img

INFORMATION MARKETING GROUP (IMG)
Improving K-12 Education through Software

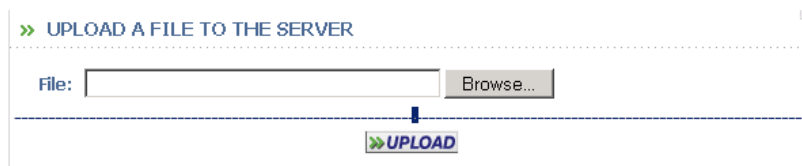# iStaff

Biographical

iStaff Table of Contents

Import Data into iStaff

Use this to import data from other databases to setup your iStaff records. You can import an iStaff Layout file (File Layout can be obtained by contacting IMG), an ELAR file or an EPIMS staff roster file. The IMG layout format can also be used to import records from generic files.

Go to <iStaff Biographical><iStaff Procedures><Import Staff File>

You must upload the file into a Temp Directory first. This copies the import file from your PC up to the iPass server system.

⇒ Click the **»UPLOAD** button

```
» UPLOAD A FILE TO THE SERVER

   File: [                              ]  [ Browse... ]
   -----------------------------------------------
                    »UPLOAD
```
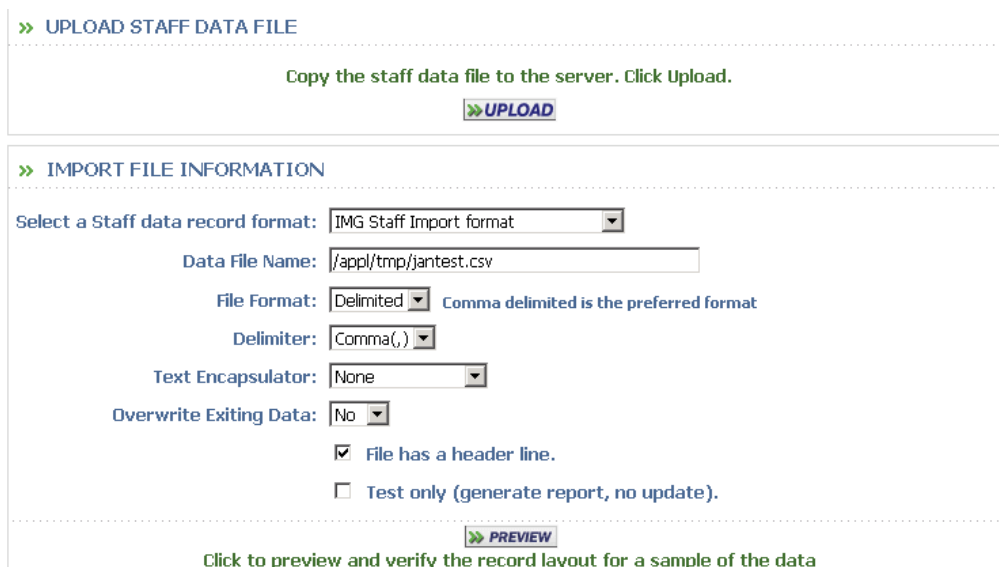
⇒ Click the **Browse** button to locate the file on your desktop or wherever you placed it.

⇒ Click on the file to bring the filename into the file box.

⇒ Click **»UPLOAD** to load the file into the proper iPASS directory.

⇒ Close the window

```
» UPLOAD STAFF DATA FILE

        Copy the staff data file to the server. Click Upload.
                         »UPLOAD

» IMPORT FILE INFORMATION

Select a Staff data record format: [ IMG Staff Import format    ▼]
              Data File Name: [/appl/tmp/jantest.csv         ]
                 File Format: [Delimited ▼]  Comma delimited is the preferred format
                   Delimiter: [Comma(,) ▼]
           Text Encapsulator: [None        ▼]
        Overwrite Exiting Data: [No ▼]
                     ☑  File has a header line.
                     ☐  Test only (generate report, no update).

                         » PREVIEW
       Click to preview and verify the record layout for a sample of the data
```

⇒ Select a **Staff data record format** from the pull-down list that corresponds to the data in the file.

⇒ Enter the **Filename**. It must be entered exactly as it was displayed when uploaded. The Filename is case sensitive. Leave the /appl/tmp/ and enter the name and file extension.

⇒ Select a **File Format**. Accept the default value of *Delimited*.

⇒ Select a **Delimiter** Example: "," (comma)

⇒ Select an **Encapsulator**

⇒ Enter Yes/No for **Overwrite Existing Data** use No for testing and Yes for the Import.

⇒ Check off the box if **File has a header line**

⇒ Check off the box if **Test Only (generate report, no Update)**

⇒ *Click* ▸ PREVIEW *to see a sample of the data in the file and to link the data to the fields in the file with the database fields.*

▸ SUBMIT		
Click to import your staff data		
Match each column to its data type/content		
Employee ID ▾	Last Name ▾	First Name
Employee #	Last Name	First Name
254975	White	Carol
254975	Waterhouse	Joan
254223	Lizotte	Michelle
255131	Schusheim	Nancy
251922	Sharp	Arthur
▸ SUBMIT		
Click to import your staff data		

⇒ Match each column of the file to the correct corresponding database field using the drop down list above each data field examples.

⇒ Check the **Test** and **Overwrite** check boxes above to make sure they are set appropriately.

