

Finance Manager: Human Resources



State Ed Templates –

Staff Snapshot, Staff Assignment, Staff Tenure, Staff Evaluation, and Staff Attendance

The Interfaces menu within nVision Human Resources provides access to the State Ed Templates for the creation of Staff Snapshot, Staff Assignment, Staff Tenure, Staff Evaluation Rating, and Staff Attendance export files and reporting. This documentation meets the 2015-16 criteria for Staff Snapshot, Assignment, Tenure, and Attendance, and the 2014-15 criteria for Staff Evaluation.

If you have Staff Snapshot, Staff Assignment, and Staff Evaluation Ratings information stored in repository file, use the Template Import options under those routines to import that data into nVision. The files must be Excel® files that have been saved as .CSV files. After the data is imported, you can generate the Staff Snapshot, Staff Assignment, and Staff Evaluation Ratings information.

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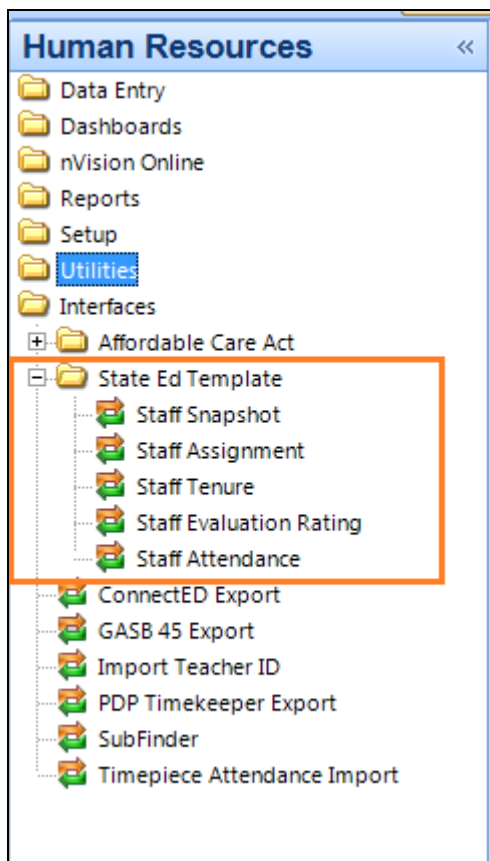
Permissions

Building Permissions

The State Ed Template routines look at the building permissions assigned to the logged in user. You will only be able to generate records for employees linked to the buildings that you have permissions to access. Therefore, before beginning, make sure your User Administrator has given you access to the appropriate buildings in User Administration – Setup – User Logins, via the Building and Department Permissions tab under the Human Resources folder.

Module and Task Permissions

In addition, make sure your User Administrator gives you access to the **State Ed Template** submenu under the Interfaces menutree in nVision Human Resources.



Your nVision User Administrator must assign the necessary State Ed Template option permissions to the appropriate user(s) records in User Logins, via the Change Overrides button on the Permission Overrides tab under the Security folder. The permissions that control the ability to use the options are:

Setauket Central School District (Test) - Permission Overrides - Admin

User Permission Overrides:
Permission overrides are specific to this user and take precedence over the permissions granted to this user via their Role membership(s).

nVision Application Sections

View: **All** Modified

- Human Resources
 - Module
 - Data Entry
 - Dashboards
 - nVision Online
 - Setup
 - Reports
 - Utilities
 - Interfaces**
 - Affordable Care Act
 - State Ed Template
 - Staff Snapshot
 - Staff Assignment
 - Staff Tenure
 - Staff Evaluation Rating
 - Staff Attendance
 - ConnectEd Export
 - GASB 45 Export
 - Import Teacher ID
 - PDP Timekeeper Export

Task

Task Name: **Interfaces**

Description: **Interfaces Task**

Properties of this Item on the application menu:

Visibility: ☒ Show ☐ Hide

Accessibility: ☒ **Enable** ☐ Disable

Clear All Ok Cancel

Setauket Central School District (Test) - Permission Overrides - Admin

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nVision Application Sections

View: **All** Modified

- Human Resources
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 - Staff Tenure
 - Staff Evaluation Rating
 - Staff Attendance
 - ConnectEd Export
 - GASB 45 Export
 - Import Teacher ID
 - PDP Timekeeper Export

Task

Task Name: **State Ed Template**

Description: **State Ed Template Task**

Properties of this Item on the application menu:

Visibility: ☒ Show ☐ Hide

Accessibility: ☒ **Enable** ☐ Disable

Clear All Ok Cancel

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 - GASB 45 Export
 - Import Teacher ID
 - PDP Timekeeper Export

Component

Component: **Create, View, Update and Delete Staff Snapshot Items**

Properties of this Item on the application menu:

Visibility: ☒ Show ☐ Hide Accessibility: ☒ Enable ☐ Disable

Permissions for this Component:

Permission Type	Grant	Deny	Description
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create a new Staff Snapshot Item
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete an existing Staff Snapshot Item
Export	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Export the Staff Snapshot Listing to Excel
Print	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print the Staff Snapshot Listing
Print Preview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print Preview the Staff Snapshot Listing
Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update an existing Staff Snapshot Item
View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View the Staff Snapshot Listing and/or Staff Snapsh...

Clear All Ok Cancel

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User Permission Overrides:
Permission overrides are specific to this user and take precedence over the permissions granted to this user via their Role membership(s).

nVision Application Sections

View: **All** Modified

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 - Staff Assignment**
 - Staff Tenure
 - Staff Evaluation Rating
 - Staff Attendance
 - ConnectEd Export
 - GASB 45 Export
 - Import Teacher ID
 - PDP Timekeeper Export

Component

Component: **Create, View, Update and Delete Staff Assignment Items**

Properties of this Item on the application menu:

Visibility: ☒ Show ☐ Hide Accessibility: ☒ Enable ☐ Disable

Permissions for this Component:

Permission Type	Grant	Deny	Description
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create a new Staff Assignment Item
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete an existing Staff Assignment Item
Export	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Export the Staff Assignment Listing to Excel
Print	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print the Staff Assignment Listing
Print Preview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print Preview the Staff Assignment Listing
Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update an existing Staff Assignment Item
View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View the Staff Assignment Listing and/or Staff Assig...

Clear All Ok Cancel

Setauket Central School District (Test) - Permission Overrides - Admin

User Permission Overrides:
Permission overrides are specific to this user and take precedence over the permissions granted to this user via their Role membership(s).

nVision Application Sections

View: **All** Modified

- Human Resources
 - Module
 - Data Entry
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 - Affordable Care Act
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 - Staff Tenure**
 - Staff Evaluation Rating
 - Staff Attendance
 - ConnectEd Export
 - GASB 45 Export
 - Import Teacher ID
 - PDP Timekeeper Export

Component

Component: **Create, View, Update and Delete Staff Tenure Items**

Properties of this Item on the application menu:

Visibility: ☒ Show ☐ Hide Accessibility: ☒ Enable ☐ Disable

Permissions for this Component:

Permission Type	Grant	Deny	Description
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create a new Staff Tenure Item
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete an existing Staff Tenure Item
Export	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Export the Staff Tenure Listing to Excel
Print	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print the Staff Tenure Listing
Print Preview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print Preview the Staff Tenure Listing
Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update an existing Staff Tenure Item
View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View the Staff Tenure Listing and/or Staff Tenure D...

Clear All Ok Cancel

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 - Staff Tenure
 - Staff Evaluation Rating**
 - Staff Attendance
 - ConnectEd Export
 - GASB 45 Export
 - Import Teacher ID
 - PDP Timekeeper Export

Component

Component: **Create, View, Update and Delete Staff Evaluation Rating Items**

Properties of this Item on the application menu:

Visibility: ☒ Show ☐ Hide Accessibility: ☒ Enable ☐ Disable

Permissions for this Component:

Permission Type	Grant	Deny	Description
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create a new Staff Evaluation Rating Item
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete an existing Staff Evaluation Rating Item
Export	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Export the Staff Evaluation Rating Listing to Excel
Print	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print the Staff Evaluation Rating Listing
Print Preview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print Preview the Staff Evaluation Rating Listing
Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update an existing Staff Evaluation Rating Item
View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View the Staff Evaluation Rating Listing and/or Staff...

Clear All Ok Cancel

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 - Staff Assignment
 - Staff Tenure
 - Staff Evaluation Rating
 - Staff Attendance**
 - ConnectEd Export
 - GASB 45 Export
 - Import Teacher ID
 - PDP Timekeeper Export

Component

Component: **Create, View, Update and Delete Staff Attendance Items**

Properties of this Item on the application menu:

Visibility: ☒ Show ☐ Hide Accessibility: ☒ Enable ☐ Disable

Permissions for this Component:

Permission Type	Grant	Deny	Description
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Create a new Staff Attendance Item
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete an existing Staff Attendance Item
Export	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Export the Staff Attendance Listing to Excel
Print	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print the Staff Attendance Listing
Print Preview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Print Preview the Staff Attendance Listing
Update	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Update an existing Staff Attendance Item
View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View the Staff Attendance Listing and/or Staff Atten...

Clear All Ok Cancel

Staff Ed Template Setup

The steps on pages 8 through 25 **MUST** be taken in nVision **PRIOR** to creating the State Ed Extract files.

NOTE: The following is a review of data, some of which may have already been completed in your organization.

School Districts vs Charter Schools

In order to create the Staff Snapshot extract file, each facility, based on their institution type, must have the proper Basic Educational Data System BEDS or Institution code for state information reporting.

In **Tools - System Options**, click the **General** tab. Click the **Update** button.

The screenshot shows the 'System Options' window with the 'General' tab selected. The 'Organization Type' section is highlighted with a red box, showing 'School District' selected. The 'District BEDS Code' field is highlighted in yellow and contains the value '123456'.

Organization Name:	Demo CSD	Days to Notify of Password Expiration:	14
Federal ID:	149999999	FM2004 Integration Enabled:	<input type="checkbox"/>
District BEDS Code:	123456	Organization Type:	<input checked="" type="radio"/> School District <input type="radio"/> Charter School/Other
State EIN:	149999999	System Mode:	Production
UI Employer Registration Number:			
Address Line 1:	10 SCHOOL WAY		
Address Line 2:	Ste. 207		
City:	NEW YORK		
State:	NY		
Zip:	14444		
Phone:	3155551212		
Fax:	3155555555		

Instructions for School Districts

School Districts should enter their BEDS code in the District BEDS Code field.

Then set the **Organization Type** radio button to School District.

Save the record.

Instructions for Charter Schools/Other

For Charter or Other Schools, be sure to set the Organization Type radio button to Charter School/Other. Then enter the Institution Code in the subsequent field, as shown in the illustration below.

System Options

File Edit Help

Update Save Save and Close

General Fiscal Years Bid Accounting Receivables HR Payroll Requisitioning System Configuration

Organization Name: Demo CSD

Federal ID: 149999999

District BEDS Code: 000000

State EIN: 149999999

UI Employer Registration Number:

Address Line 1: 10 SCHOOL WAY

Address Line 2: Ste. 207

City: NEW YORK

State: NY

Zip: 14444

Phone: 3155551212

Fax: 3155555555

Days to Notify of Password Expiration: 14

FM2004 Integration Enabled

Organization Type: ☐ School District ☒ Charter School/Other

Institution Code: 1234567

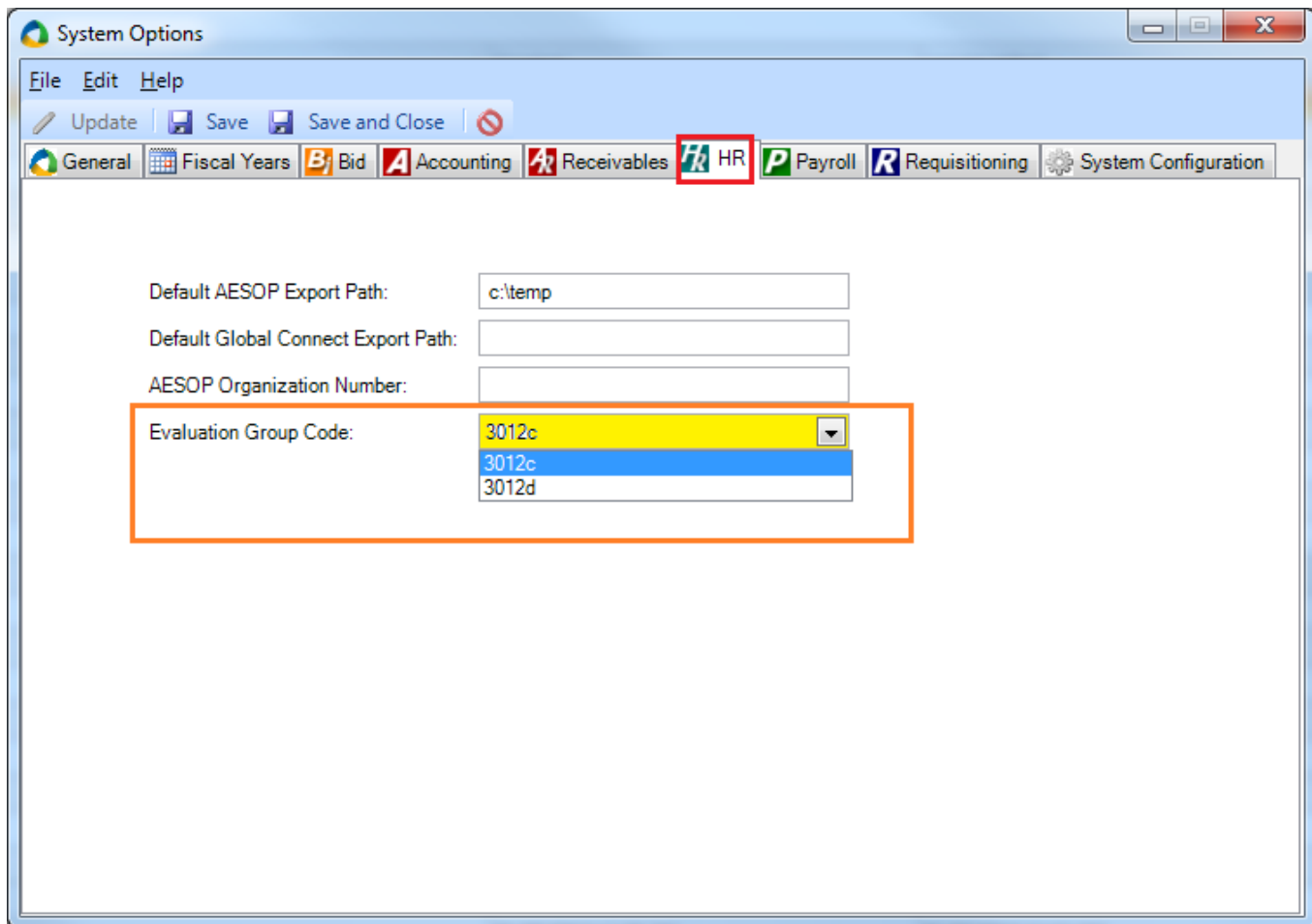
System Mode: Production

Save the record. Flagging your institution as a Charter or Other School and entering the Institution Code will allow the user to simply enter the employee's composite score on the Staff Evaluation Ratings window, in compliance with NYSED regulations.

