

END OF YEAR PERSONNEL COLLECTION CHECKLIST

Must be completed after the last day of school and certified no later than Friday, June 21, 2024. Corrections may be requested through June 30, 2024

The End of Year Personnel Collection replaced the Compensation Expenditure TOE in TEAMS. District staff employed from July 1, 2023, through June 30, 2024, must be included in this certification. Only staff included in this certification will be available for selection in the MAEFAIRS Compensation Expenditure Report.

STEP ONE: IDENTIFY A CERTIFIER

End of Year Attendance Collection Setup PATH (OL): Data Integrity Tools>Data Certification>Setup PATH (NL): Reporting>Data Certification>Type Membership Setup

- 1. Identify a Certifier for the End of Year Personnel (Comp. Expenditure) Collection Type: *Personnel Reporting Data*.
- 2. To remove a Certifier: Select the Certifier. Uncheck Active.
- 3. To modify a Certifier: Select the Certifier. Toggle between Primary and Secondary.

*It is recommended that a district have only one Primary Certifier. If more than one Primary Certifier is indicated, all Primary Certifiers must certify before a collection is considered "certified".

STEP TWO A: ENTER STAFF

PATH (OL): Census>People/Staff Locator PATH (NL): Census>Staff

1. End Employment: If employment ends in a district, enter End Date in the District Employment Record. When saving the record, there will be an option to end all open District Assignments.

Do you want all open assi	gnments ended?	,	2024 A 💙			
Yes No	Cancel	olds	Relationships	Errolments	District Employment	District Assignments
Americaning page 1 of 11 americaning Carame Mandig Carame Mandigs, Latala materials, Andrea materials, Andrea materials, Andrea Materials, Materials Materials, Materials Materials, Materials Materials, Materials Materials, Materials Materials, Materials Materials, Materials Materials, Materials Materials, Materials Materials, Materials Material	Employment (*Sert Dat 8x252000 T Teaching Start Yee 500000 Econes Number 500000 Econes V	Stormation Exactly back the field Starting back the field FTE Prevent (which number Starting back the field Starting	0-100) *			

2. Edit Employment: If an Assignment changes during the year, enter an End Date on the current assignment and create a new one (do not modify District Employment, unless there's a break in employment at the district). In this example, the employee changed Assignment from one school to another. Other changes could include a change in State Assignment Code and/or FTE.

Baker , Re Gender: F	ebekah						
Overrides	Fees ID Hi	story Schedul	e Payments	Impact Aid	Military Connections	School Boundary	S
Demographics	Identities	Households	Relationships	Enrollments	District Employment	District Assignments	
New	ents						
Assigning	UTILO Ina Cabaal						
Adams E Adams E Adams (04)	28/2009-12/31/2023) lem School 28/2009-12/31/2023) / School 01/2024-) School	Old Assignment					
- (01)	01/2024-)						

- 3. Create a New Assignment: For employees hired after the last personnel update, use the Staff Locator Wizard to create an employment record.
 - a. Enter Last Name, First Name, and Gender to search. If a staff member exists, click the name. If not, click Create New District Staff (if you are unsure of a match, either contact the AIM Helpdesk or click Create New District Staff).



b. Enter Staff State ID (SEID) and Employment Information Start Date (populates the District Employment tab). Click Save.

New Staff					
Create a new staff in Infinite	Campus District				
Fill out the form and click sa	we to create a new staff.				
Person Information					
"Last Name	'First Name	Middle Name Suffix			
Gabor	Zsa Zsa	`			
"Gender					
P. Fomale V	See Sec Number				
Race/Ethnicity					
Is the individual Hispanic/Latin	27				
Is the individual from one or mo (check all that apply)	re of the these races?				
American Indian or Alaska	Native				
Asian					
Black or African American					
Native Hawaiian or Other F	Pacific Islander				
- Ville					
Description Determination					
Race/Ethnicity Determination					
Home Primary Language					
Select a Value					
Language of Impact					
cargage of angles	~				
Person Identifiers					
Student State ID					
Local Staff Number					
Staff State ID 1234	56				
Parries (1110)					
Person Gold					
Employment Informatio					
Start Date	End Date				
02/06/2024	Transhing Manual Reading				
	reaching rears Modifier	Populates the District			
Liceose Number	FTF Percent (whole number 0	100 Employment tab			
	Contraction (Amore Humber of	and a second second second			
Seniority	Education				
		~			
	Save				
	Save				

c. Create New District Assignment. Enter School, Start Date, State Assignment Code, FTE (if applicable) and any other information required for the State Assignment Code. Click Save.



STEP TWO B: UPLOAD PERSONNEL

<u>These instructions only work for new staff.</u> To edit existing staff, follow steps 1 and 2 under Step Two A above.