⇒ *Click the* ▸ SUBMIT *button to import your Staff data file*

Setting up Teachers in iStaff

Add a Teacher

Use the <iStaff Biographical><Add/Modify Staff> to add a teacher or staff people to the database. Do not use the <Administration><School Resources><Teacher and Staff> Tab.

Team Teaching

No longer add team teachers to the database as a separate teacher. Example Jones/Minor.
On the <Course Catalog><Course Details><Section Schedule> screen you can select more than one teacher and add the Team Teacher Name to the **Teacher Name to Print** field. Teachers can also be granted access to each others Rankbook in iTeacher. One teacher establishes the rankbook, then after access is granted under <Security><Assign Teacher Access> the other teacher can utilize the same rankbook.

Am/Pm Pre-School and Kindergarten Teachers

No longer create two teachers with usernames and passwords for Am and PM Kindergarten or Pre-School. Example: JonesAm and JonesPM. Create one teacher schedule that teacher with a course with enough sections to cover all the student's enrollment possibilities. Example: One section for Am Mon, Wed, Fri. One for Am Tue and TH. One for PM Mon, Wed, Fri and one for PM Tue and Th. Assign periods so that the teacher can do Period Attendance for these students. *** IMG will be coming up with a way to have the period attendance for these students reflect the appropriate numbers for Days in Attendance and Days in Membership for the DOE52 SIMS transmissions.***

Elementary Teachers

With the EPIMS system all teachers including Elementary Teachers need to be scheduled in order to have their Work Assignment Records established. Set up one course for each Grade level. Set up Sections for each homeroom in that grade. Assign a teacher and Grade Level to each section.

The <Course Catalog>

Go to <Scheduling System><Course Catalog><Course Details>

⇒ Use the **Field to Update** drop downs to select fields to Mass Update

The following EPIMS field can be updated:

⇒ **DOE Subject Area/Course**

⇒ Click on the **Magnifying Glass** to select the correct **DOE Subject area**

<Course Section Schedule>

Go to <Scheduling System><Course Catalog><Course Details>

⇒ Click on a **Course Number** to open the details screen

⇒ Click on the Blue underlined **Schedule** Link next to the section to open the Course Section Schedule

⇒ Select **Term** for the section

⇒ Select **Teacher(s)** for the section. You can select multiple Teachers and they will be listed with an **X** next to their name. Clicking the **X** will unselect the teacher.

⇒ Select **Teacher Name to Print** for the section. This is to be used when selecting multiple teachers. The information placed in this box will be printed on Report Cards, Progress Reports and Schedules. This is very helpful for Team Teaching situations where both names are needed on reports.

⇒ Select **Room** for the section

⇒ Select **Grade** for the section

⇒ Select **Periods** for the section

iStaff Biographical

\<Add Modify Staff\>

Search for the name of the staff member you need to modify data for. Click on their name to open their record tabs.

<Employee Biographical Data> Tab

This tab allows the HR administrator to update Staff Address, Phone and Biographical Information.

Enter the following information is for EPIMS

⇒ Enter the **Employee ID (EMP ID)**

⇒ Enter the **First Name**

⇒ Enter the **Middle Name**

⇒ Enter a **Last Name**

⇒ Select an **Ethnicity**

⇒ Select a **Gender**

⇒ Select an employee **Status**

⇒ Enter **Date of Birth**

Fill in the rest of the fields as needed.

<Career> Tab

This tab allows the HR administrator to Add, update or Delete career information.

```
          Employee: Mary Aaron
          Emp ID: 9519              No image file is available.
          Department: Admin   Job: Counselor      Alt Dept: 855
```

» SEARCH EMPLOYEE CAREER RECORD

You may use Enter/Return or Click Search

Year: [All ▼]

» SEARCH **» CLEAR**

» EMPLOYEE CAREER

» ADD

✦ Employee Career ✦

Start Date ▼	End Date	Department	Supervisor	Building	Bargain Unit	Job Type	FTE	Main Job
03/07/05	?	Math	Adams, David	Bldg 1	N/A	Teacher	0.50	No
07/01/05	11/29/05	Admin	AVILA, ERIN	Bldg 1	N/A	Counselor	0.50	No

» ADD

All careers for the employee are listed here. The most recent career will appear at the top.

⇒ Click on the Career **Date** to open the employee career screen.

⇒ Click **Add** to add another career.

» CAREER RECORD -- FTE FOR OTHER CURRENT JOBS TOTAL - 0.60

Job:	Teacher - Specialist	School:	iPass Middle School
Department:	English	Building:	Bldg 123
Start Date:	03/07/05	Appointed Date:	03/05/05
Supervised By:	AIELLOO, Staff	Appointed By:	ANDERSON, BETH
Is Main Job?	☐	FTE this job:	0.30
Licensed for Job?	☑	Highly Qualified?	☐
End Date:		End Reason:	
Bargaining Unit:	Mass Teacher Union 902	Auto-Assign Compensation?	☐
Level:	1	Step:	3

Cost Center(s):
```
** None **
AnnualBudget
DOE Grant
Scholarship DOE
```

Staff Report Item: E-1-20-English/Language Arts

» SUBMIT **» CANCEL**

⇒ You can also edit the **Job** on the Career Batch Entry Screen. (Refer to Page 30)

⇒ You can also edit the **School** on the Career Batch Entry Screen. (Refer to Page 30)

The Following information is for EPIMS

⇒ Enter **Start Date** used for Date of Hire

⇒ Select a **Status**

⇒ Select a **Job** used for Job Classification

⇒ Select a **School** use to generate School and District Numbers

⇒ Select an **FTE** used to generate the FTE by Section on the Work Assignment File

⇒ Use **End Reason** and **End Date** only when an employee leaves or ends a career

Fill in the rest of the fields as needed.