Select the Appropriate Evaluation Group Code

The "Evaluation Group Code" field provides an option to select the applicable Education Law (3012c or 3012d). Based on the selected Education Law, nVision will determine the required elements for State Ed Staff Evaluation Rating reporting in the 2015-2016 school year. **NOTE:** Since NYS has NOT yet finalized all of the required elements as of February 2016, the functionality behind this will be added to the HR - Interfaces – State Ed Templates - Staff Evaluation Rating area at a later date.

In **nVision System Administration**, under the **Setup** menu tree, click **System Options**. Click the **HR** tab and enter **Update** mode.



The screenshot shows the "System Options" window with the "HR" tab selected. The "Evaluation Group Code" dropdown menu is open, displaying three options: "3012c", "3012c", and "3012d". The first "3012c" option is highlighted in yellow, and the second "3012c" option is highlighted in blue. The "3012d" option is also visible. The dropdown menu is outlined with an orange border.

Use the Evaluation Group Code drop-down arrow to choose the appropriate Education Law, 3012c or 3012d, which your organization adheres to.

Save the record.

Link NYSED Location Code to Building

In **nVision Payroll**, open the **Setup** menu tree. Then open the **Codes** submenu tree and click the **Buildings** option. Double-click on the appropriate building record in the listing. Then click **Update**.

Demo CSD - Building - ELEM SCHOOL #66

File Edit View Help

+ New Update Copy Save Save and Close X Search

Building **Address**

Active: ☒ Street: DEMO CENTRAL SCHOOLS

Building Name: ELEM SCHOOL #66 35 BROADWAY

Building Code: EL City: DEMOVILLE

Description: ELEM SCHOOL #66 ☒ State: NY

Phone: Postal Code: 11444

Fax: NYSED Location Code: 2804

Building Details

Contacts Locations Custom Fields

Search

Name	Description
▶ John Requirer	
*	

Identify the shipping contacts for this Building location.

Enter the NYSED Location Code. This is the SEDREF number for the building location to indicate the employee's primary building in the Staff Snapshot Extract File.

Save the record. Repeat for all building records.

Enter Teacher IDs

A valid **Teacher ID** number is a required element for the Staff Snapshot evaluation data extract. Therefore, the user must enter the number in the **Teacher ID** field in the employee demographic area in HR Employee Information as shown below.

Demo CSD - Employee - Teacher, John T

File Edit View Help

New Update Save Save and Close Notes* Search

Employee

EmployeeID:

Teacher ID:

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

SSN:

DOB: Age:

Gender:

Marital Status:

Hispanic/Latino: ☐

Ethnicity:

Status:
☒ HR Active
☒ PR Active
☐ Pending
☒ Retired

Photo

Add Photo
 Clear Photo

Employee Details

Personal Information
Professional Information
Appointment Information
Task Lists
File Attachments
Custom Fields
nVision Online

Addresses
Contact Information
Miscellaneous
Existing Dependents
Health Events
Health Notes
Retirement
Emergency Contacts
Fingerprinting

Search

Addresses

Type/Description	Address
Employee Summer Address	22 CENTRAL AVENUE LARGO, FL 33544
Employee (Default) Home Address	10 Smith Drive Latham, NY 12110-4555

Address Details

Description: Default: ☒

Street:

City:

State: Country:

Zip/Postal Code:

Flag Employee Groups as Reportable to Staff Snapshot and Position Title Entry

In **nVision Human Resources**, open the **Setup** menu tree. Then open the Codes and Types submenu tree and click the Employee Groups option.

Highlight the appropriate employee group record in the listing to review the record. Enter **Update** mode.

The screenshot shows a software window titled "Demo CSD - Employee Group - TCH". It has a menu bar (File, Edit, View, Help) and a toolbar with icons for New, Update, Copy, Save, Save and Close, and a search box. The main area is titled "Employee Group" and contains several input fields and checkboxes. On the left, fields include "Employee Group Code" (TCH), "Employee Group Name" (TEACHERS), "Seniority Unit" (Days), "Seniority Calc Method" (Calendar), "Days Worked Method" (Swaim), and "Bargaining Unit Code" (TCH). On the right, there are checkboxes for "Telephone Notification", "Instructional" (checked), "Report to Staff Snapshot" (checked), and "Substitute". A dropdown menu for "Substitute Employee Group" is open, showing a list of options: "Teacher", "Other", "Teacher" (highlighted), and "Principal".

Review the **Instructional** and **Report to Staff Snapshot** flag settings. Click **Update** to make any changes.

For State Ed Reporting purposes, the **Instructional** flag is used only for the Staff Evaluation process. Check the Instructional flag if APPR scores are to be reported for employees in this employee group during the Staff Evaluation Generation process. **NOTE:** The Instructional flag setting is NOT used in the Staff Snapshot, Staff Assignment, or Staff Tenure generation and export processes.

Check the **Report to Staff Snapshot** field if employees in this grouping should be included in the Staff Snapshot. If there is an individual employee(s) in this group who should NOT be reported to the Staff Snapshot, you can uncheck the Report to Staff Snapshot box in the employee record on the HR – Employee Information – Professional Information – Annual Performance Review – Snapshot Codes tab.

If the Report to Staff Snapshot field is checked, use the Position Title drop-down to designate employees in this employee group as either **Teachers**, **Principals**, or **Other**. 'Other' means that employees in this employee group need to be reported to Staff Snapshot, but will not generate into the Staff Tenure. The Position Title information is reported in field 8 or 105 of the APPR Staff Snapshot file. Be sure to **Save** any changes.

Review any other employee group records and make changes accordingly.

nVision automatically populates the Report to Staff Snapshot flag and Position Title from the employee's current, primary appointment employee group onto the HR – Employee Information – Professional Information – Annual Performance Review – Snapshot Codes window. However, the user has the ability to override the Report to Staff Snapshot and/or Position Title setting for any employee on the Employee Information – Professional Information – Annual Performance Review – Snapshot Codes window. Only those employees whose Employee Group is flagged to Report to Staff Snapshot and who have the Report to Staff Snapshot flag set on the Snapshot Codes window below are generated into the Staff Snapshot.

Demo CSD - Employee - Teacher, John T

File Edit View Help

+ New Update Save Save and Close Notes* Search

Employee

EmployeeID: 2 SSN: 222-23-3333

Teacher ID: 001234567 DOB: 01/01/1955 Age: 60.90


Prefix: Dr. Gender: Male

First Name: John Marital Status: Married

Middle Name: T Hispanic/Latino: ☐

Last Name: Teacher Ethnicity: White

Suffix: Status: ☒ HR Active ☒ PR Active ☐ Pending ☒ Retired

Photo  Add Photo Clear Photo

Employee Details

Personal Information Professional Information Appointment Information Task Lists File Attachments Custom Fields nVision Online

Certifications Education Degrees Licenses Professional Development Annual Performance Review

Snapshot Codes Additional Codes

Education Level Code: Masters+30 or more hours Yrs In District: 14.72

Professional Development Indicator: Yes Prior Employment Yrs: 6.00

ENYP Assignment Code: EDUCATOR Total Years Experience: 21

PMF Assignment Code: 1421 Contract Work Days: 200

Report To Staff Snapshot: ☒ Charter School Exemption: ☐

Position Title: Teacher

Review and Modify Attendance Code Records

The Attendance Code table has a new 'Staff Attendance Code' field used to categorize the types of absence (e.g., bereavement, jury duty, maternity/paternity, other, personal, or sick leave) reportable under the State Ed **Staff Attendance** Template. Be sure to review your attendance table records to make sure that the appropriate Staff Attendance Code information is filled in for each attendance code. Note that multiple different attendance codes can be grouped under the same Staff Attendance Code.

In **nVision Human Resources**, under the **Setup** menu tree, open the Codes and Types submenu tree and click the **Attendance Codes** option.

The screenshot shows a software window titled "Demo CSD - Attendance Code - Sick". It has a menu bar with "File", "Edit", "View", and "Help". Below the menu bar is a toolbar with icons for "New", "Update", "Copy", "Save", "Save and Close", and a search bar. The main area is titled "Attendance Code" and contains several fields: "Attendance Code:" with the value "Sick", "Attendance Description:" with the value "Employee Sick", "Charge to Attendance as:" with the value "<None>", "Unit Type:" with the value "Days", and "SubFinder Code:" with the value "SIC". To the right of these fields is a "Staff Attendance Code:" dropdown menu. The dropdown menu is open, showing a list of options: "<N/A>", "Bereavement Leave", "Jury Duty", "Maternity / Paternity Leave", "Other", "Personal Leave", and "Sick Leave". The "Sick Leave" option is highlighted in blue. A red rectangle is drawn around the "Staff Attendance Code:" label and the dropdown menu.

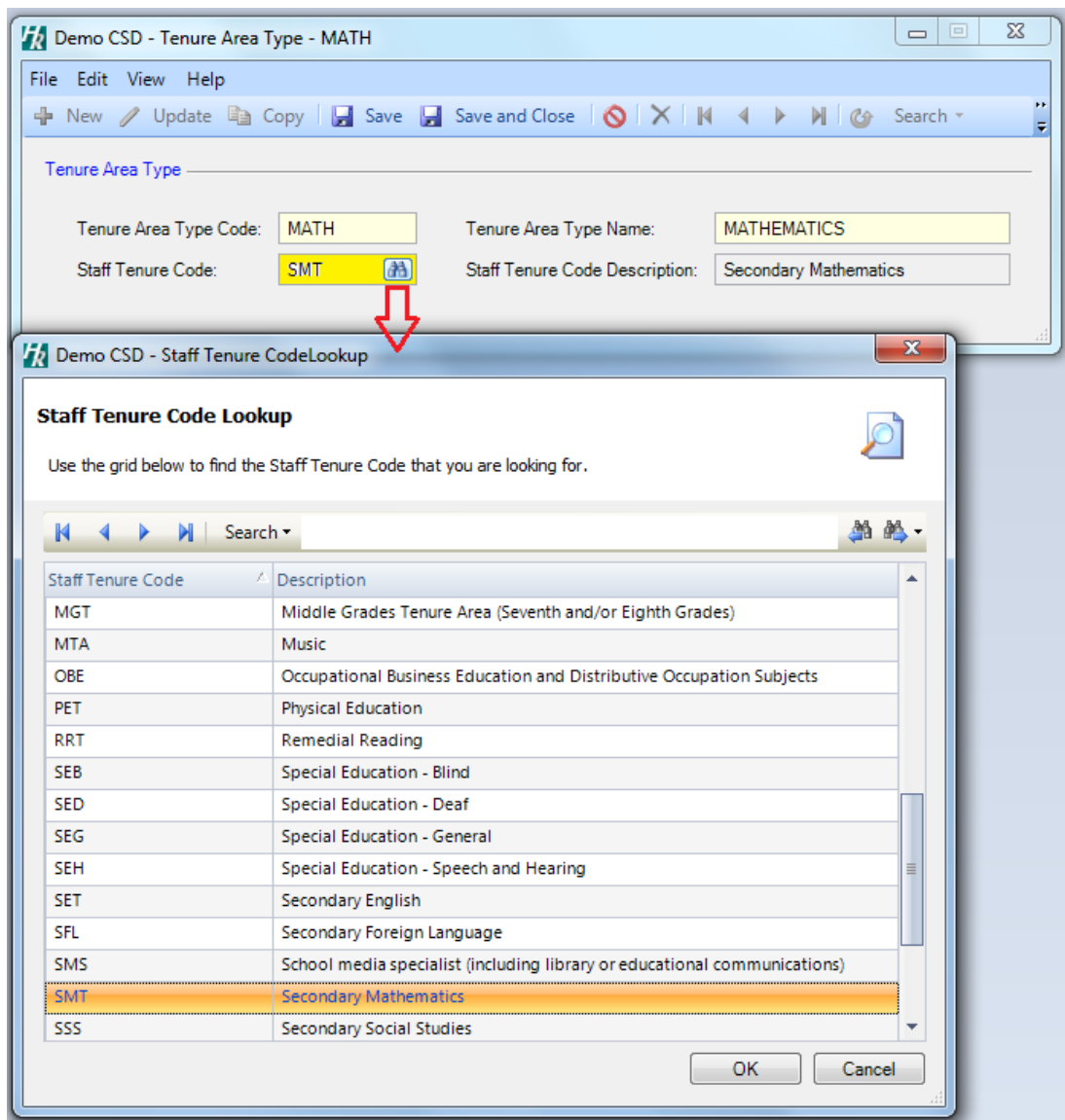
Highlight the attendance record, enter Update mode, and choose the Staff Attendance Code from the drop-down listing. Then **save** the record. Repeat this step for each attendance code record.

