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.
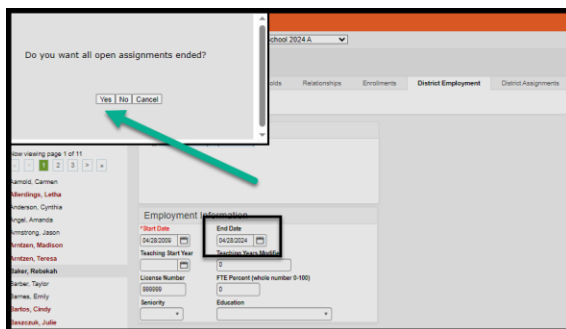

2. Edit Employment: If an Assignment changes during the year, enter an End Date on the current assignment and create a new one (do not modify District Employment, unless there's a break in employment at the district). In this example, the employee changed Assignment from one school to another. Other changes could include a change in State Assignment Code and/or FTE.
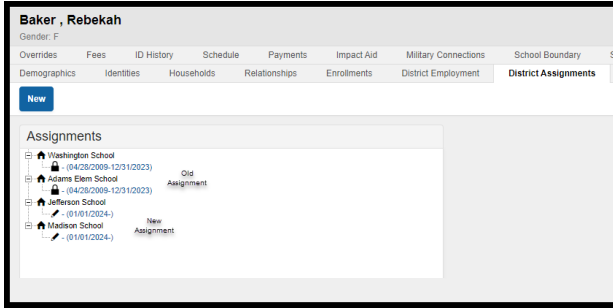
3. Create a New Assignment: For employees hired after the last personnel update, use the Staff Locator Wizard to create an employment record.

   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).
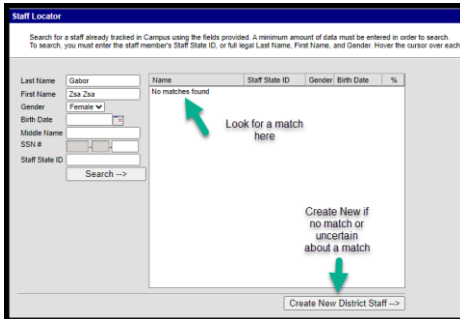
   b. Enter Staff State ID (SEID) and Employment Information Start Date (populates the District Employment tab). Click Save.
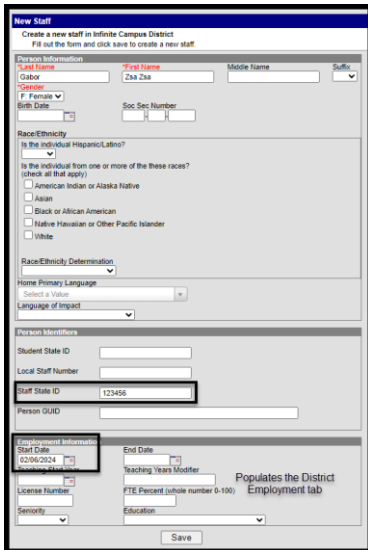
c. Create New District Assignment. Enter School, Start Date, State Assignment Code, FTE (if applicable) and any other information required for the State Assignment Code. Click Save.

STEP TWO B: UPLOAD PERSONNEL

These instructions only work for new staff. 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 Terms of Employment 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.
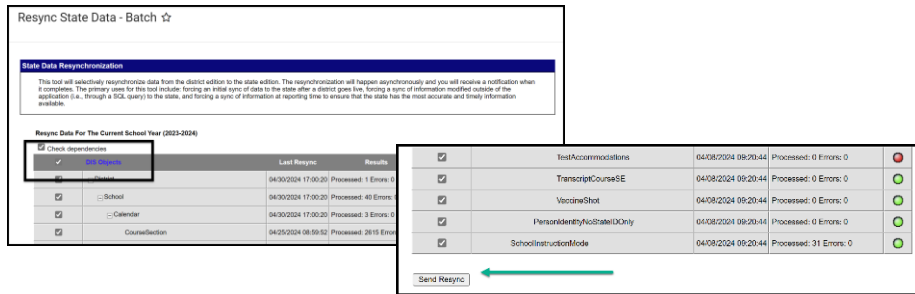
STEP FOUR: VALIDATE DATA

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
*<mark>*It is recommended that you wait at least 60 minutes after a complete resync before certifying data</mark>*

1. From the Event Dashboard, select End of Year Personnel (Comp. Expenditure) Certification 2023-24.
2. Select Certify & Submit.
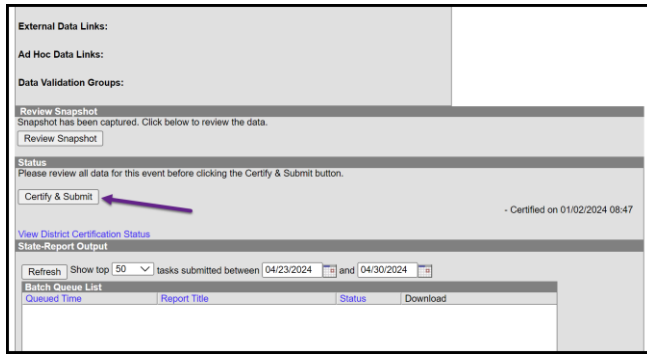
If the district discovers a reporting error, please contact the AIM Unit to request recertification. If the AIM Unit discovers an error the certifier(s) may receive a message requesting correction and recertification.

References for this guide:
- [TOE Position Code Crosswalk](#)

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