<DOE EPIMS DATA> Tab

This tab allows the HR administrator to edit the EPIMS data that will be sent to the DOE.

⇒ Select YES/NO for **Report To DOE**

⇒ Adjust all **EPIMS fields** as needed before submitting to the DOE

<DOE EPIMS DATA> Tab Part 2 Work Assignment

Each course section is displayed on this screen for the teacher.

⇒ Adjust all **EPIMS fields** as needed before submitting to the DOE

⇒ **FTE** is a calculated field based on the FTE in the most recent Career record divided evenly by the course sections taught

⇒ **Class Section** comes from the Course Catalog

⇒ **Grade by Course** comes for the Course Catalog, Course section schedule

<Attendance Summary> Tab

This tab allows the HR administrator to view a Staff Person's Attendance.

For the Dates: 7/1/2006 to 7/1/2007					
Date	**Day**	**Description**	**Amount**	**Leave Type**	**Note**
04/27/2007	F	Absent 2 hr morning Sick	0.25	Sick	
		Total:	0.25		Counts: 1

» TIME OFF ROLLOVER

Last Rollover Date: 12/01/2005

	Sick	Personal	Vacation	Professional	Other
Rollover	23.98	28.34	42.45	27.56	22.17
Earned	0.00	0.00	0.00	0.00	0.00
Used	0.50	0.00	0.50	0.00	0.00
Current Balance:	23.48	28.34	41.95	27.56	22.17

This is a view only screen showing the Days that the person was out and the balances that they have for Sick, Personal, Vacation, Professional and other.

<Certification / Achievement> Tab

This tab allows the HR administrator to Add, Edit and Delete the staff person's Certification Information.

» SEARCH CERTIFICATION/ACHIEVEMENT RECORD

You may use Enter/Return or Click Search

Year Obtained: [▼]
Year Expired: [▼]
Require Renew: [▼]
Certification / Achievement: [ ] 🔍

»SEARCH **»CLEAR**

» CERTIFICATION/ACHIEVEMENT

» ADD

Certification/Achievement

Date Obtained ▼	Date Expired	Require Renew	Certification/Achievement	Organization	Level	
05/01/99	05/01/07	yes	Bilingual English	Department Of Education MA	1-6	Copy
05/01/99	05/01/05	yes	Bilingual English	Department Of Education MA	5-9	Copy

⇒ Click the Date to open the record.

» CURRENT CERTIFICATE/ACHIEVEMENT RECORD

⇒ Click the **Add** button to enter a new Certification

⇒ Enter a **Date Obtained**

⇒ Enter an **Date Expired**

⇒ Select Yes/No for **Requires a Review**

⇒ Enter a **Reference #**

⇒ Enter a **Score**

⇒ Click the 🔍 to select the **Certification** from the table of MADOE Certifications.

⇒ Enter the **Level**

⇒ Select a **Type**

⇒ Check the **Delete this Achievement or Certification?** Box to delete

<Compensation> Tab

This tab allows the HR administrator to Add, Edit or Delete a staff person's Compensation, Roll Over and Auto Assigned Compensation of Salary, Sick, Personnel, Professional, Vacation and Other Absent Day.

⇒ Click the **Date** button to Edit a Compensation record

⇒ Click the **Add** button to enter a new Compensation

⇒ Enter a **Awarded Date**

⇒ Select a **Compensation**

⇒ Enter an **Amount**

⇒ Enter a **Unit**

⇒ Select **Debit or Credit** Debit will take away the time, Credit will add Earned Time.

⇒ Select the **Awarded By**

⇒ Select the **Confirmed By**

⇒ Check the **Delete this Achievement or Certification?** Box to delete

<Discipline> Tab

This tab allows the HR administrator to Add, Edit or Delete a staff person's Discipline Records

⇒ Click the **Date** to Edit the Discipline record

⇒ Click the **Add** button to enter a new Discipline record

⇒ Enter a **Offense Date**

⇒ Select a **Offense**

⇒ Enter an **Offense Comments**

⇒ Select a **Disc Action**

⇒ Enter a **Action Amount**

⇒ Enter an **Action unit**

⇒ Enter a **Action Expire Date**

⇒ Select the **Imposed By**

⇒ Enter an **Imposed Date**

⇒ Check the **Delete this Discipline Record?** Box to delete

<Professional Development> Tab

This tab allows the HR administrator to Add, Edit or Delete a staff person's Professional Development.

⇒ Click the **Date** to Edit the PDP record

⇒ Click the **Add** button to enter a new PDP record

⇒ Select a **Course** this list is created in the Professional Development System. (Refer to Page 45)

⇒ Select a **Status**

⇒ Select an **Apply to Area** This drop down comes from the list of Certificates the person has in the Certificate and Achievement Screen.