NOTE: If the attendance code should NOT be reportable to Staff Attendance, choose the '<N/A>' Staff Attendance Code.

Review and Modify Tenure Area Type Records

The Tenure Area Type table has a new 'Staff Tenure Code' field used to categorize the types of tenure (e.g., Art, Home Economics, Health, Industrial Arts, Music, Special Education, Secondary Math, etc.) reportable under the State Ed **Staff Tenure** Template. Be sure to review your tenure area type table records to make sure that the appropriate Staff Tenure Code information is filled in for each tenure area type. Note that multiple different tenure area type codes can be grouped under the same Staff Tenure Code.

In **nVision Human Resources**, under the **Setup** menu tree, open the Codes and Types submenu and click the **Tenure Area Types** option.



Highlight the tenure code record, enter Update mode, and choose a valid State Ed Staff Tenure Code from the lookup window. Then Save the record. Repeat this step for each tenure type code record.

NOTE: If the Staff Tenure Code field is left blank, the employee will be generated into the Staff Tenure with a blank Tenure Area Code.

Review and Modify Employee Tenure Records

For employees in Employee Groups flagged as Instructional, be sure to review tenure records to make sure that the appropriate tenure information is filled in for a successful Staff Tenure export. The Tenure Listing Report (Reports – Employee Reports – Tenure Listing) can be run to review the tenure information for your employees.

In nVision **Human Resources**, under the **Data Entry** menu tree, click the **Employee Information** option. If desired, filter the employee listing by Employee Group. Double-click the appropriate employee in the listing. Click the **Appointment Information** folder, then the **Tenure** tab.

Demo CSD - Employee - Teacher, John T

File Edit View Help

+ New Update Save Save and Close Notes* Search

Employee

EmployeeID: 2 SSN: 222-23-3333

Teacher ID: 001234567 DOB: 01/01/1955 Age: 60.88


Prefix: Dr. Gender: Male

First Name: John Marital Status: Married

Middle Name: T Hispanic/Latino: ☐

Last Name: Teacher Ethnicity: <N/A>

Suffix: Status: ☒ HR Active ☒ PR Active ☐ Pending ☒ Retired

Photo  Add Photo Clear Photo

Employee Details

Personal Information Professional Information Appointment Information Task Lists File Attachments Custom Fields nVision Online

Position Appointment Building Assignment Leave of Absence Evaluations Tenure Seniority Civil Service Attendance Balance Benefits

Search

Tenure Area Type	Tenure Status	Probation Start Date	Probation End Date	Tenure Date	Board Approved Date	Primary Tenure Area	Seniority Active	Principal	Active
▶ MATH		01/01/2000	12/31/2003	01/01/2004	12/31/2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click **Update** and enter all appropriate tenure information. Be sure that the correct Primary Tenure Area is flagged. **Save** the record.

Link SED Separation Code to the Appropriate Leave Type Records

In **nVision Human Resources**, under the **Setup** menu tree, open the **Codes and Types** submenu. Click the **Leave Types** option. Double-click on the appropriate leave type code in the listing. Then enter **Update** mode.

The screenshot shows a software window titled "Demo CSD - Leave Type - Resigned". It has a menu bar with "File", "Edit", "View", and "Help". Below the menu bar is a toolbar with icons for "New", "Update", "Copy", "Save", "Save and Close", and a red "X" icon. The main area of the window is titled "Leave Type" and contains a form. The form has the following fields and options:

- Leave Type Name:** A text box containing "Resigned".
- Description:** An empty text box.
- Attendance Code:** An empty text box with a small icon to its right.
- SED Separation Code:** A dropdown menu with a yellow background. The dropdown is open, showing a list of options: "RES" (highlighted in blue), "RET", "PRT", and "OTH".
- Checkboxes:** On the right side of the form, there are three checkboxes:
 - ☒ Permanent
 - ☐ Compensated
 - ☒ Affects Seniority

Use the drop-down to link the appropriate SED Separation Code to the selected leave type. Then **Save** the record.

Repeat these steps for each leave type record.

Separation code information is reported in Field 54 on the Staff Snapshot File.

Complete the Employee Staff Template Fields

Required fields must be completed for the purpose of tracking and reporting Staff Snapshot and Staff Assignment information.

Under the **Data Entry** menu tree in **nVision Human Resources**, click the **Employee Information** option. Filter the listing window by Employee Group then, for those employee groups reportable to Staff Snapshot, double-click the appropriate employee in the listing.

Employee

EmployeeID: 2 SSN: 222-23-3333

Teacher ID: 001234567 DOB: 01/01/1955 Age: 60.36

Prefix: Dr. Gender: Male

First Name: John Marital Status: Married

Middle Name: T

Last Name: Teacher

Suffix:

Hispanic/Latino: ☐ Ethnicity: White

Status: ☒ HR Active ☒ PR Active ☐ Pending ☒ Retired

Photo: [Placeholder]

Add Photo Clear Photo

Employee Details

Personal Information Professional Information Appointment Information Task Lists File Attachments Custom Fields nVision Online

Addresses Contact Information Miscellaneous Existing Dependents Health Events Health Notes Retirement Emergency Contacts Fingerprinting

Addresses

Type/Description	Address
Employee Summer Address	22 CENTRAL AVENUE LARGO, FL 33544
Employee (Default) Home Address	10 Smith Drive Latham, NY 12110-4555

Address Details

Description: Home Address Default: ☒

Street: 10 Smith Drive

City: Latham

State: NY Country: US

Zip/Postal Code: 12110-4555

1. Enter **Update** mode.
2. Check the box if the staff member is **Hispanic/Latino**. This is an optional field for Teaching and Non-Teaching professionals. The information in this field is reported in field 69 of the Staff Snapshot Extract File. If this box is checked, enter the Ethnicity in the next field.
3. Use the drop-down to indicate the primary **ethnicity** of the staff member. The drop-down provides the following entries:
 - <N/A>
 - American Indian or Alaska Native
 - Asian
 - Black or African American
 - Native Hawaiian/Other Pacific Islander
 - White

This field is in compliance with the changes in federal requirements for reporting racial data. At the present time, this is an optional field for Teaching and Non-Teaching Professionals. If entered, the information in this field is reported in field 21 of the Staff Snapshot Extract File. **NOTE:** If additional ethnicity codes are needed for this employee, they can be entered on the Annual Performance Review – Additional Codes tab under the Professional Information folder.


- Click the Professional Information folder, then the Annual Performance Review tab, then Snapshot Codes.

The screenshot shows the 'Employee Details' window with the 'Professional Information' tab selected. Within this tab, the 'Annual Performance Review' sub-tab is active. The 'Snapshot Codes' section is highlighted with a red box. The form contains the following fields and values:

Education Level Code	Masters+30 or more hours	Staff Snapshot Start Date	07/01/2000
Professional Development Indicator	Yes	Staff Snapshot Years In District	14.23
PMF Assignment Code	1421	Prior Employment Yrs	6.00
Report To Staff Snapshot	<input checked="" type="checkbox"/>	Total Years Experience	21
Position Title	Teacher	Contract Work Days	200
		Charter School Exemption	<input type="checkbox"/>

Use the drop-down to specify the **education level** currently held by the staff member. This field is applicable for Teaching and Non-Teaching professionals. The information in this field is reported in field 108 of the Staff Snapshot Extract File. The drop-down provides the following entries:

- Associate degree
- Bachelors degree
- Bachelors+30 or more hours
- Doctorate
- Freshman year completed
- Junior year completed
- Masters degree
- Masters+30 or more hours
- No higher education
- Sophomore year completed

- Use the drop-down to indicate whether the staff member achieved high-quality **professional development** during the school year. This field is applicable for teaching staff only. The information in this field is reported in field 111 of the Staff Snapshot Extract File. Valid entries are as follows:
 - Yes
 - No
 - <N/A> Not Applicable (pertains to first-year teachers, teachers on leave, or teachers who had only non-teaching assignments)
- Use the lookup  to choose the primary **PMF Assignment Code** for non-teaching staff members (including building principals) who must be reported for the Personnel Master File (PMF) BEDS collection. This code is used in the reporting of the Staff Assignment Template. Since it is possible for an employee to have more than one PMF assignment code, if additional codes are needed, they may be entered by clicking the **Additional Codes** folder and then the **PMF** tab.

NOTE: If an employee works with or is responsible for ALL GRADE LEVELS for the entire location, one PMF assignment record can be created for the employee. If the staff person works with or is responsible for only some, but NOT ALL grade levels within the building, one PMF assignment record should be reported for each grade level. Therefore, it is possible for an employee to have more than one of the same PMF assignment code, where each one will be linked to a different grade level through the Staff Assignment window.

Example:

If the employee's PMF Assignment Code is 2209 (Nurse Practitioner) and he/she is responsible for ALL GRADE LEVELS for the entire location, create ONE PMF Assignment record for 2209 (Nurse Practitioner).

If the employee's PMF Assignment Code is 2109 (Middle School Counselor), but he/she is only responsible for the 7th and 8th GRADE LEVELS, create TWO PMF Assignment records for 2109 (Middle School Counselor). Two records will then be created for the employee during the Staff Assignment generation process, where grade level '07' can be linked to the first assignment record and grade level '08' can be linked to the second assignment record.

7. nVision automatically populates the Report to Staff Snapshot flag and Position Title on the Annual Performance Review – Snapshot Codes window with the same settings defined for the employee group linked to the employee primary appointment.

The **Report to Staff Snapshot** and **Position Title** fields allow an employee override to the global Report to Staff Snapshot and Position Title fields in the Employee Groups Setup table. If the Employee Group Setup table has a specific group flagged as reportable to Staff Snapshot, but there is an individual employee(s) in this group who should NOT be reported to the Staff Snapshot, uncheck the Report to Staff Snapshot box in the employee record.

Uncheck the **Report to Staff Snapshot** box if this employee should NOT be reported in the Staff Snapshot.

OR

Check the box if this employee SHOULD be reported in the Staff Snapshot. Then, using the drop-down, choose the appropriate **Position Title** for the selected employee - **Teacher**, **Principal**, or **Other**. Other means that this employee is neither a Teacher nor Principal, but needs to be reported to the Staff Snapshot. 'Other' employees will not generate into the Staff Tenure. This information is reported in fields 8 and 105 of the APPR Staff Snapshot file. Note that only those employees whose Employee Group is flagged to Report to Staff Snapshot and who have the Report to Staff Snapshot flag checked on the Snapshot Codes window in Employee Information are generated into the Staff Snapshot.

8. Enter/change the **Staff Snapshot Start Date** as needed. If left blank, the appointment start date is used. This is the date that will be generated into the Teacher or Principal Hired Date field, whichever is applicable, in the Staff Snapshot.
9. nVision automatically calculates the **Staff Snapshot Years in District**, which is the cumulative number of years the staff member has worked in the current district. The information is applicable for Teaching and Non-Teaching professionals and is reported in field 43 of the Staff Snapshot Extract File. Note that the current year counts as one full year of experience in the district.

The **Staff Snapshot Years in District** is calculated as follows:

If there is both a Termination Date and a Staff Snapshot Start Date, the calculation is:

(difference in years between the Staff Snapshot Start Date and Termination Date) + (difference in years between the Latest Hire Date and Current Date)

If there is no Termination Date but an existing Staff Snapshot Start Date, the calculation is:

(difference in years between the Staff Snapshot Start Date and Current Date) + (difference in years between the Original Hire Date and Current Date)

If there is a Termination Date and no Staff Snapshot Start Date, the calculation is:

(difference in years between the Primary Appointment Start Date and Termination Date) + (difference in years between the Latest Hire Date and Current Date)

If there is no Termination Date and no Staff Snapshot Start Date, the calculation is:
 (difference in years between the Primary Appointment Start Date and Current Date) + (difference in years between the Original Hire Date and Current Date)


10. For review purposes only, nVision displays the number of **Prior Employment Years**, as entered and saved on the Miscellaneous tab under the Personal Information folder. The Prior Employee Years represents all the combined years of educational teaching experience OUTSIDE of the current district.
11. nVision automatically calculates the **Total Years Experience** for this staff member. This number is the sum of the **Staff Snapshot Years in District** plus **Prior Employment Yrs** (rounded up or down to a whole number). Note that the current year counts as one full year of experience. This information is applicable for Teaching and Non-Teaching professionals and is reported in field 102 of the Staff Snapshot Extract File.
12. nVision automatically populates the Contract Work Days based on the number of Standard Days in the Employee Appointment.
 Enter the **Contract Work Days** this staff member is expected to work in the teaching appointment. This field is applicable for teachers only. The information in this field is reported as a whole number in field 53 of the Staff Snapshot Extract File.
13. For those institutions flagged as **Charter Schools**, check the box to indicate that the staff member is **exempt** based on the NYS Education Certification law. The information is applicable for Charter School teachers only and is reported in field 112 of the Staff Snapshot Extract File.
14. **Save** the record. A completed screen is shown as follows:

