms* (same as number of terms entered on calendar), *Schedules* (typically 1), and *Periods* (number of periods for course).
4. **OPTIONAL:** Check *Homeroom*, *Allow Requests* and *Attendance* as appropriate.
5. **Elementary (Grades K-6 or K-8):** Under **NCES Data**, choose *SCED Subject Area*, *SCED Course Identifier*, *SCED Lowest Grade*, *SCED Highest Grade*, *SCED Course Level* and *SCED Sequence* (1 of 1, unless splitting a full year course into semesters – 1 of 2 – or trimesters – 1 of 3).
6. Click **Save.**

NOTE: Elementary courses are numbered 51 to 73 and contain the notation (prior to secondary). For specific information on K-12 Course Codes and course mapping, see the OPI TEAMS help webpage.

Creating Sections

Sections define the time period that courses occur and link teachers and students to courses.

1. Choose the current **Year**, **School** and/or **Calendar**.
2. From the **Search** tab, *Search for Course/Section*. Click **Go**.
3. Click on a course.
4. Click the **Sections** tab.
5. Click **Add a Section**.
6. Enter *Section Number*.
7. Select *Session Type*.
8. The *Session Number* corresponds to the *Session Type*. For example, if *Session Type* is Quarter, the *Session Number* for this course will be 1, 2, 3, or 4 for 1st quarter, 2nd quarter, etc. For a full year course there is only one *Session Number*.
9. Check the boxes that correspond to the time the course is offered. If a course is offered more than once per day, create a separate section for each time the course is offered.
10. Click **Create Section**.
11. Click the **Staff History** tab.
12. Select **New Primary Teacher**.
13. Select a name from the **Name** dropdown list.
14. Choose a **Role**. The teacher selected as *Primary Teacher* should have a *Role* of *00: Teacher of Record* and hold an appropriate MT certification to teach the selected course. Only one *Primary Teacher* may be identified for each course.
15. Click **Save**.
    NOTE: For distance learning courses, the district must have a *Facilitator* assigned to the course under *Primary Teacher*. The teacher holding the proper endorsement for the course should be identified as the *Primary Teacher*.
16. If another teacher will be sharing the teaching responsibilities with the *Primary Teacher*, select **New Teacher**.

17. Choose the name of the second teacher from the dropdown list and choose a **Role**.

18. Click **Save**.

NOTE: The teacher holding the proper endorsement for the course should be identified as the *Primary Teacher*. If another staff member will be sharing the teaching responsibilities (e.g., a para-educator) with the *Primary Teacher*, select **New Section Staff**.

19. Choose the name of the staff member from the dropdown list and choose a **Role.**

20. Click **Save**.

CREATING ROSTERS

TEAMS will derive an enrollment count from student rosters entered in MT Edition and uploaded into the TEAMS Teacher-Class data collection.

After searching for the Course/Section (see page 12), *select* the **Roster Setup** tab.

Students may be selected in multiple ways:

- **Copy student from this section:** – Select a section for which students are already enrolled, and the screen will copy that list of students to this section – helpful if there are AM and PM sections of a course or all students in a grade are taking the same courses. NOTE: When using this option, students don't appear under *Current Roster* until **Save Student List and/or Copy Section** is selected.

- **Show Students in this grade only:** – Select one grade level to display a list of students in the specified grade level – useful for enrolling students into a course that only applies to one grade level. Click student names to add to the *Current Roster*. Click ***Save Student List and/or Copy Section*** when all students have been added.

- **All Students:** Select students from the list of all enrolled students. Click student names to add to the *Current Roster*. Click ***Save Student List and/or Copy Section*** when all students have been added.

Students may also be added to classes individually.

This method is recommended for enrolling students after the first of the year and for recording course changes.

- To enable this functionality for a course, check *Allow student requests* on the **Course** tab.
- Navigate to the student's **Schedule** tab: (**Path**: **Index/Student Information/General**).

- Click the **Schedule** tab.
- Click **Walk-in Scheduler**.
- Click the **EMPTY** link on the student's schedule for the period you want to schedule.   A list of courses meeting at that time will appear in a **Section Search** to the right of the schedule.
- Click the section below the course to add it to the student's schedule.