⇒ Enter a **Start Date**

⇒ Enter a **Completed Date**

⇒ Enter an **Grade**

⇒ Enter a **Credits**

⇒ Enter a **Hours**

⇒ Enter an **PDP Points**

⇒ Enter a **Reimburse Condition**

⇒ Select YES/NO **Will Reimburse**

⇒ Enter a **Cost**

⇒ Enter a **Reimburse Percent**

⇒ Enter a **Reimburse Date**

⇒ Select a **Reimburse Approved By**

⇒ Check the **Delete this Professional Development Record?** Box to delete

<Review> Tab

This tab allows the HR administrator to Add, Edit or Delete Review (Evaluation) information for the staff person.

Review Date ▼	HRSReviewType	Reviewed By
07/01/06	Annual	Aaron, Mary
09/01/06	Quarterly	Adams, SS

» EMPLOYEE REVIEW

» ADD

• Employee Review •

» ADD

⇒ Click the **Date** to Edit the Review record

⇒ Click the **Add** button to enter a new Review record

⇒ Enter a **Review Date**

⇒ Enter an **Review Type**

⇒ Enter a **Review By**

⇒ Select 1 or more of the 5 available **Competencies**

⇒ Enter a **Comp Rating** for each of the 1 to 5 selected Competencies

⇒ Enter a **Comment**

⇒ Check the **Delete this Review Record?** Box to delete

<Attendance List> Tab
This tab allows the HR administrator to Add, Edit or delete Attendance days for a staff person.

⇒ Click the **Date** to Edit the Attendance record

⇒ Click the **Add** button to enter a new Attendance record

NOTE: Attendance is usually added by using Enter Staff Attendance. (Refer to Page 42)

⇒ Enter an **Attendance Date**

⇒ Enter an **Attendance Code**

⇒ Enter an **Excess Hours**

⇒ Enter a **Date Approved**

⇒ Select **Approved By**

⇒ Enter a **Note**

⇒ Check the **Delete Attendance?** Box to delete

iStaff Procedures

<Career Batch Entry>

The Career Batch Entry screen is used to Add, Edit or Delete career records.

⇒ Click **Post** to edit a Record. Only records that have Post checked off will be updated.

⇒ Click **New** to create a new record. Checking New will create a new record for the staff person.

⇒ Click **Delete Career** and **Post** to delete a record

The following EPIMS fields can be modified using this screen:

⇒ **Employee ID**

⇒ **Start Date**

⇒ **FTE**

⇒ **Main Job**

<Staff Batch Entry>

This tab allows the HR administrator to mass edit fields in the employee's records.

You may use Enter/Return or Click Search					
Employee ID:			Last Name:	E	
Building:	▼		Department:	▼	

Fields to Update

Field to Update:	License Number ▼	Field to Update:	State ID ▼
Field to Update:	Report to DOE ▼	Field to Update:	SSN ▼

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

» SEARCH   » CLEAR

» MAINTAIN EMPLOYEE DATA

» SUBMIT

✦ Employees ✦

Emp ID ▼	Name	Building	Department	License Number 📄	State ID 📄	Report to DOE 📄	SSN 📄
1317	Evans, Arlene					No ▼	
1355	EISEN, AMY	Bldg 107045	Admin			No ▼	
1356	ELLIOT, AMY	Bldg 107045	Admin			No ▼	
1357	EVANS, ARLENE					No ▼	
1483	ENGEMANN, ELAINE	Bldg 107045	Admin			No ▼	
1502	EGAN, EILEEN	Bldg 107045	Admin			No ▼	
1577	Eastman, Sandra		Admin			No ▼	

» SUBMIT

The following EPIMS fields can be modified using the Staff Batch Entry Screen:

⇒ **Date of Birth**

⇒ **Employee Status**

⇒ **End Date**

⇒ **Exit Reason**

⇒ **First Name**

⇒ **Middle Name**

⇒ **Last Name**

⇒ **Federal Salary Source 1**

⇒ **Federal Salary Source 2**

⇒ **Federal Salary Source 3**

⇒ **License Number**

⇒ **Percent of Federal Salary Source 1**

⇒ **Percent of Federal Salary Source 2**

⇒ **Percent of Federal Salary Source 3**

⇒ **Report To DOE**

⇒ **State ID (Mepid)**

<Bargaining Unit Contracts>

This menu option is where the HR Administrator can Add, Edit and Delete contracts. Contracts are linked to Bargaining units.

» BARGAINING UNIT CONTRACT						
		» ADD				
		✦ Contracts ✦				
Bargaining Unit	Contract Title	Active	Date Start	Date End	Levels	Steps
Ashland Educator Assoc	Teachers Contract 2006/2007	Yes	07/01/00	06/30/01	7	12

⇒ Click on the **Contract Title** to open the contract

⇒ Click the **Add** button to start a new Contract

The top part of this screen is the Contract Details.

⇒ Enter a Contract **Title**. Entering the year in the contract title is helpful.

⇒ Select a **Bargaining Unit**

⇒ Select a **Status**

⇒ Enter a **Contract Start Date**

⇒ Enter a **Contract End Date**

⇒ Enter **Notes** about the contract

⇒ Use the **Create a New Contract** Button to Create a new contract

⇒ Use the **Copy This Contract** button to Copy the contract

The next part of the screen is the Compensation Parameters

⇒ Enter the Carry-Over Maximum Amounts for the contract. These amounts are what can be rolled over from year to year for this contract.