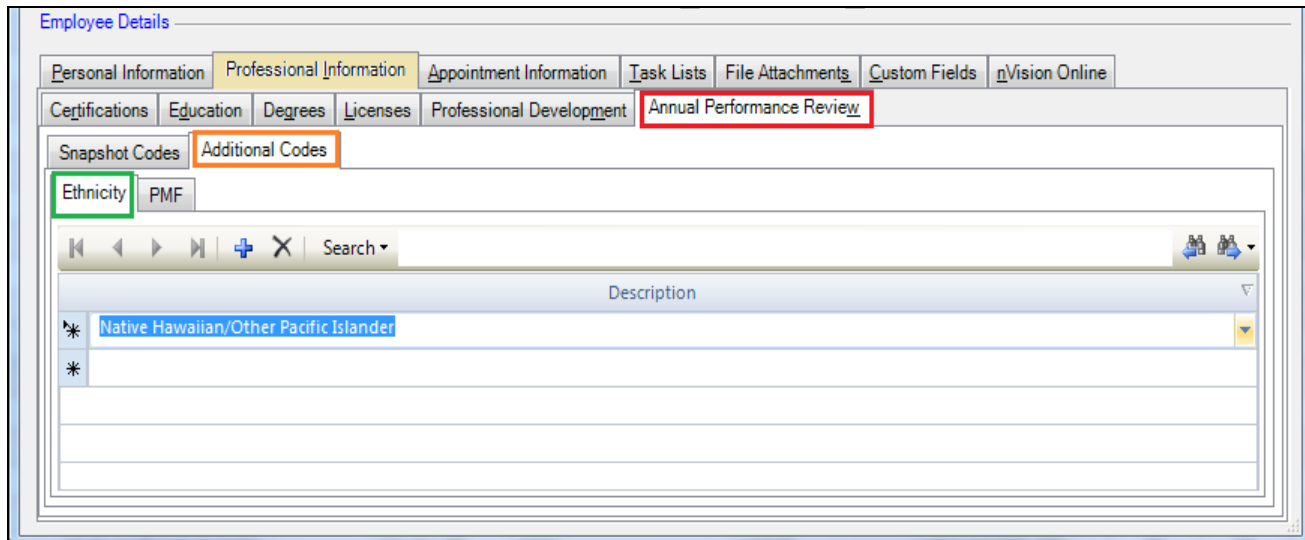
The screenshot shows the 'Employee Details' form with the 'Professional Information' tab selected. Within this tab, the 'Annual Performance Review' sub-tab is active. The form contains the following fields and values:

Field	Value
Education Level Code	Masters+30 or more hours
Professional Development Indicator	Yes
PMF Assignment Code	1421
Report To Staff Snapshot	<input checked="" type="checkbox"/>
Position Title	Teacher
Staff Snapshot Start Date	07/01/2000
Staff Snapshot Years In District	14.23
Prior Employment Yrs	6.00
Total Years Experience	21
Contract Work Days	200
Charter School Exemption	<input type="checkbox"/>

To Add More Ethnicity Codes:


Click the **Additional Codes** folder. Enter additional ethnicity codes for the employee if needed. Up to 5 ethnicity codes can be entered per employee. The information in this window is reported in fields 78 through 81 of the Staff Snapshot Extract File.

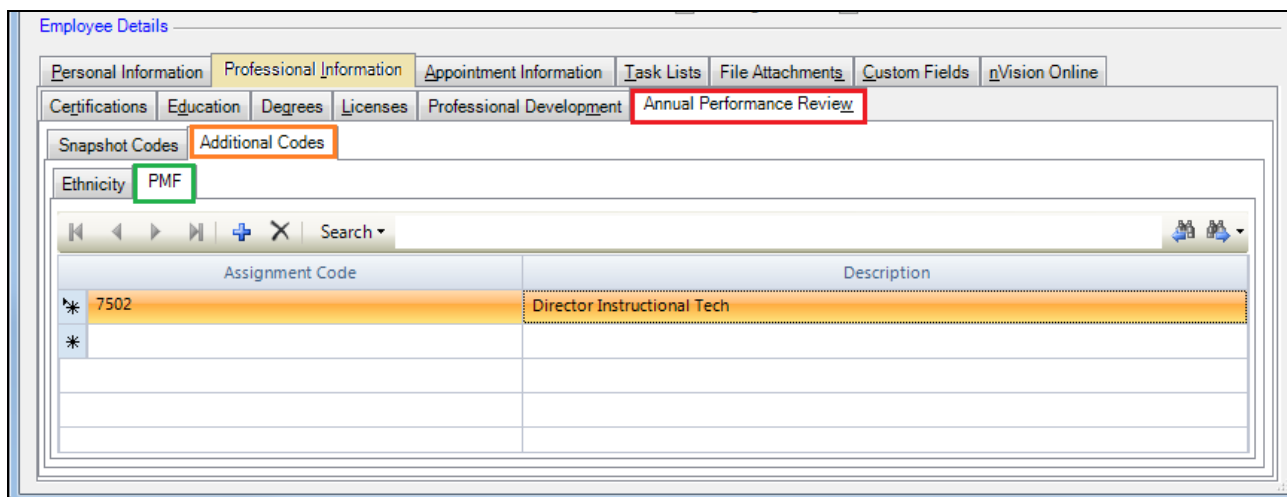
1. Under the **Annual Performance Review** tab, click the **Additional Codes** folder. Then click the **Ethnicity** tab.
2. Enter **Update** mode. Click the **Add**  button on the Ethnicity tab. **NOTE:** This Add button will only be enabled if a primary Ethnicity was selected in the employee demographics area at the top of the window.
3. Use the drop-down to enter a secondary ethnicity code(s) for the selected employee. Repeat this step until you have added all necessary race codes for this employee.
4. **Save** the record.



The screenshot shows the 'Employee Details' window with the 'Annual Performance Review' tab selected. The 'Additional Codes' folder is highlighted, and the 'Ethnicity' sub-tab is active. The 'Description' field is populated with 'Native Hawaiian/Other Pacific Islander'. The 'Add' button (a blue plus sign) is visible in the toolbar above the list.

To Enter More PMF Codes:

1. Under the **Annual Performance Review** tab, click the **Additional Codes** folder. Then click the **PMF** tab.
2. Enter **Update** mode. Click the **Add**  button on the PMF tab. **NOTE:** This Add button will only be enabled if a primary PMF Code was selected on the Snapshot Codes window.
3. Use the lookup to enter a secondary PMF assignment code(s) for the selected employee. Repeat this step until you have added all necessary PMF codes for this employee.
4. **Save** the record.

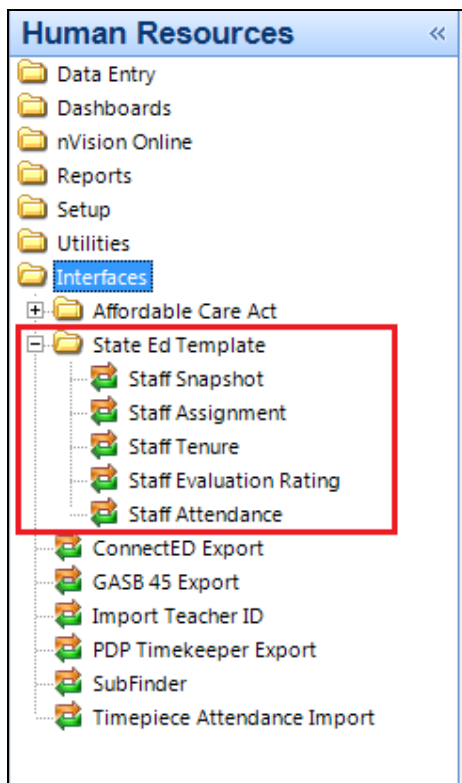


The screenshot shows the 'Employee Details' window with the 'Annual Performance Review' tab selected. Within this tab, the 'Additional Codes' folder is highlighted, and the 'PMF' sub-tab is active. A table displays the following data:

Assignment Code	Description
7502	Director Instructional Tech

nVision Human Resources – Interfaces – State Ed Template

In nVision Human Resources, open the Interfaces menu tree and the State Ed Template submenu.



The following five templates are available:

The **Staff Snapshot** must be generated before any other staff record type for an individual can be reported (i.e., Staff Assignment, Staff Tenure, and Staff Evaluation Rating). Staff data is reported to meet requirements related to APPR.

The **Staff Assignment** collects data for PMF and APPR purposes. It allows for an employee who works with or is responsible for ALL grade levels within a building to be reported under a single assignment record with the grade level "ALL" OR for an employee who works with or is responsible for only specific grade levels within the building to be reported under multiple assignment records, each linked to a different grade level.

The **Staff Tenure** includes each employee's current tenure status as teacher and/or principal, effective date of the tenure status, and when their probation ends.

The **Staff Evaluation Rating** includes the overall evaluation rating category (highly effective, effective, developing, or ineffective), the total composite effectiveness score, and subcomponent scores (state, local, and other) for each employee who is part of an APPR plan.

The **Staff Attendance** collects all required teacher attendance information from the employee record, based on a selected fiscal year, and prepares it for export.

Staff Snapshot

The Staff Snapshot reports staff data necessary to meet Annual Professional Performance Review (APPR) requirements. The staff snapshot record must be generated before any other staff record type for an individual can be reported (i.e., Staff Assignment, Staff Tenure, and Staff Evaluation Rating).

In nVision Human Resources, under the Interfaces menu tree, open the State Ed Template submenu and click the Staff Snapshot option. The Staff Snapshot window displays.

[illegible]

All of the Staff Snapshot options are displayed across the top of the window. The options in this routine are as follows:

The **Generate** option pulls all required Staff Snapshot information, based on a selected fiscal year, from the employee record and prepares it for export. The generation process INCLUDES employees with appointments having earning methods that are Annualized, Contractual, Daily, and Hourly.

The **Export File** option exports the generated Staff Snapshot information for a selected fiscal year into an output file.

The **Snapshot Report** option prints the staff snapshot based on specified criteria.

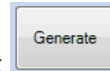
The **Diagnostic Report** option can be run after the Staff Snapshot information has been generated and updated. This option produces a report of any required Staff Snapshot information that may be missing.

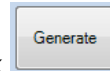
The **Template Import** option is used to import Staff Template information from your Student Information Repository file into nVision. The file must be an Excel® file that has been saved as a .CSV file.

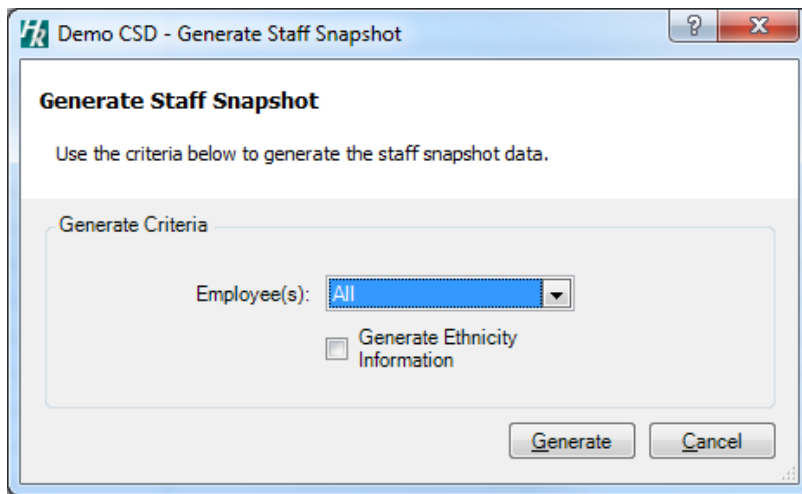
The **Template Field Listing** option prints a report that lists all staff snapshot fields and their locations in nVision, which is run to ensure that all required template fields are completed for a successful Staff Snapshot Export.

Generate Staff Snapshot


The first step is to generate the staff snapshot. Once generated, Staff Snapshot information is stored in nVision by fiscal year.



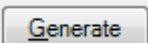
Choose the appropriate fiscal year end from the drop-down on the Staff Snapshot window and click . The Generate Staff Snapshot window displays.



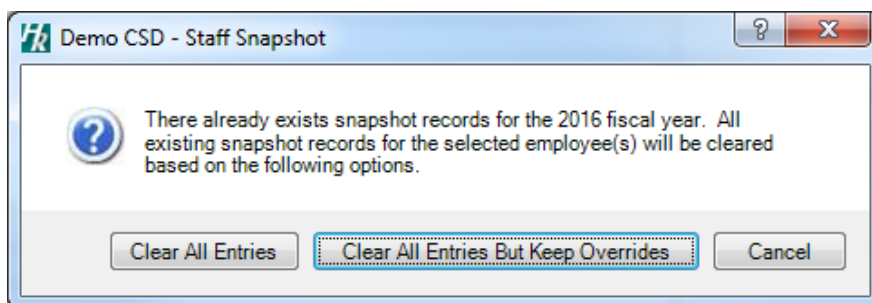
The Generate process includes employees with appointments having earning methods that are Annualized, Contractual, Per Diem, and Hourly. Employees with a Position Title of 'Other' need to have a PMF code in order to be generated into the Staff Snapshot.

Select the **employee(s)** to be included in the report. Choose **All** to report on all employees. Use the drop-down to change the option to **Selection**; then use the search  to select one or a range of employees.

Check the **Generate Ethnicity Information** box to report the employee's Hispanic flag and Race. At the present time, the Race code and Hispanic flags are optional fields. If you have defined the Hispanic flag and/or Race for ALL your employees, check the box. If you have not entered the Hispanic/Latino flag and/or Race for ALL your employees in the Employee Information window, leave the box unchecked.

Click .

If snapshot records were already generated for the selected fiscal year, the following message displays:



Clear All Entries

Click **Clear All Entries** to purge and recreate Staff Snapshot Records, even those where manual changes were already made. Use this option if snapshot records were already generated and you have made changes in the employee's record in HR Employee Information that need to be generated in.

Clear All Entries But Keep Overrides

Click **Clear All Entries But Keep Overrides** to purge and recreate Staff Snapshot records, except those where entries were already overwritten. This option will NOT remove any entries in any *existing snapshot records where the Overridden flag is checked*.

Cancel

Click **Cancel** to leave all original entries as is.

Staff Snapshot

Fiscal Year: 07/01/2015 - 06/30/2016

Generate

Export File

Snapshot Report

Diagnostic Report

Template Import

Template Field Listing

Search

Drag a column header here to group by that column.