PATH (OL): MT State Reporting>MT Data Upload PATH (NL): Reporting>MT State Reporting>MT Data Upload

Create an upload file from your Personnel System or using the <u>Terms of Employment</u> template. Upload the file in *.tsv format.

- 1. Select Terms of Employment.
- 2. Select either Validate and Test File or Upload File (recommend using Validate and Test File prior to upload for data validation purposes).
- 3. Choose file and Submit to Batch.
- 4. The upload results will show under Batch Queue List. Review the report and correct errors by repeating the steps above or using Step Two C to hand enter corrections/omissions.



STEP THREE: RESYNC DATA

PATH (OL): System Administration>Data Utilities>Resync State Data PATH (NL): System Settings>Data Interchange Administration>Resync State Data - Batch

Before continuing with Step 4 do a complete resync of data to ensure full sync with the state.

Resync Stat	e Data - Batch ☆							
State Data Resyn This tool will se it completes. T application (Le available.	that Data Revenue house/cation The survey interview data Year Ne data watter to the data watters. The experimentation will heaper approximate and year all sources a estimate an extra source of the experimentation of the second source of the second sour							
Check depe	ndencies DIS-Otivects	Last Resync Results		Ter	stAccommodations	04/08/2024 09:20:44	Processed: 0 Errors: 0	0
-	- Cintin	04/30/2024 17:00:20 Processed: 1 Errors: 0		Tra	inscriptCourseSE	04/08/2024 09:20:44	Processed: 0 Errors: 0	0
	⊡ School	04/30/2024 17:00:20 Processed: 40 Errors: 0		Ver	ccineShot	04/08/2024 09:20:44	Processed: 0 Errors: 0	0
	⊡ Calendar	04/30/2024 17:00:20 Processed: 3 Errors: 0		Personide	entityNoStateIDOnly	04/08/2024 09:20:44	Processed: 0 Errors: 0	0
	CourseSection	04/25/2024 08:59:52 Processed: 2615 Erron		SchoolInstruction	nMode	04/08/2024 09:20:44	Processed: 31 Errors: 0	0
			Send Resync					

STEP FOUR: VALIDATE DATA

PATH (OL): Data Integrity Tools>Data Validation>Validation Groups OR Data Validation Reports PATH (NL): Reporting>Data Validation>Validation Groups OR Data Validation Reports

- 1. Search for "End of Year Compensation Expenditure". Select the End of Year Compensation Expenditure TOE Data Checks 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:
 - a. <u>TOE Missing Assignment</u>: Employment records missing State Assignment Code.
 - b. <u>TOE Missing SEID</u>: Employment records missing Staff State ID (SEID).
 - c. <u>TOE District Assignment Missing District Employment</u>: Staff records with a District Assignment, but no District Employment.
 - d. <u>TOE District Assignment Missing FTE</u>: Staff with a State Assignment Code requiring FTE, where FTE is missing.
 - e. <u>TOE District Assignment with FTE that Should Not Have FTE</u>: Staff with a State Assignment Code not requiring FTE, where FTE is entered.
 - f. <u>TOE District Assignment Identified as Contractors in Error</u>: Staff with a state Assignment Code that does not allow an MT Title of Contractor.
 - g. <u>TOE District Assignment MT Titles of Contractor and SPED Cooperative Staff with FTE</u>: Staff identified in the District Assignment, MT Titles, as Contractor or SPED Cooperative Staff with FTE entered.
 - h. <u>TOE District Assignment Not School Level</u>: Staff with a State Assignment Code requiring school level assignment entered as District Level EL/HS/K-12.
- 2. Once all errors and warnings have been checked, run the above Validation Group as a Validation Report with the Run at State option selected. Running the report at both the district and state ensures that data has fully synced prior to certification. If there are mismatches between the state and district, repeat Step 3 and re-run the Validation Report at the state.

STEP FOUR: CERTIFY DATA

PATH (OL): Data Integrity Tools>Data Certification>Event Certification PATH (NL): Reporting> Data Certification>Event Certification *It is recommended that you wait at least 60 minutes after a complete resync before certifying data

- 1. From the Event Dashboard, select End of Year Personnel (Comp. Expenditure) Certification 2023-24.
- 2. Select Certify & Submit.

External Data Links:	
Ad Hoc Data Links:	
Data Validation Groups:	
Review Snapshot Snapshot has been captured. Click below to review the data. Review Snapshot	
Status Please review all data for this event before clicking the Certify & Submit button.	
Certify & Submit	- Certified on 01/02/2024 08:47
View District Certification Status	
Refresh Show top 50 v tasks submitted between 04/23/2024 and 04/30/2024	
Batch Queue List Queued Time Report Title Status Download	

If the district discovers a reporting error, please contact the AIM Unit to request recertification. If the AIM Unit discovers an error the certifier(s) may receive a message requesting correction and recertification.

References for this guide:

• TOE Position Code Crosswalk

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