⇒ Use the Salary **Auto Assign Parameters** to set up the Auto Compensation runs for this contract. This portion of the screen is where you activate the compensation run which gets executed later using the **Apply Auto Assignment or Contract Compensation Assignment**. You must activate the One time Compensations, the Monthly Compensations, The Quarterly Compensations and the Every 6 Months Compensations runs for this contract.

⇒ Set up each auto Compensation for this Contract using the **Other Compensations** section

This part of the screen is for Compensation Plan Adjustment. It is used to store the Steps and Levels and to adjust the amounts for each step and level.

Compensation Plan Adjustment							
(Optional, as needed) Salary Multiply By Amount: [ ] Salary Add To Amount: [ ]							
≫ SUBMIT ≫ CANCEL							
Steps	**Levels**						
	Enter labels and a Salary Amount on each Step at each Level						
	A	B	C	D	E	F	G	H
Labels	Bach + 0	Bach + 5	Bach + 30	Mast + 5	Mast + 10	Mast + 15	Mast + 30	[ ]
1 [1]	15,571.71	29,067.19	42,562.67	56,058.16	69,553.64	83,049.12	97,323.19	[ ]
2 [2]	29,067.19	42,562.67	56,058.16	69,553.64	83,049.12	97,323.19	99,918.47	[ ]
3 [3]	42,562.67	56,058.16	69,553.64	83,049.12	97,323.19	99,918.47	102,513.76	[ ]
4 [4]	56,058.16	69,553.64	83,049.12	97,323.19	99,918.47	102,513.76	105,109.04	[ ]

⇒ Enter the **Step** and **Level** information for this contract

⇒ Use the **Multiply by Amount** box to adjust the Contract Step and Level amounts. Example: to Increase the Step and Level Amounts by 50% you would put 1.50 in the **Multiply by Amount** box and click Submit. All amounts will then show an increase of 50%

⇒ Use the **Salary Add To Amount** box to adjust the Contract Step and Level amounts. Example: to Increase the Step and Level Amounts by $1000.00 you would put 1000.00 in the **Salary Add To Amount** box and click Submit. All amounts will then show an increase of $1000.00

<Apply Auto Assignment or Contract Compensation Assignment>

After the activation of all the One Time, Monthly, Quarterly and Every 6 month auto compensations the HR Administrator uses this Tab to execute the Auto compensation runs.

Compensation Assignment Selection

Bargaining Unit:	Ashland Educator Assoc ATT Local 104 ▲▼
Due Date From:	
Due Date To:	

» SEARCH » CLEAR

Check All Clear All	Contract Compensation Assignment							
Execute	Assignment Date	Bargaining Unit	Contract	Compensation	Amount	Assign Frequency	Percentage	Start Date	End Date
☐	12/01/2005	Ashland Educator Assoc	Teachers Contract 2006/2007	Sick Day	1.50	Monthly	100	12/01/2005	06/30/2006
☐	01/01/2006	Ashland Educator Assoc	Teachers Contract 2006/2007	Sick Day	1.50	Monthly	100	12/01/2005	06/30/2006

⇒ Check the **Execute** box and click submit to execute an Auto Compensation run.

<Batch Compensation Assignment>

The Batch Compensation Assignment Tab is where the HR Administrator can assign compensation to one or more staff members independent of the Auto Compensation from the contracts.

Date to be used in new Assignments:	Apr ▼ 28 ▼ 2007 ▼

» SEARCH » CLEAR

Employee Compensation Assignment - 04/28/2007										
Emp ID	Name	Building	Department	Compensation 1	Amount 1	Compensation 2	Amount 2	Compensation 3	Amount 3	Compensation 4	Amou
1553	Aaron, Mary	Bldg 107045	English	Sick Day ▼	1.0	Personal Day ▼	1.0	Vacation DAy ▼	1.0	Professional Day ▼	
1602	Aiello, Joanne	Bldg 107045	Admin	Sick Day ▼		Personal Day ▼		Vacation DAy ▼		Professional Day ▼	
1486	ALLEN, RE	Bldg	Admin	Sick Day ▼		Personal Day ▼		Vacation DAy ▼		Professional Day ▼	

⇒ Select a **Date to be Used in the New Assignment**

⇒ Enter an **Amount** for each of the compensations that you want to assign. Sick, Personal, Professional, vacation, Professional and Other Absence Day.

<Time Roll Over>

The Time Roll Over Tab is where the HR Administrator can Roll Over Time left for a staff member on their anniversary Date.

Check All Clear All							Employee Time Off Roll Over					
Roll Over	Emp ID	Name	Building	Dept	Delete	Last RollOver	RO/Earn/Used Sick	CF Sick	RO/Earn/Used Personal	CF Personal	RO/Earn/Used Vacation	CF Vacation	RO/Earn, Professi
☐	910414	Aaron, Mary	Bldg 107045	English	☐	12/01/05	23.98 / 0.00 / 0.50	23.48	28.34 / 0.00 / 0.00	28.34	42.45 / 0.00 / 0.50	41.95	27.56 / 0.0
☐	7777	Adams, SS	ipass High School	Admin	☐	06/20/05	3.15 / 0.00 / 0.00	3.15	4.25 / 0.00 / 0.00	4.25	5.60 / 0.00 / 0.00	5.60	6.70 / 0.00

⇒ Check the **Roll Over** box for the staff member you want to roll Time for

⇒ Adjust the Amounts for Sick, Personal, Vacation, Professional ad Other Absent Day.