Last Name	First Name	Employee ID	Date of Birth	Location	Status
Aaron	Gene	23	08/22/1965	0000	Active
Administrator	Jill	8	09/28/1975	7471	Active
Administrator	Alan	12	08/25/1952	7471	Active
Amsterdam	Jack	1283	08/04/1959	3366	Active
Newemployee	Gerald	44	08/12/1980	9987	Active
Newteacher	Rhonda	25	01/15/1965	3366	Active
Newteacher	Diane	1276	05/10/1960	3366	Active
Principal	Howard	37	08/22/1949	0000	Active
Principal	Jamie	38	07/15/1970	2804	Active
Principal	Kenneth	39	10/15/1949	3366	Active
Principal	Matthew	41	08/12/1965	3366	Active
Smith	John	1	05/30/1977	3366	Inactive
Teacher	John	2	01/01/1955	2804	Inactive
Teacher	Samantha	10	05/25/1956	2804	Active
Teacher	Diane	1279	09/10/1971	7471	Active
Teacher-New	Joanne	17	05/22/1956	3366	Active

To view a snapshot record, double-click on the appropriate employee name.

Demo CSD - Staff Snapshot - Aaron, Gene A

File Edit View Help

Update Save Save and Close Search

Staff Snapshot

Name:	Aaron, Gene A	Email:	gaaaron@demoschool.org	Status:	Active
Employee ID:	23	Position Title:	Teacher	Teacher Hired:	01/12/2005
Gender:	Male	Principal Title:		Principal Hired:	
Teacher ID:	001523455	Annual Salary:	61,000	P D Indicator:	Yes
Location:	0000	Contract Months:	10	Certification Exemption:	
Date Of Birth:	08/22/1965	Contract Work Days:	210	Exit Date:	
Hispanic / Latino	<input type="checkbox"/>	Staff Ed Level:	Masters +30	Separation Reason:	
Ethnicity:		Employment Basis:	1.000	Prior Years Experience:	
2nd Ethnicity:		District:	NY123456	+ Experience In District:	12
3rd Ethnicity:		Snapshot Date:	06/30/2016	Years Of Teaching Experience:	12
4th Ethnicity:		Date Created:	06/06/2016		
5th Ethnicity:		Overridden	<input checked="" type="checkbox"/>		

The information generated into the Staff Snapshot window defaults from multiple locations, within both the employee's record and the setup tables. Note that if the information is NOT in the appropriate areas, it will NOT be included into the record. If needed, you can delete an employee Staff Snapshot record, or simply enter required information in the employee record and/or maintenance tables, and then re-generate the Staff Snapshot.

The following is a listing of fields on the Staff Snapshot window and the location in nVision where the data is stored:

Field Name		nVision Location Where Data is Stored
Name	Employee ID	Employee demographic window in Employee Information
Gender	Teacher ID	
Date of Birth	Hispanic/Latino	
Ethnicity		
Location		The NYSED location code linked to the primary building in which the employee works. nVision looks at the employee building code, as entered on the Appointment Information – Building Assignment window in Employee Information. The Location Code linked to that building is then pulled from Payroll Building Codes Setup. Note that if an employee works in 2 buildings, the Location Code is displayed as 0000.
Additional Ethnicity codes (2 thru 5)		Professional Information – Annual Performance Review – Additional Codes –Ethnicity tab in Employee Information.
Email Address		Personal Information – Contact Information tab in Employee Information
Position Title		Position Title of 'Teacher' or 'Other', from the Position Title field on the HR – Employee Information - Professional Information – Annual Performance Review tab
Principal Title		Position Title of 'Principal', from the Position Title field on the HR – Employee Information - Professional Information – Annual Performance Review tab
Annual Salary		The FTE Amount for Contractual and Annualized employees, as entered on the Appointment Earnings window in Employee Payroll Information. For Hourly and Per Diem employees, the Daily Rate is shown as per NY State requirements. For Hourly employees, the Daily Rate is the Standard Hours on the Primary Appointment times the Hourly Rate. nVision will generate only the Annual Salary for those employees where the Report to Staff Snapshot flag is set on the HR – Employee Information - Professional Information – Annual Performance Review tab
Employment Basis Contract Months		The Overall FTE and Months/Year on the Appointment window in Employee Payroll Information.
Contract Work Days		Number of contract work days from the HR Employee Information – Professional Information - Annual Performance Review – Snapshot Codes window.

Field Name	nVision Location Where Data is Stored
Staff Ed Level	The Education Level Code field entry from the Professional Information – Annual Performance Review tab in Employee Information. The codes are defined as follows: No Higher Education – 0 Freshman Year Completed – 1 Sophomore Year Completed – 2 Associate Degree – 3 Junior Year Completed – 4 Bachelors Degree – 5 Bachelors +30 or more hours – 6 Masters Degree – 7 Master's +30 or more hours – 8 Doctorate – 9
District	If your institution is flagged as a School District, this field defaults to "NY + first 6 digits of the BEDS Code" (from Tools – System Options – General folder). If your institution is flagged as a Charter School/Other, this field defaults to "8 + last 7 digits of the Institution Code" (from Tools – System Options – General folder).
Snapshot Date	June 30 of the selected fiscal year.
Date Created	Date the snapshot record was created in the selected fiscal year.
Status	Valid entries are Active, Inactive, or Delete. A staff snapshot record can be flagged with a 'Delete' status if a staff member was already erroneously reported to the NYSED. This Delete status denotes to the NYSED that the staff member should never have been reported.
Teacher Hired	On the HR – Employee Information - Professional Information – Annual Performance Review tab, if the Report to Staff Snapshot flag is checked and a Position Title of "Other" or "Teacher" is entered, this entry is either the Staff Snapshot Start Date (from the Professional Information – Annual Performance Review tab) or the Teacher Appointment Start Date from the Position Appointment window in HR Employee Information.
Principal Hired	On the HR – Employee Information - Professional Information – Annual Performance Review tab, if the Report to Staff Snapshot flag is checked and a Position Title of "Principal" is entered, this entry is either the Staff Snapshot Start Date (from the Professional Information – Annual Performance Review tab) or the Principal Appointment Start Date from the Position Appointment window in Employee Information.

Field Name	nVision Location Where Data is Stored
P D Indicator Certification Exemption	Professional Development Indicator and Charter School Exemption, as entered on the Professional Information – Annual Performance Review tab in Employee Information.
Exit Date Separation Reason	The Termination Date is pulled from the Personal Information – Miscellaneous tab in Employee Information. The Separation Reason is the SED Separation Code linked to the Termination Leave Type, based on the entry in the Termination Reason field on the Personal Information Miscellaneous tab in Employee Information.
Prior Years Experience Experience in District Years of Teaching Experience	The number of past years experience (outside the district) and years experience within the district, from the Professional Information – Annual Performance Review tab in Employee Information. The sum of the two equals the total Years of Teaching Experience.

You do not have the ability to add a new record on this window. You may only Update or Delete a record as needed.

Overwriting Default Information

On the Staff Snapshot window, the **Update** button allows you to update all fields, except the employee name, employee ID, gender, teacher ID, location, date of birth, email, district, snapshot date, and date created. Be aware that changing information on the Staff Snapshot window will NOT change any information on the HR Employee Information Staff Template window. When any of the system-generated snapshot information is changed, the Overridden flag is checked to denote that the snapshot record was modified for an employee. When re-generating an existing snapshot record where the Overridden flag is checked, the **Clear All Entries but Keep Overrides** option will NOT remove any changed entries in that record.

If an employee was a teacher and later became a principal, update the employee record and enter the titles and applicable hired dates, as shown in the example below. The Position and/or Principal Title may be left blank if needed.

Demo CSD - Staff Snapshot - Aaron, Gene A

File Edit View Help

Update Save Save and Close Search

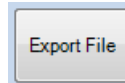
Staff Snapshot

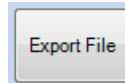
Name: Aaron, Gene A	Email: gaaaron@demoschool.org	Status: Active
Employee ID: 23	Position Title: Teacher	Teacher Hired: 01/12/2005
Gender: Male	Principal Title: Principal	Principal Hired: 09/03/2006
Teacher ID: 001523455	Annual Salary: 60,897	P D Indicator: Yes
Location: 0000	Contract Months: 10	Certification Exemption:
Date Of Birth: 08/22/1965	Contract Work Days: 210	Exit Date:
Hispanic / Latino <input type="checkbox"/>	Staff Ed Level: Masters +30	Separation Reason:
Ethnicity:	Employment Basis: 1.000	Prior Years Experience:
2nd Ethnicity:	District: NY123456	+ Experience In District: 12
3rd Ethnicity:	Snapshot Date: 06/30/2016	Years Of Teaching Experience: 12
4th Ethnicity:	Date Created: 06/07/2016	
5th Ethnicity:	Overridden <input checked="" type="checkbox"/>	

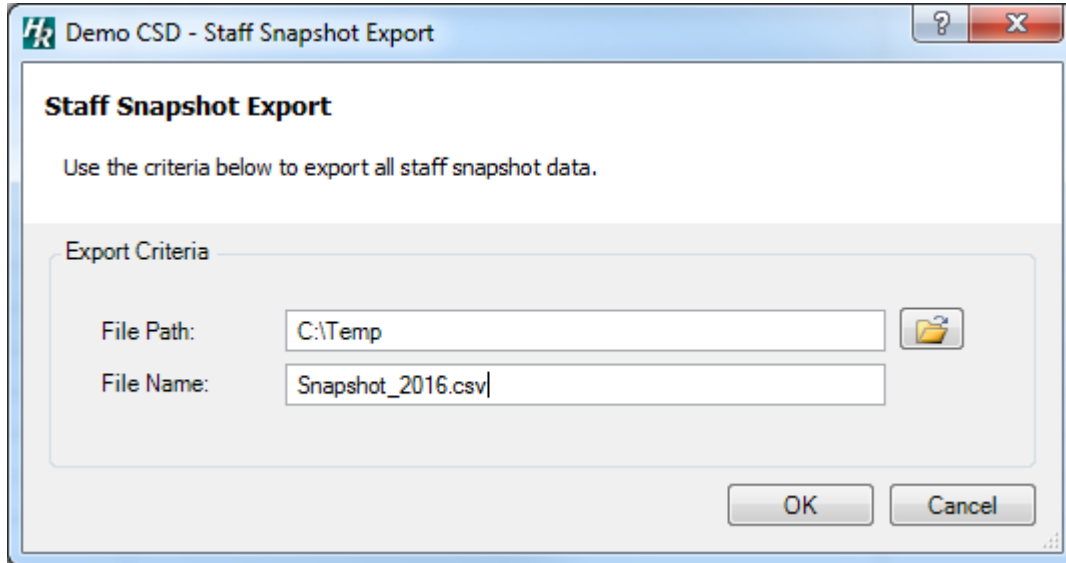
If the employee record should not be included in the Staff Snapshot, highlight the record and click **Delete**.


Staff Snapshot information is stored in nVision by fiscal year.

Staff Snapshot Export File



Making sure the correct fiscal year is selected on the Staff Snapshot window, click . The Create Staff Snapshot Extract File window displays.

A screenshot of a Windows-style dialog box titled "Demo CSD - Staff Snapshot Export". The dialog has a blue title bar with a question mark icon and a close button (X). The main content area has a light gray background. At the top, it says "Staff Snapshot Export" in bold, followed by the instruction "Use the criteria below to export all staff snapshot data." Below this is a section titled "Export Criteria" with a light gray background. Inside this section, there are two text input fields. The first is labeled "File Path:" and contains the text "C:\Temp". To the right of this field is a folder icon button. The second is labeled "File Name:" and contains the text "Snapshot_2016.csv". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

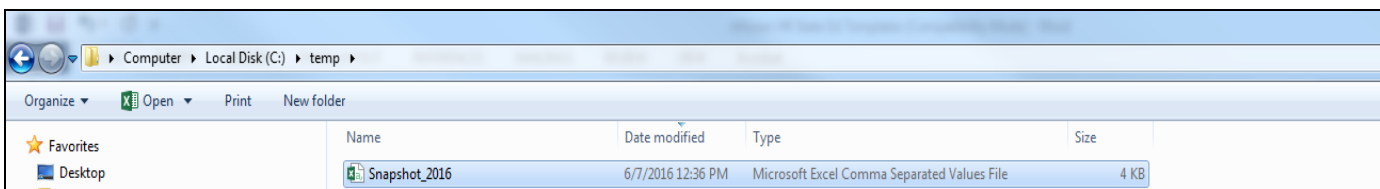
Change the default **path** and **name** of the export file. This output location is where nVision will place the data file which can be opened and viewed upon completion of the export. Click  to change the path of the file. The file will be a data file with the naming convention "Snapshot_FiscalYearEnd(YYYY format)" and the extension ".csv".

Click **OK**.

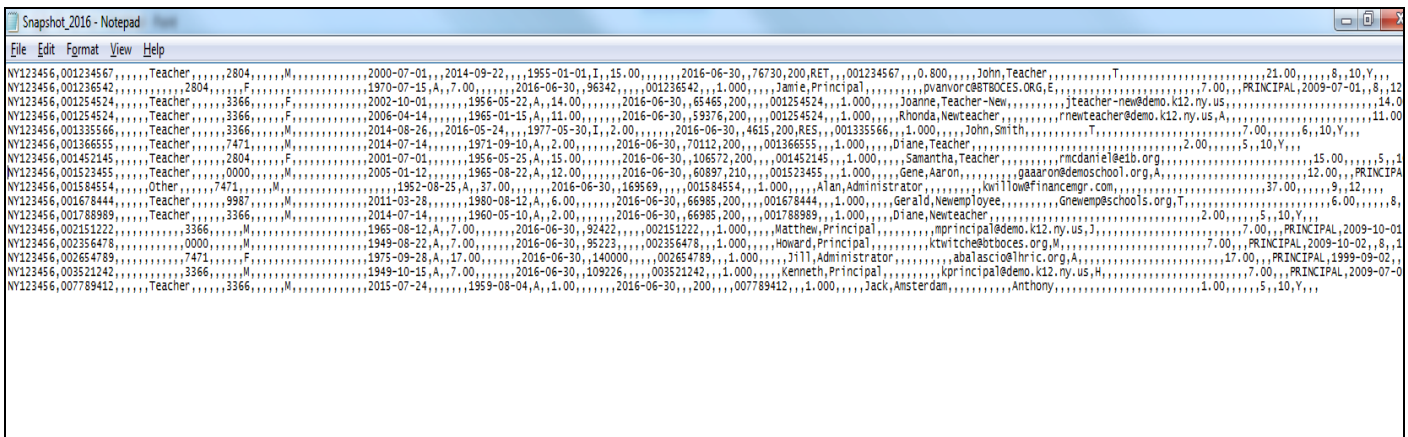


Click OK at the prompt.

