



## END OF YEAR PERSONNEL CERTIFICATION

Use this guide to create and maintain staff in Infinite Campus. Any staff member employed or paid in the 2025-26 school year (July 1, 2025 through June 30, 2026) should be included in the End of Year Personnel Certification, as well as contracted or consortium staff required for Accreditation or Special Education. The requirements for entering staff are dependent upon the staff member's role in the districts. Refer to the [EDUCATE 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) and License Number (State Staff ID) are required. *Birth Date is recommended.*
- Click Save.

Staff Locator Wizard ☆

**Staff Locator**

Search for a staff already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. To search, you must enter the staff member's Staff State ID, or full legal Last Name, First Name, and Gender. Hover the cursor over results or click the Create New Staff button.

Last Name	Teacher	Name	Staff State ID	Gender	Birth Date	%
First Name	High School	No matches found				
Gender	Male					
Birth Date						
Middle Name						
SSN #						
Staff State ID						

Search -->

Create New District Staff -->

**Employment Information**

Start Date	End Date
8/26/2025	
Teaching Start Year	Teaching Years Modifier
License Number	FTE Percent (whole number 0-100)
12345678	
Seniority	Education

### EDUCATE Unit Contact Information

(406) 444-3800

[opiainhelp@mt.gov](mailto:opiainhelp@mt.gov)

May 2026

## 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. Use the [State Assignment Code Matrix](#) for information specific to each Assignment.
  - 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 consortium providers or 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.
    - CTAE Extended Contract Days – For CTE teachers.
    - MT Titles – Used to indicate coordinators, consortium providers, 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).

**Employment Assignment Information**

School Highland Park School		Department ▼	
*Start Date 07/01/2025	End Date ▼	Title ▼	CTAE Extended Contract Days 0
Type ▼	FTE of Assignment 1	State Assignment Code TC03:Teacher - Special Education ▼	
Teacher <input checked="" type="checkbox"/>	Special Ed <input checked="" type="checkbox"/>	Program <input type="checkbox"/>	Behavior Admin <input type="checkbox"/>
Advisor <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Counselor <input type="checkbox"/>	Foodservice <input type="checkbox"/>
Activity Staff <input type="checkbox"/>	Activity Preapproval <input type="checkbox"/>	MT SPED Level 6 and up (Kindergarten to grade 12) ▼	Health <input type="checkbox"/>
Supervisors ▼	External LMS Exclude <input type="checkbox"/>	MT Titles Consortium Provider Contractor Foster Care Point of Contact Gifted and Talented Coordinator Homeless Liaison Indian Education for All Coordinator Itinerant Employee Not State Reported	Behavior Response Approver <input type="checkbox"/>
			Response to Intervention <input type="checkbox"/>
			Exclude Behavior Referral <input type="checkbox"/>
			Self Service Approver <input type="checkbox"/>
			FRAM Processor <input type="checkbox"/>

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## File Upload

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

Districts that use a 3<sup>rd</sup> 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.

The screenshot shows a web interface for file uploads. It features two main sections: 'Import Data' and 'Retrieve New Student State ID File'. The 'Import Data' section includes dropdown menus for 'Import Type' and 'Work to Perform', a 'Choose File' button, and a 'Submit to Batch' button. Below this is a paragraph of instructions and a red warning: 'THIS PROCESS IS NOT COMPLETE UNTIL a Batch Resync is triggered.' The 'Retrieve New Student State ID File' section has a dropdown menu, 'Refresh State ID File', and 'Generate' buttons, followed by another paragraph of instructions. At the bottom, there is a 'Refresh' button, a 'Show top 50' dropdown, and a date range filter for tasks submitted between 07/30/2024 and 08/06/2024. Below these controls is a table titled 'Batch Queue List' with columns for 'Queued Time', 'Report Title', 'Status', and 'Download'.

Import Data

\*Import Type

\*Work to Perform

\*File  No file chosen

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.

**THIS PROCESS IS NOT COMPLETE UNTIL a Batch Resync is triggered.**  
New Look: *System Settings > Data Interchange Administration > Resync State Data - Batch*  
Old Look: *System Administration > Data Utilities > Resync State Data*

Retrieve New Student State ID File

For Student Demographic Uploads ONLY: Review New Student State ID File to ensure Student State IDs have been provided for students who previously did not have one. After the Import Results have been reviewed, please click the Refresh State ID File button and select the New Student State ID file that corresponds to the date/time the Import completed processing. Click Generate to retrieve the new Student State ID file.

Show top 50 tasks submitted between 07/30/2024 and 08/06/2024

Batch Queue List			
Queued Time	Report Title	Status	Download

## 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.

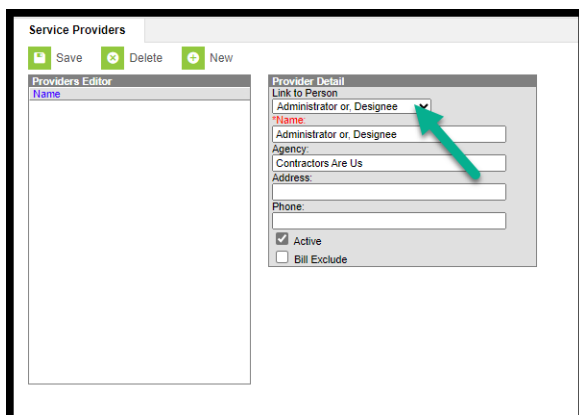
## Contractors and Consortium Providers

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

Contractors and Consortium Providers identified on the District Assignment tab (must have MT Title designation as Contractor or Consortium Provider 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 or Consortium Provider.
- 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.