⇒ Click the **Submit** button to roll the time

Reports iStaff Biographical

<Certification> Report

The Certification Report lists the Certifications that have been entered for a Staff person on the Certificate and Achievement Screen.

    Selection Criteria: From date, To date, from Employee Name, To Employee Name, From Employee ID, To Employee ID, Job Type, Building, Expire In.

    Sorted By: None

    Output:

```
Bldg      ID     Name          Cert#       Description     Exp Date   Cert Date   Level
Bldg10704 1602   Aiello, Joanne 2002002002  General Science 12/31/06   01/01/05
```

<DOE Staff Reporting (NCLB)> Report

The DOE Staff report (NCLB) report lists all the information needed for filing the MADOE District And School report.

    Selection Criteria: Print Detail or Summary, Report Date, From Employee Name, To Employee Name, From Employee ID, to Employee ID, Job type, Building, Department, Bargaining Unit, Location

    Sorted By: None

    Output:

```
Section A : DISTRICT ADMINISTRATION


Section A – 1 : ADMINISTRATORS


Assignment                         HCount   FTE    HC Lic.   FTE Lic.   FTE HiQual
-------------------------------------------------------------------------------
01 – Superintendent of Schools        0     0.00    0          0.00        0.00

02 – Assistant/Associate/Vice Superinten  0  0.00   0          0.00        0.00

03 – School Business Administrator    0     0.00    0          0.00        0.00
```

<Employee CORI> Report

The employee Cori report lists all staff Cori checks dates that are older than a given Date.

Selection Criteria: From Employee name, To Employee Name, From Employee ID#, To Employee ID#, Job Type, Building, Department, Status, Older Than, Show Date Missing Only.

Sorted By: Last Name, OD, Department, Building, Status, Cori Date.

Output:

Public School District

Employee CORI Report 04/27/2007

CORI dates older than 05/01/2006

Name	ID	Last CORI	Status	Job Type
	Email/Phones	**Department**	**Building**	
Adams, David	1600	-none-		Administrator
	dadams@pbs.com 999-999-9999 CELL PHONE	Admin	ipass High School	
Adams, SS	1601	01/01/2001		Tch Asst
	ssadams@pbs.com 777-777-7777 CELL PHONE	Soc.Std.	ipass High School	
Aiello, Joanne	1602	09/22/2001	Retired	Substitute
	jai@hotmail.com 111-111-5840 CELL PHONE	Admin	ipass High School	

<Mailing Label> Report

The Mailing Label report makes mailing labels based on the search criteria selected.

Selection Criteria: From Employee name, To Employee Name, From Employee ID#, To Employee ID#, Job Type, Building, Department, Bargaining Unit, Emp Status, Label Style

Sorted By: Name, Job Type, Building, Department, Bargaining Unit

Output:

Mary Adams
3252 Wilkinson St.
Westville, MA 01702

Simon Alveres
55 Clark Road
Saxonville, MA 01702

Kayla Anders
555 Lomas Circle Apt B
Framingham, MA 01702

<PCL Data Sheet > Report

The PCL Data Sheet Report lists all the Biographical Data in the database for each staff to verify.

Selection Criteria: Form, Staff ID, Last Name, Department, Job Type, Output Device.

Sorted By: Name (Last + first), Department, Job Type.

Output:

iPASS Public School District   04/27/2007
Staff Biographical Information - Verification Report

Dear Mary Aaron
Please verify this information from our staff database and make any corrections or additions.
---- *Biographical Data* ----

First Name: Mary	ID# 910414 Department: English Gender: **Female**
Full Middle Name: Helene	Primary Job: Department Chairperson Homeroom: **1209**
Last Name: Aaron	Birth Date: 10/27/1966 School:
Phone Rank 1 #:	Your Social Security Number: 012-55-3516
Your Email Address: maaron@imgsoftware.com	Status: Active
License Number: 371555	Is your Ethnicity Hispanic or Latino? No
Your Race: 05 - White	Please circle the numbers of all that apply: 1 2 3 4 5

(1=White, 2=Asian, 3=American Indian or Alaska Native, 4=Black or African American, 5=Native Hawaiian or Other Pacific Islander)

<Staff Directory> Report

The Staff Directory Report lists Addresses and Phone Numbers for all staff in a given Building.

Selection Criteria: Job Type, Building, Department, Show Alt department, Phone.

Sorted By: Name, job Type/Name, Building/Name, Department/Name, Bargaining unit/Name, Alt department/Name.

Output:

Emp ID	Name	Street	City	ZIP	HOME	Job	Department	Building	Barg Unit
9109	Aaron, Mary	23 Main	Town	01089	777-777-7777	Teacher	Eng	High	N/A

<Seniority> Report

Selection Criteria: Print, Job Type, Building, Department, Bargaining Unit, Employee Status.