Open the path of the output destination. In our example, we used the default output destination c:\temp.



Right click on the name and Open with Notepad to review the contents of the comma separated value (csv) file.



The data file contains those employees who have an appointment that falls within the fiscal year in the drop-down and the Report to Staff Snapshot box checked on the HR Employee Information – Professional Information - Annual Performance Review – Snapshot Codes window.

Each record includes the following information (As per NYSED specifications):

Remember that each field in the file is separated by a comma.


Field 1	'NY' + first six digits of the BEDS code if the facility is a School District; '8' + last seven digits of the Institution Code if the facility is designated a Charter School/Other
Field 2	Teach ID (nine numeric characters, left-padded with zeros)
Fields 3 thru 7	Blank
Field 8	'TEACHER' if employee is a teacher (from Position Title field on the HR Employee Information – Professional Information - Annual Performance Review – Snapshot Codes window); else blank.
Fields 9 thru 13	Blank
Field 14	NYSED Location Code (from Buildings Codes Setup) that is linked to the Employee's Primary Building. If the employee works in more than one building, the building code is filled with 0000. If the NYSED Location Code in Buildings Codes Setup is blank, the Building Code is blank.
Fields 15 thru 19	Blank
Field 20	Gender (M or F)
Field 21	Race Code (I, A, B, P, W, or <N/A>, where I - American Indian or Alaska Native, A – Asian, B – Black or African American, P – Native Hawaiian/Other Pacific Islander, W – White, <N/A> - Undefined) NOTE: The code is only displayed if the Generate Ethnicity Information box is checked when generating the Staff Snapshot.
Fields 22 thru 32	Blank
Field 33	Teacher Appointment Start Date. Populated from the Staff Snapshot Start Date field on the HR Employee Information – Professional Information – Annual Performance Review – Snapshot Codes window or from the overwritten Teacher Hired Date entry on the Staff Snapshot window.
Fields 34 thru 35	Blank
Field 36	Exit Date or date individual is no longer employed.
Fields 37 thru 39	Blank
Field 40	Birth Date
Field 41	Status (A – Active, I – Inactive, D - Delete)
Field 42	Blank
Field 43	Number of Years in District, rounded up to a whole number (from Staff Snapshot Years in District field on the HR Employee Information – Professional Information - Annual Performance Review – Snapshot Codes window)
Fields 44 thru 49	Blank

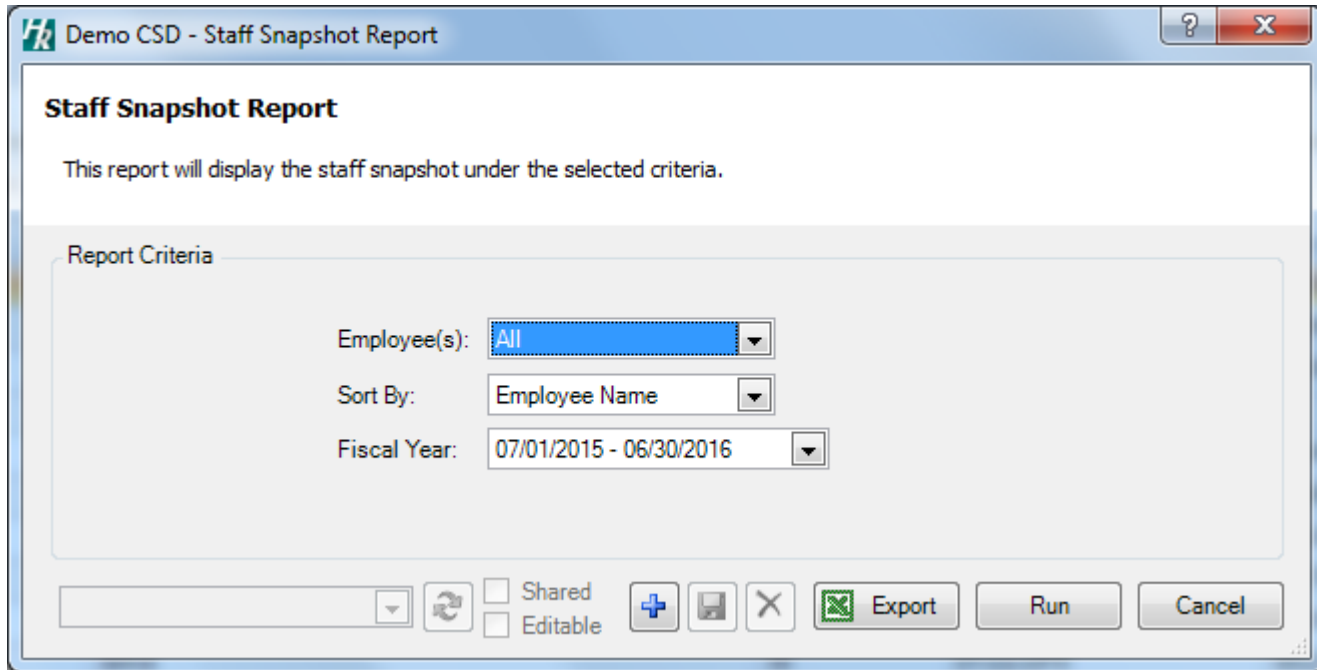
Field 50	Snapshot Fiscal Year End Date
Field 51	Blank
Field 52	The FTE Amount for Contractual and Annualized employees, as entered on the Appointment Earnings window in Employee Payroll Information. For Hourly and Per Diem employees, the Daily Rate is shown as per NY State requirements. For Hourly employees, the Daily Rate is the Standard Hours on the Primary Appointment times the Hourly Rate.
Field 53	Contract Work Days [reported as a whole number for Teachers only (see field 8) from the HR Employee Information – Professional Information – Annual Performance Review – Snapshot Codes window]. Will be reported as 'blank' for all others.
Field 54	Employment separation reason code if no longer employed at the district. (RES – Resigned, RET – Retired, PRT – Performance Related Termination, OTH – Other). NOTE: The Reason is only reported if the Termination Date is within the fiscal year the Staff Snapshot is being run for.
Fields 55 thru 56	Blank
Field 57	Teach ID (nine numeric characters, left-padded with zeros)
Fields 58 thru 59	Blank
Field 60	Employment Basis (Overall FTE from the Appointment window in Employee Payroll Information), reported as a percentage. Ex: 100% is reported as 1.000, 75% is reported as 0.750
Fields 61 thru 64	Blank
Field 65	Employee First Name
Field 66	Employee Last Name
Fields 67 thru 68	Blank
Field 69	Hispanic Ethnicity Indicator - Y if employee is Hispanic/Latino, N if employee is not Hispanic/Latino (as entered on the Employee demographic window in Employee Information). If the Ethnicity field is blank for the employee, the Hispanic flag exports as "blank".
Fields 70 thru 75	Blank
Field 76	Employee Default Work Email Address
Field 77	Employee's Middle Initial or Middle Name
Fields 78 thru 81	Populated with additional race codes if employee is a member of more than one race (as entered on the Professional Information – Annual Performance Review – Additional Codes – Ethnicity tab in Employee Information). (I, A, B, P, W, or <N/A>, where I - American Indian or Alaska Native, A – Asian, B – Black or African American, P – Native Hawaiian/Other Pacific Islander, W – White, or <N/A> - Undefined) If the Ethnicity field is blank for the employee, the Hispanic flag exports as "blank".
Fields 82 thru 101	Blank

Field 102	Total Number of Years of Teaching Experience, rounded up to a whole number. Taken from the Total Years Experience field on the Employee Information - Professional Information – Annual Performance Review – Snapshot Codes tab.
Fields 103 thru 104	Blank
Field 105	'PRINCIPAL' if the employee Position Title is Principal (as defined in Employee Information - Professional Information – Annual Performance Review – Snapshot Codes tab); else blank.
Field 106	Principal Hire Date (Principal Appointment Start Date) in YYYY-MM-DD format (if applicable) Populated from the Staff Snapshot Start Date field on the HR Employee Information – Professional Information – Annual Performance Review – Snapshot Codes window or from the overwritten Principal Hired Date entry on the Staff Snapshot window.
Field 107	Blank
Field 108	Education Level Code (from the Employee Information - Professional Information – Annual Performance Review – Snapshot Codes tab). 0 - No Higher Education 1- Freshman Year Completed 2- Sophomore Year Completed 3 - Associate Degree 4 - Junior Year Completed 5 - Bachelors Degree 6 - Bachelors +30 or more hours 7 - Masters Degree 8 - Master's +30 or more hours 9 - Doctorate
Field 109	Blank
Field 110	Annual Contract Work Months (rounded to a whole number), as indicated in the Months/Year field on the Position Appointment window.
Field 111	Professional Development Indicator that denotes whether the employee received "high quality professional development" during the school year. Reported for Teachers only. (Y – Yes, N – No, or NA – Not Applicable, as entered on the Employee Information - Professional Information – Annual Performance Review – Snapshot Codes tab)
Field 112	Certification Exemption Code, for Charter Schools only, as indicated on the Employee Information - Professional Information – Annual Performance Review – Snapshot Codes tab. Valid entries are Y (Yes) for a teacher who is exempt or N (No) for a teacher who is not exempt.
Field 113	Country Code (4 spaces, leave blank)
Field 114	Mailing Address Country Code (4 spaces, leave blank)


Staff Snapshot Report

Snapshot
Report

On the Staff Snapshot window, click . The Staff Snapshot Report window displays.




Use this window to select the reporting criteria.

1. Select the range of **employees** to include in the report. Choose **All** to report on all employees. Use the drop-down to change the option to **Selection**; then use the search  to select one or a range of employees.
2. Use the drop-down to select the appropriate **sorting** method. Information can be sorted by employee name or employee ID.
3. The **Fiscal Year** defaults to the year associated with the end date selected on the Staff Snapshot window. Use the drop-down to change the **Fiscal Year** reporting period.

4. Click  to generate the report.

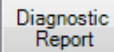
The **Staff Snapshot Report** includes the following information: employee ID number, employee name, teacher ID number, teacher title, teacher hire date, principal title, principal hire date, annual salary, and exit date. The report concludes with the total number of employees.

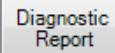
A sample report follows:

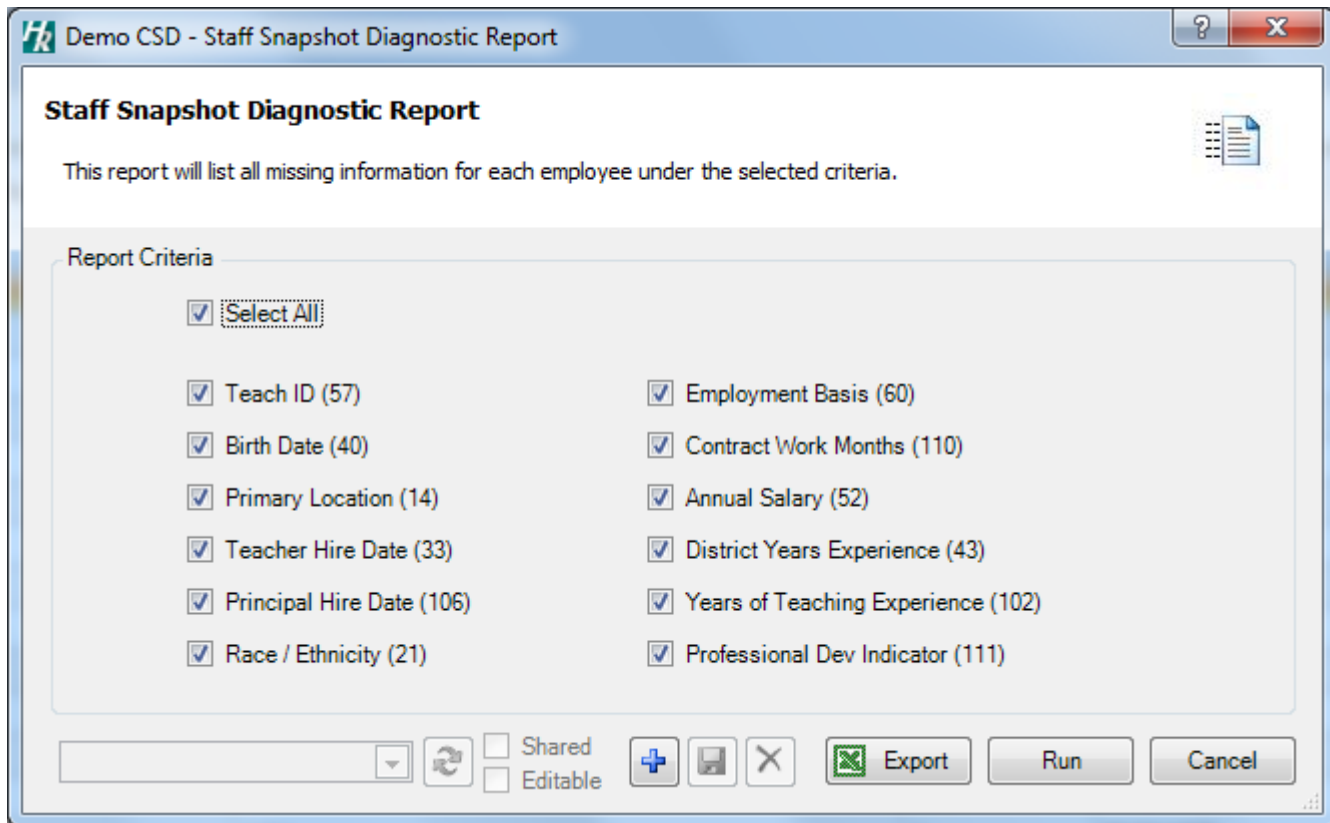
<div> Demo CSD  </div>								
Staff Snapshot Report By Employee Name For Fiscal Year 07/01/2015 - 06/30/2016								
Employee ID	Employee Name	Teacher ID	Teacher Title	Teacher Hire Date	Principal Title	Principal Hire Date	Annual Salary	Exit Date
23	Aaron, Gene A	001523455	Teacher	01/12/2005	Principal	09/03/2006	60,897	
12	Administrator, Alan	001584554	Other				169,569	
8	Administrator, Jill A	002654789			Principal	09/02/1999	140,000	
1283	Amsterdam, Jack A	007789412	Teacher	07/24/2015				
44	Newemployee, Gerald T	001678444	Teacher	03/28/2011			66,985	
1276	Newteacher, Diane	001788989	Teacher	07/14/2014			66,985	
25	Newteacher, Rhonda A	001254524	Teacher	04/14/2006			59,376	
37	Principal, Howard M	002356478			Principal	10/02/2009	95,223	
38	Principal, Jamie E	001236542			Principal	07/01/2009	96,342	
39	Principal, Kenneth H	003521242			Principal	07/01/2009	109,226	
41	Principal, Matthew J	002151222			Principal	10/01/2009	92,422	
1	Smith, John T	001335566	Teacher	08/26/2014			4,615	05/24/2016
1279	Teacher, Diane	001366555	Teacher	07/14/2014			70,112	
2	Teacher, John T	001234567	Teacher	07/01/2000			76,730	09/22/2014
10	Teacher, Samantha	001452145	Teacher	07/01/2001			106,572	
17	Teacher-New, Joanne	001254524	Teacher	10/01/2002			65,465	
Total Number of Employees: 16								