The screenshot shows a web application window titled "Service Providers". At the top, there are three buttons: "Save", "Delete", and "New". Below these is a "Providers Editor" section with a "Name" field. To the right is a "Provider Detail" form. The "Link to Person" dropdown menu is highlighted with a green arrow. Below it are fields for "Name", "Administrator or Designee", "Agency", "Contractors Are Us", "Address", and "Phone". At the bottom of the form, there are two checkboxes: "Active" (checked) and "Bill Exclude" (unchecked).

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## 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 on the Demographics page and in the District Employment record under License Number. 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, including contractors.
  - 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, except in rare cases). Some state assignment codes do not require FTE be entered (and FTE should NOT be entered for these positions).
    - State Assignment Code – a code that reflects the duties of the individual employee.
    - 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.
    - CTAE Extended Contract Days – for CTE teachers who teach outside of their regular teaching contract.
    - MT SPED Level – Required only for Special Ed staff.
    - MT Titles – Used to indicate coordinators, contractors, consortium providers, 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 or Consortium Providers – modify using the steps above.

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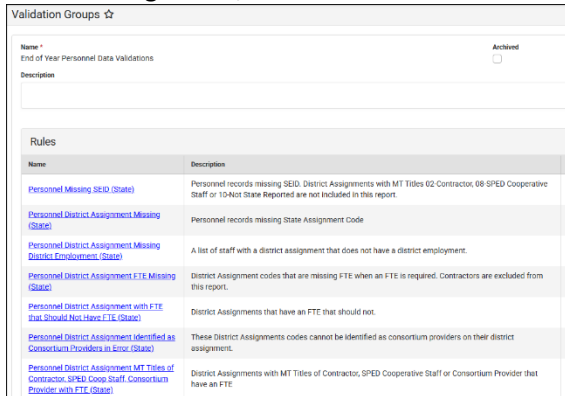
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May 2026

## VALIDATE DATA

PATH: Reporting>Data Validation>Validation Groups OR Data Validation Reports

Search for “End of Year Personnel”. Select the End of Year Personnel Validation Group or Validation Report (to add a Validation Group to the list of Validation Reports, assign the Validation Group to one or more user groups). This group contains the following reports regarding SEID, District Employment, District Assignment, etc.



Name	Description
Personnel Missing SEID (State)	Personnel records missing SEID. District Assignments with MT Titles 02 Contractor, 08 SPED Cooperative Staff or 10-Not State Reported are not included in this report.
Personnel District Assignment Missing (State)	Personnel records missing State Assignment Code.
Personnel District Assignment Missing (District Employment) (State)	A list of staff with a district assignment that does not have a district employment.
Personnel District Assignment FTE Missing (State)	District Assignment codes that are missing FTE when an FTE is required. Contractors are excluded from this report.
Personnel District Assignment with FTE that Should Not Have FTE (State)	District Assignments that have an FTE that should not.
Personnel District Assignment Identified as Consortium Providers in Error (State)	These District Assignments codes cannot be identified as consortium providers on their district assignment.
Personnel District Assignment MT Titles of Contractor, SPED Coop Staff, Consortium Provider with FTE (State)	District Assignments with MT Titles of Contractor, SPED Cooperative Staff or Consortium Provider that have an FTE.

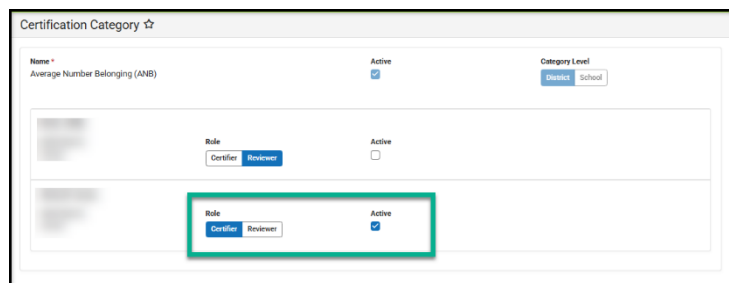
## Data Certification

PATH: Reporting>Data Certification>Certification Category AND Certification Event

Follow these steps to complete data certification.

### Certification Category

1. Select a Certification Category.
2. Current certifier has the Role of Certifier and Active is checked (recommend one certifier per certification category).
3. To remove a Certifier, un-check Active (it is recommended to change role from Certifier to Reviewer).
4. To change from Active Certifier to Active Reviewer (or vice-versa), click Role (blue highlight is selected Role).
5. To add a new Certifier, click Add Member.
  - a. Enter Staff Name or Staff State ID (SEID).
  - b. Click Name, choose Role, and select Active.
  - c. Click Save.