Sorted By: Name, Length of Service, Longevity, Longevity/Length

Output:

```
  * - FTE is 0
 ID       Name                    Years    Started   Job        Dept      Bldg         Barg Unit


  1370     GAGNON, MARY LOU        2.65    02/18/04   Administra Admin     ipass High    N/A
 * 1       02/18/04  -  ?          0.00    0.00       Teacher    Eng       ipass High    N/A
   2       09/01/04  -  ?          0.50    1.33       Administra Admin     ipass High    N/A
   3       09/01/04  -  ?          0.50    1.33       Assistant  Admin     ipass High    N/A

  1628     Benjamin, David         0.80    07/10/06   Teacher    Science   ipass High    N/A
   1       07/10/06  -  ?          1.00    0.80       Teacher    Science   ipass High    N/A
```

\<Staff Demographics\> Report

The Staff Demographics Report lists the ID, Name, Address, DOB (optional), Social Security Number (optional), Phone number (optional), Building, Department, Alt Department.

> **Selection Criteria:** From Employee Name, To Employee Name, From Employee ID#, to Employee ID#, Job Type, Building, Department, Employee Status, Show Alt Department, Show Phone, Show SSN/DOB.

> **Sorted By**: Job type, Building, Department, Bargaining Unit, Alt department.

> **Output:**

```
ID          Name/Address                    DOB/SSN/Phn       Bldg/Dept/AltDept


910414      Aaron, Mary                     10/27/66          BLDG: Bldg 107045
            9901 396 Main Street   Apt
            Haverhill, CA 96297             ph:               Barg Unit: Ashland E
```

\<Tenure Report\> Report

The Tenure Report lists the staff person's Professional Status which is the number of years in service. The Professional Status is listed on the Staff's Biographical Profile Page.

> **Selection Criteria:** Highest Education Level, Professional Status, Job Type, Building, Department.

> **Sorted By**: Name, Job Type/Name, Building/Name, Department/Name, Professional Status/Name, Highest Education/Name.

> **Output:**

Employee ID	Name	Highest Education Level	Job	Department	Building	Professional Status
Q827323	Aaron, Mary	PHD	Teacher	ENG	High	1 Year

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Maintenance iStaff Biographical

<Alt Staff Departments> Tab

This tab allows the HR administrator to Add, Edit or Delete Alternative Department Codes. These codes can be used if you have two different departments.

<Bargain Unit Maintenance> Tab

This tab allows the HR administrator to Add, Edit or Delete Bargaining Unit Codes. These codes are used with the contracts.

<Certification / Achievement Types> Tab

This tab allows the HR administrator to Add, Edit or Delete Certification Codes. IMG has pre-filled this table based on the MADOE certification codes.

<Compensation Types> Tab

This tab allows the HR administrator to Add, Edit or Delete Compensation Type Codes. You must have Sick, Professional, Personal, Other Absent Day and Vacation.

<Competency Types> Tab

This tab allows the HR administrator to Add, Edit or Delete Competency Types Codes. These codes are used in the review system.

<Cost Center> Tab

This tab allows the HR administrator to Add, Edit or Delete Cost Center Codes. This code is used on the Career Screen.

<Discipline Action Types> Tab

This tab allows the HR administrator to Add, Edit or Delete Discipline Action Type Codes. This is used to assign an Action to be taken by the District placed on a staff person for a Discipline Incident.

<HRS Job Type> Tab

This tab allows the HR administrator to Add, Edit or Delete HRS Job type Codes. IMG has pre-filled this table based on the MADOE EPIMS Job Classifications.

\<HRS Person Title> Tab

This tab allows the HR administrator to Add, Edit or Delete HRS Person Titles Codes. These titles are also used in the iPass system.

\<HRS Phone Type> Tab

This tab allows the HR administrator to Add, Edit or Delete HRS Phone Type Codes. These Phone Types are also used in the iPass system.

\<Military Codes> Tab

This tab allows the HR administrator to Add, Edit or Delete Military Codes. This is used on the Staff profile Screen.

\<Organizations> Tab

This tab allows the HR administrator to Ad, Edit or Delete Organizations. This is used in the Professional Development courses.

\<Review Types> Tab

This tab allows the HR administrator to Add, Edit or Review type Codes. This is used on the Staff review (Evaluation) Screen.

\<Staff Report Headings> Tab

This tab allows the HR administrator to Add, Edit or Delete Staff Report Headings. These are used on the MADOE District Staff report. This report will be not needed by the DOE once EPIMS is due. IMG has pre-filled this table based on the MADOE Staff Report Headings.

\<Staff Report Types> Tab

This tab allows the HR administrator to Add, Edit or Delete Staff Report Types. These are used on the MADOE District Staff report. This report will be not needed by the DOE once EPIMS is due. IMG has pre-filled this table based on the MADOE Staff Report Types. These are assigned to staff members using the Career Screen or the Career Batch enter screen.

\<Start/End Types> Tab

This tab allows the HR administrator to Add, Edit or Delete Start/End Types. This is assigned on the Career Screen and is used to report the Exit Reason in the EPIMS File.

\<Teacher Status> Tab

This tab allows the HR administrator to Add, Edit or Delete Teacher Status. This is assigned on the Profile screen and is used to report the Status in the EPIMS File

\<Worker's Comp Codes> Tab

This tab allows the HR administrator to Add, Edit or Delete Worker's Comp Codes. This is assigned on the Staff Profile Screen.

iStaff Configuration

This tab is used by the HR administrator to Edit the iStaff Parameters.

Go to \<iStaff Biographical>\<iStaff Procedures>\<iStaff Configuration>

⇒ Enter the **Certification Levels:** this is used on the Certificate Tab.

⇒ Enter the **Certification Types:** this is used on the Certification Tab.