Staff Snapshot Diagnostic Report

In order to be sure that all required fields are completed for a successful Staff Snapshot Export, the following diagnostic report can be generated that will tell you what information is missing for each employee flagged to be included in the Staff Snapshot.

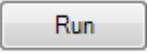


On the Staff Snapshot window, choose the appropriate Fiscal Year End from the drop-down. Then click . The Staff Snapshot Diagnostic Report window displays.




The screenshot shows a window titled "Demo CSD - Staff Snapshot Diagnostic Report". Inside, the title "Staff Snapshot Diagnostic Report" is at the top. Below it, a message states: "This report will list all missing information for each employee under the selected criteria." A "Report Criteria" section contains a list of fields with checkboxes, all of which are checked. The fields are: Teach ID (57), Birth Date (40), Primary Location (14), Teacher Hire Date (33), Principal Hire Date (106), Race / Ethnicity (21), Employment Basis (60), Contract Work Months (110), Annual Salary (52), District Years Experience (43), Years of Teaching Experience (102), and Professional Dev Indicator (111). At the top of this list is a "Select All" checkbox, which is also checked. At the bottom of the window, there is a dropdown menu, a refresh icon, checkboxes for "Shared" and "Editable", a plus icon, a save icon, a close icon, an "Export" button with a green checkmark, a "Run" button, and a "Cancel" button.

Use this window to select the reporting criteria.

Required fields are listed on the window, with the corresponding file field number shown in parentheses. Check the box(es) that precede the name of required information that you wish to report on or check the **Select All** box to flag all boxes. Then click  to generate the report.

The report displays the employee name/number and provides the type of information that is not found in the employee record. Use this report as a guide to complete any missing information for the employees flagged to be included in the Staff Snapshot.

<div> Demo CSD  </div> Staff Snapshot Diagnostic Report		
Employee Name	Employee ID	Missing Information
Aaron, Gene A	23	Race/Ethnicity
Administrator, Alan	12	Race/Ethnicity
Administrator, Jill A	8	Annual Salary Race/Ethnicity
Amsterdam, Jack A	1283	Annual Salary District Years Experience Race/Ethnicity Teach ID Teacher Hire Date Yrs of Teaching Experience
English, Susan	1277	Primary Location Race/Ethnicity
Newemployee, Gerald T	44	Race/Ethnicity
Newteacher, Diane	1276	Race/Ethnicity
Newteacher, Rhonda A	25	Race/Ethnicity
Principal, Howard M	37	Annual Salary Race/Ethnicity
Principal, Jamie E	38	Annual Salary Race/Ethnicity
Principal, John	1285	Annual Salary Contract Work Months Race/Ethnicity
Principal, Kenneth H	39	Annual Salary Race/Ethnicity
Principal, Matthew J	41	Annual Salary Race/Ethnicity
Smith, John T	1	Annual Salary Race/Ethnicity
Teacher, Diane	1279	Race/Ethnicity
Teacher, John T	2	Race/Ethnicity
Teacher, Samantha	10	Race/Ethnicity
Teacher, Test	1284	Annual Salary Race/Ethnicity
Teacher-New, Joanne	17	Race/Ethnicity
Total Employees: 19		

NOTE: If the 'Race/Ethnicity' is listed as missing, this information is optional for the 2015-2016 Staff Snapshot. This message can be ignored for this reporting period.

Staff Snapshot Template Import

The Staff Snapshot Template Import is used to import Staff Snapshot Template information from your Student Information Repository file into nVision. The file must be an Excel® file that has been saved as a .CSV file.

STAFF SNAPSHOT TEMPLATE Import File Specifications

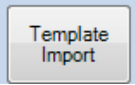
The Staff Snapshot Template file must contain the following information in the order specified below:

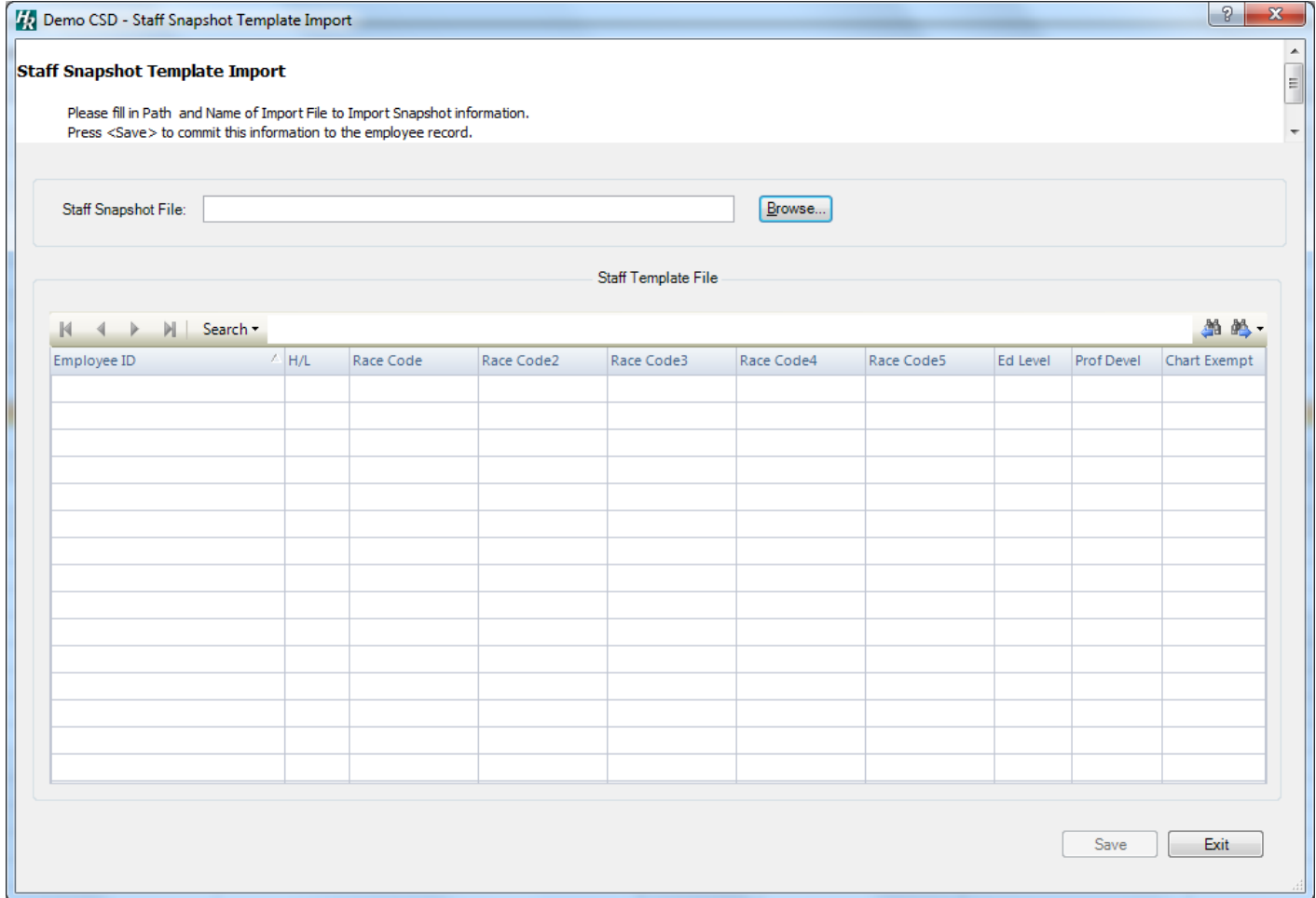
Order	Field	Data Type	Size	Format	Position	Notes
1	Employee ID #	Integer	6	999999	1-6	
2	Hispanic/Latino Indicator	Character	1	X	7	Y = Yes or N = No
3	Race Code	Character	1	X	8	Must be I, A, B, P, or W (I - American Indian or Alaska Native, A – Asian, B – Black or African American, P – Native Hawaiian/Other Pacific Islander, W – White)
4	Race Code 2	Character	1	X	9	Must be I, A, B, P, or W Populated with additional race codes only if employee is a member of more than one race
5	Race Code 3	Character	1	X	10	Must be I, A, B, P, or W Populated with additional race codes only if employee is a member of more than one race
6	Race Code 4	Character	1	X	11	Must be I, A, B, P, or W Populated with additional race codes only if employee is a member of more than one race
7	Race Code 5	Character	1	X	12	Must be I, A, B, P, or W Populated with additional race codes only if employee is a member of more than one race
8	Education Level Code	Integer	1	9	13	Must be 0 through 9, where 0 - No Higher Education 1- Freshman Year Completed 2- Sophomore Year Completed 3 - Associate Degree 4 - Junior Year Completed 5 - Bachelors Degree 6 - Bachelors +30 or more hours 7 - Masters Degree 8 - Master's +30 or more hours 9 - Doctorate
9	Professional Development Indicator	Character	2	XX	14-15	Y = Yes, N = No, or NA = Not Applicable
10	Charter School Exemption Indicator	Character	1	X	16	Y = Yes or No = No
11	Years in District	Decimal		>9.99	17-23	

STAFF SNAPSHOT TEMPLATE Import File Specifications (cont'd)

Order	Field	Data Type	Size	Format	Position	Notes
12	Prior Years	Integer	99	99	24-25	Rounded to a whole number
13	Total Years of Experience	Integer	99	99	26-27	Rounded to a whole number
14	Report to Staff Snapshot flag	Character	1	X	28	Y – Yes, N - No
15	Title	Character	9	XXXXXXXXX	29-37	Teacher, Principal, or blank
16	Work Days	Integer	999	999	38-40	Applicable for Teachers only. For all others, left blank.

Running the Import

On the Staff Snapshot window, click . The Staff Snapshot Template Import window displays.



Staff Snapshot Template Import

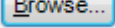
Please fill in Path and Name of Import File to Import Snapshot information.
Press <Save> to commit this information to the employee record.

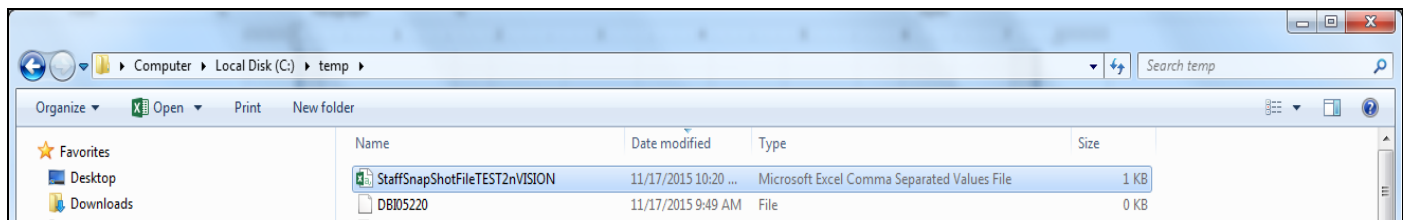
Staff Snapshot File: [Browse...](#)

Staff Template File

Employee ID	H/L	Race Code	Race Code2	Race Code3	Race Code4	Race Code5	Ed Level	Prof Devel	Chart Exempt

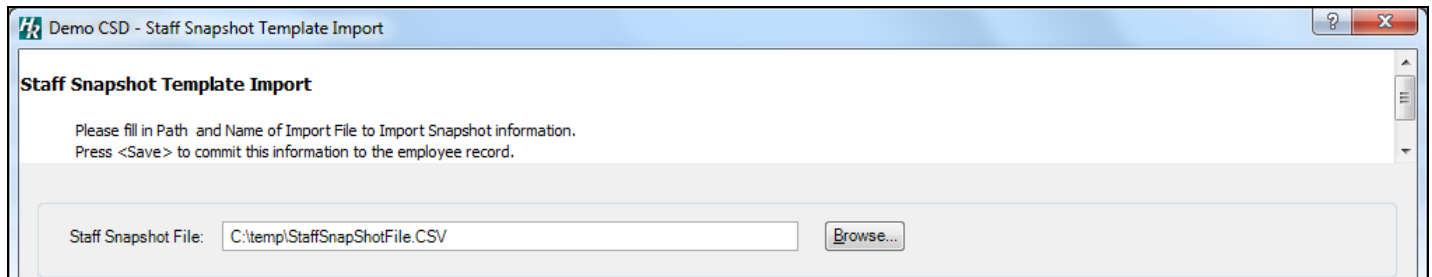
[Save](#) [Exit](#)

To import **Staff Snapshot** file information, click  and highlight the import file that contains the Staff Snapshot information to be imported.