Course Changes

When a student moves from one course to another, <u>do not</u> deleted the course from the student's schedule. As with an enrollment, end date the first course using the Roster Update tool by clicking on the course, then add the new course.
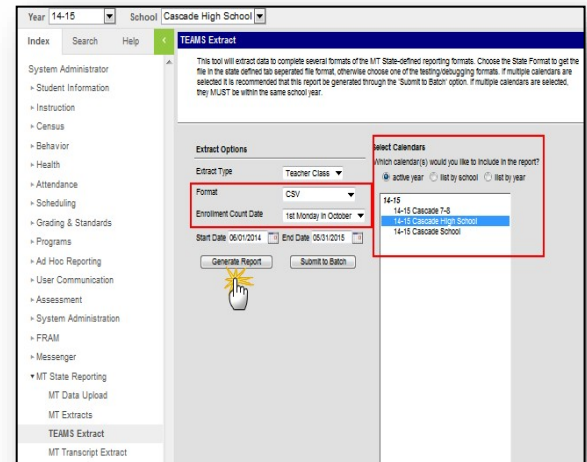
TEAMS EXTRACT

NOTE: TEAMS uploads are done by school. A separate upload file should be created for each school (but may include multiple calendars for that school.)
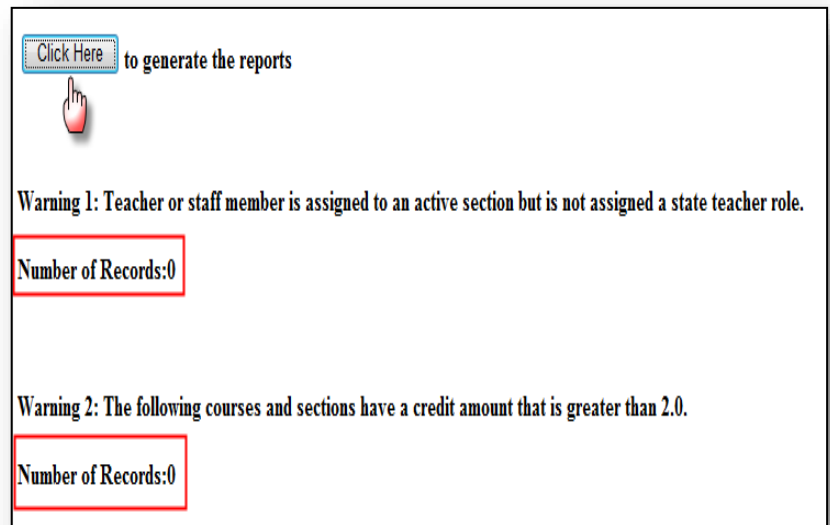
1. From the **Index**, select **MT State Reporting.**
2. Select **TEAMS Extract**.
3. Under **Format**, select *CSV*.
4. Choose an **Enrollment Count Date.** (TEAMS uses the October Count Date)
5. Select one or more *Calendars*.
6. Click **Generate Report**.

NOTE: Prior to generating the report, a screen will *open showing two warnings:*

- **Warning 1: Teacher or staff member is assigned to an active section but is not assigned a state teacher role** – need to verify that each section has an assigned Teacher of Record.

- **Warning 2: The following courses and sections have a credit amount that is greater than 2.0.**
- If both warnings show *Number of Records: 0* **OR** all issues have been resolved, click **Click Here** to generate report.

7. Verify that data is entered into all fields.
8. If data is missing, check the steps above to correct the missing field.
9. If all data is entered and accurate, the file is ready for upload to TEAMS: TEAMS Login Screen
10. Follow the instructions provided in the TEAMS OPI website.

NOTE: If you want to make changes in the file before uploading into TEAMS, you must **import** this file into Excel (i.e., not just open the file in Excel) to make any edits prior to uploading into TEAMS. The instructions for doing this can be found on the TEAMS OPI website. When done making edits, click "Save As…" and save it as a CSV file, which can be uploaded it into TEAMS.

For more information, contact the AIM Help Desk at 1- 877-464-6681 or

Submit an AIM Help Desk Ticket