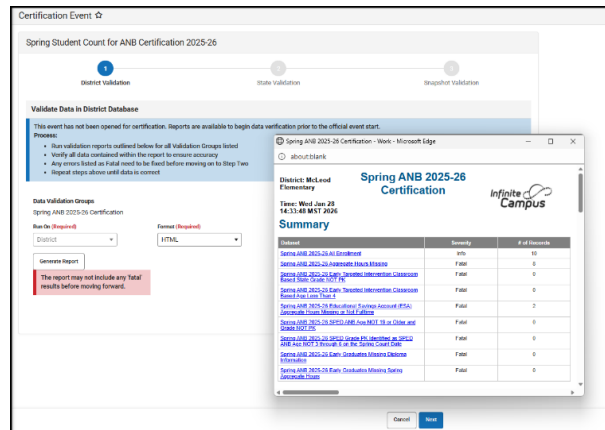
The screenshot shows the 'Certification Category' interface. At the top, there is a 'Name' field with the value 'Average Number Belonging (ANB)' and an 'Active' checkbox that is checked. Below this, there are two rows of controls. The first row shows a 'Role' dropdown menu with 'Certifier' selected and highlighted in blue, and an 'Active' checkbox that is unchecked. The second row shows a 'Role' dropdown menu with 'Reviewer' selected and highlighted in blue, and an 'Active' checkbox that is checked. A green box highlights the 'Reviewer' role and its 'Active' checkbox.

## Certification Event

Districts must validate their data at the District, then the State – before taking a snapshot and completing data certification. Click Start Certification to begin the process.

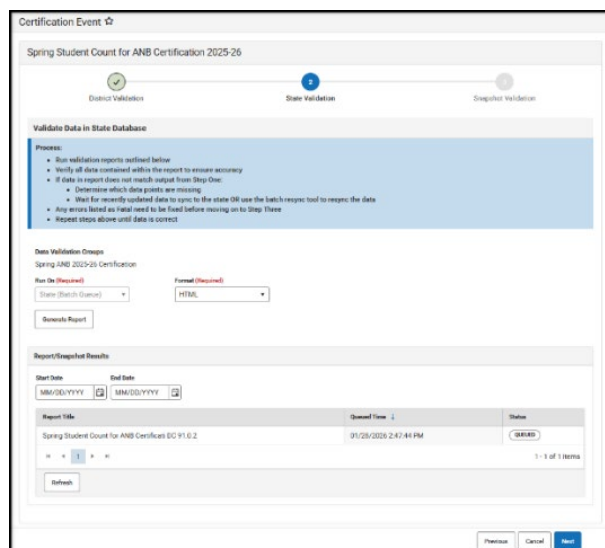
### Step 1: District Validation

Click Generate Report to run the Certification validation at the District. The state identifies errors that will prevent a district from certifying. If there are errors on the District Validation you will not be able to continue with Certification. Clear the errors, then re-run the District report. Once the report is clear, continue to Step 2.



### Step 2: State Validation

Click Generate Report to run the Certification validation at the State. The results will queue in the Report/Snapshot Results. Click Refresh until the report Status shows Completed. Click the Report Title to review results. If there are errors on this report, data is not fully synced. Return to the Resync Data step above and complete a full data resync. Once that step is completed, start with Step 1 again. Once the State Validation is clear, continue to Step 3.



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### Step 3: Snapshot Validation

Click Take Snapshot to create a district snapshot. The results will be generated in the Report/Snapshot Results table below. Open the snapshot to review data. If the snapshot is accurate, click Next to continue to Step 4.

Spring Student Count for ANB Certification 2025-26

Progress: District Validation (Completed), State Validation (Completed), Snapshot Validation (Current)

**Validate Data in Snapshot**

Process:

- Click Take Snapshot
- Refresh snapshot queue until Complete - then click item to view report
- Verify all data contained within the snapshot to ensure accuracy
- If data in report does not match output from Steps One and Two, repeat steps and then Retake Snapshot and review new snapshot
- Repeat steps above until data is correct

State Snapshot Options

State Snapshot Period: **Required!**

HTML: [Dropdown]

No snapshot data available

**Take Snapshot**

Report/Snapshot Results

Start Date: MM/DD/YYYY [Calendar] End Date: MM/DD/YYYY [Calendar]

Report Title	Queue Time	Status
No records available.		

0 of 0 items

Refresh

### Step 4: Certify and Submit

Review Steps 1-3 are completed.

When satisfied with the results of the snapshot created, click Submit Certification to State.

Certification Event

Spring Student Count for ANB Certification 2025-26

Progress: District Validation (Completed), State Validation (Completed), Snapshot Validation (Completed), Certify and Submit (Current)

**Certify and Submit to State**

Process:

- Verify that all items below show Completed
- Click Submit Certification to State

VALIDATION TYPE	STATUS
District Validation	COMPLETED
State Validation	COMPLETED
Snapshot Validation	COMPLETED

Previous Cancel **Submit Certification to State**