⇒ Enter the **Education Levels:** This is used on the profile page

⇒ Enter the **Valid FTE Amounts:** This is used on the Career tab. All FTEs must be entered in the following format 9.99.

⇒ Enter the **Professional Development Certificate content:** This is the HTML of the PDP certification layout. Changing this will change the PDP certificate Layout. (Printing the Certificates is Referred to on Page 48)

⇒ Enter the **Professional Development Multiple Course Certificate content:** This is the HTLM of the Multiple PDP certification layout. Changing this will change the Multiple PDP certificate Layout.

⇒ Enter the **Professional Development Program Status Codes:** These are used to show the status of PDP programs. Example: Open for Registration, Closed for Registration, On Hold or Completed.

⇒ Enter the **Professional Status Codes:** These are used in the Certification Tab to indicate the status of a certification. Example: Provisional, Temporary, or Primary.

⇒ Enter the **Professional Development Course Status Codes:** these are used to indicate an attendee's status for a PDP course. Example: Requested, Approved or Rejected.

⇒ Enter a **Starting Employee ID Number:** This is used when entering a new staff member into the database. This will be the first auto generated Employee ID.

⇒ Check off the **Send PD Administrator an Email when PD attendee status changes** box if you want an email sent.

⇒ Check off the **Send PD Administrator an Email when PD Status changes** box if you want an email sent.

⇒ Check off the **Show Alt Departments Only** if you want to only use the Alt Departments

iStaff Update Policy:

You can setup the My Profile screens to be used as data enter screens for staff. This will allow staff the ability to update their own information.

⇒ Select **Submit all changes to Change Approval process** radio button if want the staff changes to go through an approval process.

⇒ Select **Apply changes immediately** radio button if you do not want the staff changes to go through an approval process.

Grant Employees the following access/update rights:

You can setup the following data fields you want the staff to be able to Update, View or Do not Display.

Employee Personal Information:
Employee Addresses:
Employee Telephone Numbers:
Employee Date of Birth:
Employee Ethnicity:
Employee SSN:

Employee Gender:
Employee Marital Data:
Employee Military Status:
Display Employee Degree History:
Employee View/Delete Contacts:

My Profile (The Staff's View of iStaff)

The My Profile menu option is used by Staff Members to see their own information that is in the iStaff Database.

My Career

This is view only screen

```
» CURRENT CAREER
........................................................................

           Start Date: 04/04/07              Department: English
          Primary Job: Department Chairperson   Building: Bldg 107045
             Location: iPass High School         ✓ Main Job
               Job FTE: 0.30                      Licensed for Job
      Bargaining Unit: Ashland Educator Assoc    ✓ Highly Qualified
```

My Attendance

This is view only screen of the staff person's Attendance.

```
» DAILY ATTENDANCE DETAILS

                    From: 7/1/2006 To 7/1/2007
Date         Day   Description              Amount   Leave Type        Note
04/27/2007    F    Absent 2 hr morning Sick   0.25    Sick
                                    Total: 0.25          Total Incidents: 1
```

```
» TIME OFF SUMMARY

                    Date of Last Rollover: 12/01/05
                    Sick      Personal   Vacation      Professional   Other
        Rollover    23.98      28.34      42.45          27.56        22.17
          Earned     0.00       0.00       0.00           0.00         0.00
            Used     0.50       0.00       0.50           0.00         0.00
   Current Balance:  23.48      28.34      41.95          27.56        22.17
```

My Certifications

This is view only screen

My Professional Development

This is view only screen that allows updates to be made by the staff to only the Related Certification or Achievement that they want to link their PDP course to. Staff can also add their own PDP courses that were taken outside of the district.

⇒ Click the **» ADD** button to add New PDP courses to the list. These would be for courses not offered at the District.

⇒ Select a **Course** or **Click on Add a New course**.

⇒ Enter **Date Started** and **Date Completed**

⇒ Enter Course **Credits, Hours** and **PDP Points**

⇒ Click the **» SUBMIT** button to save the course information

⇒ Enter a Course **Code**

⇒ Enter a Course **Title**

⇒ Enter an **Organization** or Click **Add a New Organization**

⇒ Enter **Credits, Hours,** and **PDP Points**

⇒ Click the **» SUBMIT** button to save the course information

Sign up for Professional Development

This Tab allows the staff person the ability to sign up for PDPs offered by the District.

⇒ Click on the **Registration box** in front of the course

⇒ Click on the **Program Code** to see information about the course

⇒ Click the **» SUBMIT** button to save your selections

Update Biographical

This tab is used so that the staff can update their own biographical information. The District controls which fields can be Viewed and which ones can be Updated. The control for this is found in istaff Configuration. (Refer to Page 51)

The following information can be made available for the staff to update.
Employee Personal Information:
Employee Addresses:
Employee Telephone Numbers:
Employee Date of Birth:
Employee Ethnicity:
Employee SSN:
Employee Gender:
Employee Marital Data:
Employee Military Status:
Employee Degree History:
Employee Emergency Contacts:

Printing Staff IDs

To print Staff IDs you must first purchase an ID Printer and ID Camera. These can be purchased from IMG.

- ⇒ Click on **Staff ID** to print a copy of the ID

- ⇒ Click **Take Picture** to take a picture of a staff person

- ⇒ Click on one of the **Styles (District ID, High School, Middle School)** listed under the Image File name. You can save several different styles, one for each school.