DISTRICT STAFF CHECKLIST

This checklist and procedures must be completed before the start of the school year and can be used to maintain staff records throughout the school year.

Staff Records

Districts must enter all staff members employed by the district and certain contracted employees in Infinite Campus. This includes teachers and some professional staff that are then associated with courses.

The requirements for entering staff are dependent upon the staff member's role in the districts. Refer to the AIM webpage for specific requirements for the staff member's State assignment code.

Add Staff Using Staff Locator

PATH: *Census>Staff>Staff Locator Wizard*

The Staff Locator must be used to enter any adult in Infinite Campus – including parents, household contacts, and staff.

- Enter the person's Last Name, First Name and Gender.
- Click Search.
- Review the list of results to see if there's a match. The best indicator is a match on State Staff ID (SEID), but birthdate, name, or previous district of employment or enrollment (for former students) may also be used. To view association with another district, hover over the search result.
  - If there's a clear match, click the staff member's name.
  - If there's not a clear match, Create New District Staff. If a match is expected, but not found or uncertain, contact the AIM Unit for assistance.
  - Last Name, First Name, Gender, Staff State ID, and Employment Information Start Date (District Employment Start Date) are required. *Birth Date is recommended, but not required.*
- Click Save.

AIM Unit Contact Information
(406) 444-3800
opiaimhelp@mt.gov

Add District Assignment(s)

PATH: *Census>People>Demographics and Census>Staff>District Assignments*

- District Assignments – record of a specific role within the district.
  - Add a District Assignment for each role the staff member has within the school or district.
  - Fields that must be completed with a new District Assignment include:
    - School – Some State Assignment Codes require assignment to a specific school, and some are at the District Level. Districts with more than one school within their LE may see District Level EL, District Level HS, or District Level K-12 in the dropdown list.
    - Start Date
    - FTE – between 0.001 and 1 (Sum of all assignments must not be greater than 1.0 in most instances.) Some state assignment codes do not require FTE be entered.
    - State Assignment Code
    - Teacher – Required for staff to be assigned to courses.
    - Special Ed – Required for staff to be assigned to an IEP and for contractors.
    - Supervisor – Required for staff to be assigned as a supervisor for paraprofessionals and Special Ed staff.
    - MT SPED Level – Required only for Special Ed staff.
    - MT Titles – Used to indicate coordinators, contractors, cooperative staff, and individuals excluded from State reporting (e.g. school board members).
    - Supervisors – Required for paraprofessionals and Special Ed staff (visible after initially saving the record).

File Upload

PATH: *Reporting>MT State Reporting>MT Data Upload*

Districts that use a 3rd party Student Information System (SIS) may use the file upload process to enter staff. The Terms of Employment file outlines the requirements for the upload.

Extract the upload file from the district's SIS or create a text, tab delimited file from the Terms of Employment file upload template. Instructions for using the templates are embedded in the template file.

- Select the Import Type, the Work to Perform and choose the file to be uploaded.
- Click Submit to Batch.

- Review the Validate and Test results file located in the Batch Queue List located at the bottom of the page to identify and correct import errors and/or warnings.
- Select Refresh on the Batch Queue to retrieve the latest status of the Batch.
- When the Batch has completed processing, select "Get the report" to retrieve the Import Results Summary file.

- Credentials and Contractors must be entered manually following the steps below.

Credentials

PATH: *Census>Staff>Credentials*

District staff requiring professional licensure, Special Education staff, and paraprofessionals require additional data entry on the Credentials tab. Follow these steps to enter Credentials:

- Click New Credential.
- Select Credential Type (Highly Qualified for Special Education and paraprofessionals, Licensure/Certification for professional licensure).
    - Highly Qualified – Enter Start Date, Subject Type (only required for SPED), and Certification Status or Paraprofessional Qualification.
        - Only update Highly Qualified if there is a change, then end and create a new record.
    - Licensure/Certification – Enter Start Date (license issue date), End Date (license expiration date), SPED Related Services Credential or Health License, License Number, and License/Certification Type.
    - Click Save.

Note: Professional license data may be found on the [Montana Department of Labor](#) website.
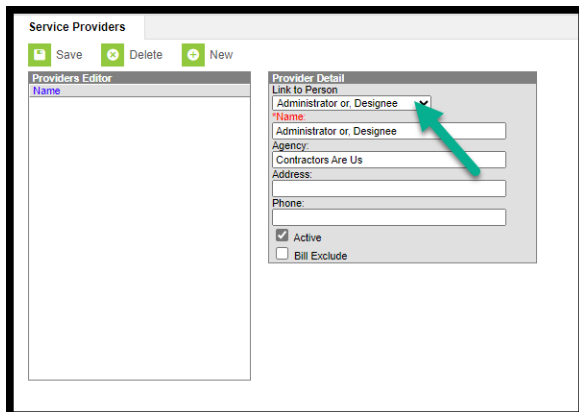
Contractors

PATH: *Student Information>Special Ed Administration>Special Ed Service Provider Setup*

Contractors identified on the District Assignment tab (must have MT Title designation as Contractor and have Special Ed box checked) require additional information entered about their employer. The additional information is entered on the Special Ed Service Provider tab.

- Click New.
- Use Link to Person to select the Contractor.
- Enter Agency (employer).
    - If the person is self-employed, enter the person's first and last name in the Agency field.
- Click Save.

Note: A person will not show up in the dropdown list unless Special Ed is checked on the District Assignments tab.

Modifying Staff

PATH: *Census>People>Demographics and Census>Staff>District Employment & District Assignments*

Existing staff members should have essential data elements entered. The key identifier for staff is the SEID number – assigned to the individual by the OPI in the Teach Montana (TMT) system. The SEID number is entered into the State Staff ID field. This is the key identifier for staff coming from other districts. Please review all existing staff members and verify that the SEID number is entered and accurate.

- District Employment – record of continuous employment with the district.
  - Must be entered for each staff member.
  - For existing staff it's not necessary to have a historical start date, but staff members employed on or after 7/1/2023 should have an accurate employment start date.
  - When a staff member's employment ends, enter an End Date in the District Employment record and click OK to end all open District Assignments.
- District Assignments – record of a specific role within the district.
  - When a staff member's assignment or role within the district changes, and the staff member is still employed in a different role, enter an End Date for the current assignment and create a new District Assignment.
  - Changes that must be documented with a new District Assignment include:
    - Start Date
    - FTE – between 0.001 and 1 (Sum of all assignments must not be greater than 1.0 in most instances.) Some state assignment codes do not require FTE be entered.
    - State Assignment Code
    - Teacher – Required for staff to be assigned to courses.
    - Special Ed – Required for staff to be assigned to an IEP and for contractors.
    - Supervisor – Required for staff to be assigned as a supervisor for paraprofessionals and Special Ed staff.
    - MT SPED Level – Required only for Special Ed staff.
    - MT Titles – Used to indicate coordinators, contractors, cooperative staff, and individuals excluded from State reporting (e.g. school board members).
    - Supervisors – Required for paraprofessionals and Special Ed staff (visible after initially saving the record).
- Credentials and Contractors – modify using the steps above.