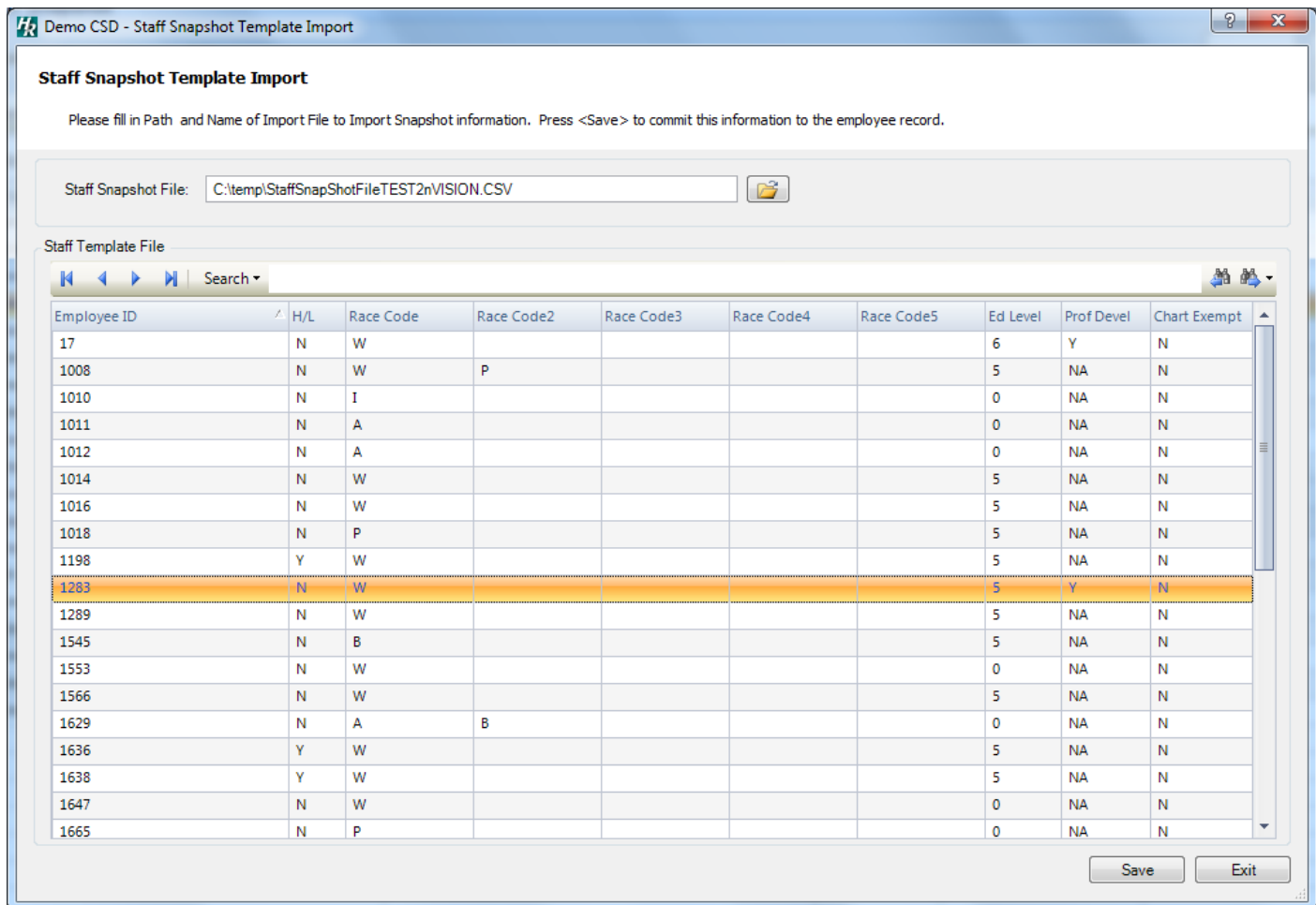


Click the Open button to bring the file name back to the Import window.

Your window should look something like the following:



The imported Staff Snapshot Template File data is shown on the window.



Employee ID	H/L	Race Code	Race Code2	Race Code3	Race Code4	Race Code5	Ed Level	Prof Devel	Chart Exempt
17	N	W					6	Y	N
1008	N	W	P				5	NA	N
1010	N	I					0	NA	N
1011	N	A					0	NA	N
1012	N	A					0	NA	N
1014	N	W					5	NA	N
1016	N	W					5	NA	N
1018	N	P					5	NA	N
1198	Y	W					5	NA	N
1283	N	W					5	Y	N
1289	N	W					5	NA	N
1545	N	B					5	NA	N
1553	N	W					0	NA	N
1566	N	W					5	NA	N
1629	N	A	B				0	NA	N
1636	Y	W					5	NA	N
1638	Y	W					5	NA	N
1647	N	W					0	NA	N
1665	N	P					0	NA	N

Moving the Imported Snapshot Data to the nVision Employee Record

Click  to import the data into nVision.

The imported data is shown on the Professional Information – Annual Performance Review – Snapshot Codes tab in Employee Information.

Demo CSD - Employee - Amsterdam, Jack A

File Edit View Help

+ New Update Save Save and Close X K < > R Notes P Search

Employee

EmployeeID: 1283 SSN: 310-31-3103 Photo

Teacher ID: DOB: 08/04/1959 Age: 56.29

Prefix: Mr. Gender: Male

First Name: Jack Marital Status: Widowed

Middle Name: Anthony Hispanic/Latino: ☐

Last Name: Amsterdam Ethnicity: White

Suffix: Status: ☒ HR Active ☒ PR Active ☐ Pending ☐ Retired

Employee Details

Personal Information Professional Information Appointment Information Task Lists File Attachments Custom Fields nVision Online

Certifications Education Degrees Licenses Professional Development **Annual Performance Review**

Snapshot Codes Additional Codes

Education Level Code: Bachelors degree Yrs In District: 0.32

Professional Development Indicator: Yes Prior Employment Yrs:

ENYP Assignment Code: Total Years Experience: 1

PMF Assignment Code: Contract Work Days: 200

Report To Staff Snapshot: ☒ Charter School Exemption: ☐

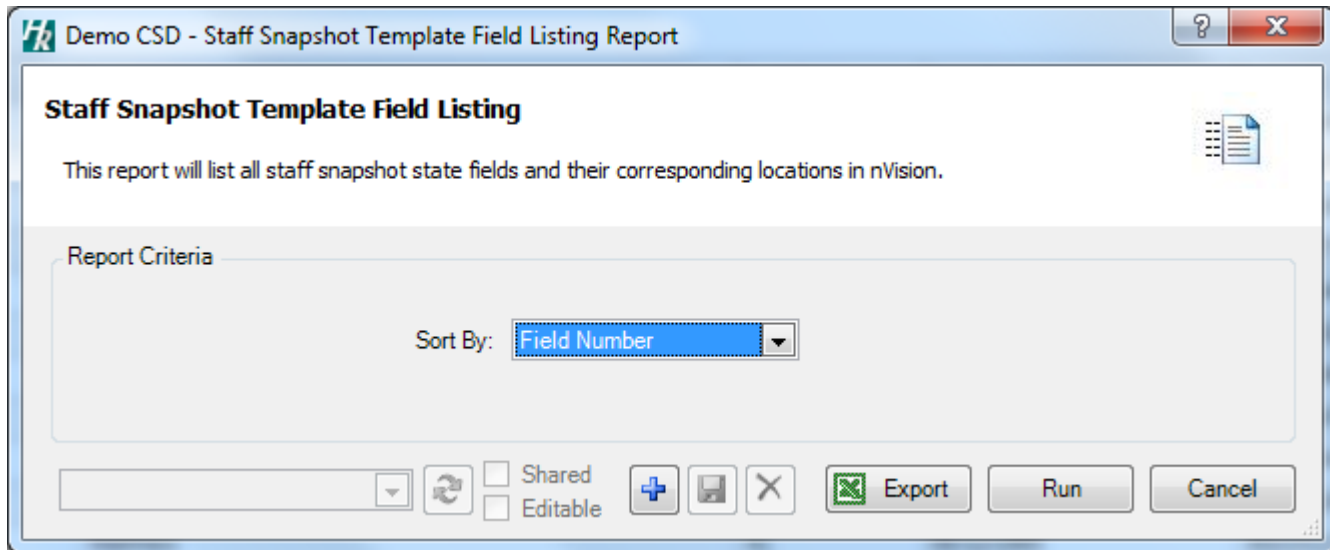
Position Title: Teacher


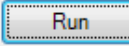
NOTE: After the Staff Snapshot Template is imported, the Staff Snapshot MUST be re-generated to bring in the imported data.

Staff Snapshot Template Required Field Listing

In order to be sure that all required template fields are completed for a successful Staff Snapshot Export, a report can be run that lists all staff snapshot fields and their locations in nVision.

On the Staff Snapshot window, click the  button. The Staff Snapshot Template Field Listing window displays.



Use the drop-down to choose to sort report data by **Field Number** or **Template Name** from the Staff Snapshot export file. Then, click  to open a Microsoft Excel spreadsheet OR  to generate a printable report.

Demo CSD**Staff Snapshot Template Field Listing**

Field Number	Template Name	nVision Name	nVision Location	Field Note
1	District Code	BEDS Code	System Options	NYSED BEDS Codes
2	Staff ID	Employee ID	Employee Information	The local staff ID (must be unique)
8	Position Title (Teacher Title)	Teacher Title	Employee Group	Report to Staff Snapshot Selection
14	Primary Location Code	Building Location	Buildings and Employee Payroll Information	Determine a location if the employee only works in one building
20	Gender Code	Gender	Employee Information	Employee's gender
21	Race or Ethnicity Code	Ethnicity	Employee Information	Employee's race
33	Teacher Hire Date	Appointment Start Date	Employee Payroll Information	The date the staff member was originally hired
36	Exit Date	Termination Date	Employee Information	Populated when the employee is no longer at the district
40	Birth Date	Date of Birth	Employee Information	Employee's date of birth
41	Active/Inactive Indicator	PR Active	Staff Snapshot	Shows if employee is active
43	Years of Educational Experience in District	Years in District	Employee Information - Staff Template Button	Number of years of experience in current district
50	Snapshot Date	Fiscal Year End	Snapshot Utility	Use June 30
52	Annual Salary	Calculated Earnings	Employee Payroll Information	Employee's annual salary
54	Employment Separation Reason Code	SED Separation Code	Employee Information	Use SED Separation Code from leave type on termination reason field
57	Alternate Staff ID	Teacher ID	Employee Information	Source ID from the TEACH System (must be a valid Teacher ID)
60	Employee Basis	FTE	Employee Payroll Information	Employee's Overall FTE %
65	First Name Long	First Name	Employee Information	Employee's first name
66	Last Name Long	Last Name	Employee Information	Employee's last name
69	Hispanic Ethnicity Indicator	Hispanic / Latino	Employee Information - Staff Template Button	Shows whether the employee is Hispanic/Latino or not
76	Email Address	Email	Employee Information	Employee's email (must be valid)
77	Middle Name	Middle Initial	Employee Information	Employee's middle initial
78	Race 2 Code	Staff Race Code	Employee Information - Staff Template Button	If employee is defined as being a member of more than one race
79	Race 3 Code	Staff Race Code	Employee Information - Staff Template Button	If employee is defined as being a member of more than one race
80	Race 4 Code	Staff Race Code	Employee Information - Staff Template Button	If employee is defined as being a member of more than one race
81	Race 5 Code	Staff Race Code	Employee Information - Staff Template Button	If employee is defined as being a member of more than one race
102	Year of Educational Experience	Total Years of Experience	Employee Information - Staff Template Button	Combine all years of educational teaching experience, including other public school districts
105	Second Position Title (Principle Title)	Principal Flag	Employee Group	Report to Staff Snapshot Selection
106	Second Position Hire Date	Appointment Start Date	Employee Payroll Information	If the employee is a principal set this to original hire date
108	Staff Education Level Code	Education Level Code	Employee Information - Annual	Highest degree currently held by employee

Use this spreadsheet/report as a guide to ensure that all the proper information is entered for each individual being reported on the Staff Snapshot. Double check to make sure that all information has been entered in the proper location before continuing with the Staff Snapshot.

Staff Assignment

The Staff Assignment record is a collection of data for PMF and APPR purposes. It allows for an employee who works with or is responsible for ALL grade levels within a building to be reported under a single assignment record with the grade level "ALL" OR for an employee who works with or is responsible for only specific grade levels within the building to be reported under multiple assignment records, each linked to a different grade level. Staff Assignment information is stored in nVision by fiscal year.

In nVision Human Resources, under the Interfaces menu tree, open the State Ed Template menu tree and click the Staff Assignment option. The Staff Assignment window displays.

[illegible]

All of the Staff Assignment options are displayed across the top of the window. The options in this routine are as follows:

The **Generate** option pulls all required Staff Assignment information, based on a selected fiscal year, from the employee record and prepares it for export. **NOTE:** Staff Snapshot records **MUST** be generated **BEFORE** generating Staff Assignment records.


The **Export** option exports the generated Staff Assignment information into an output file.

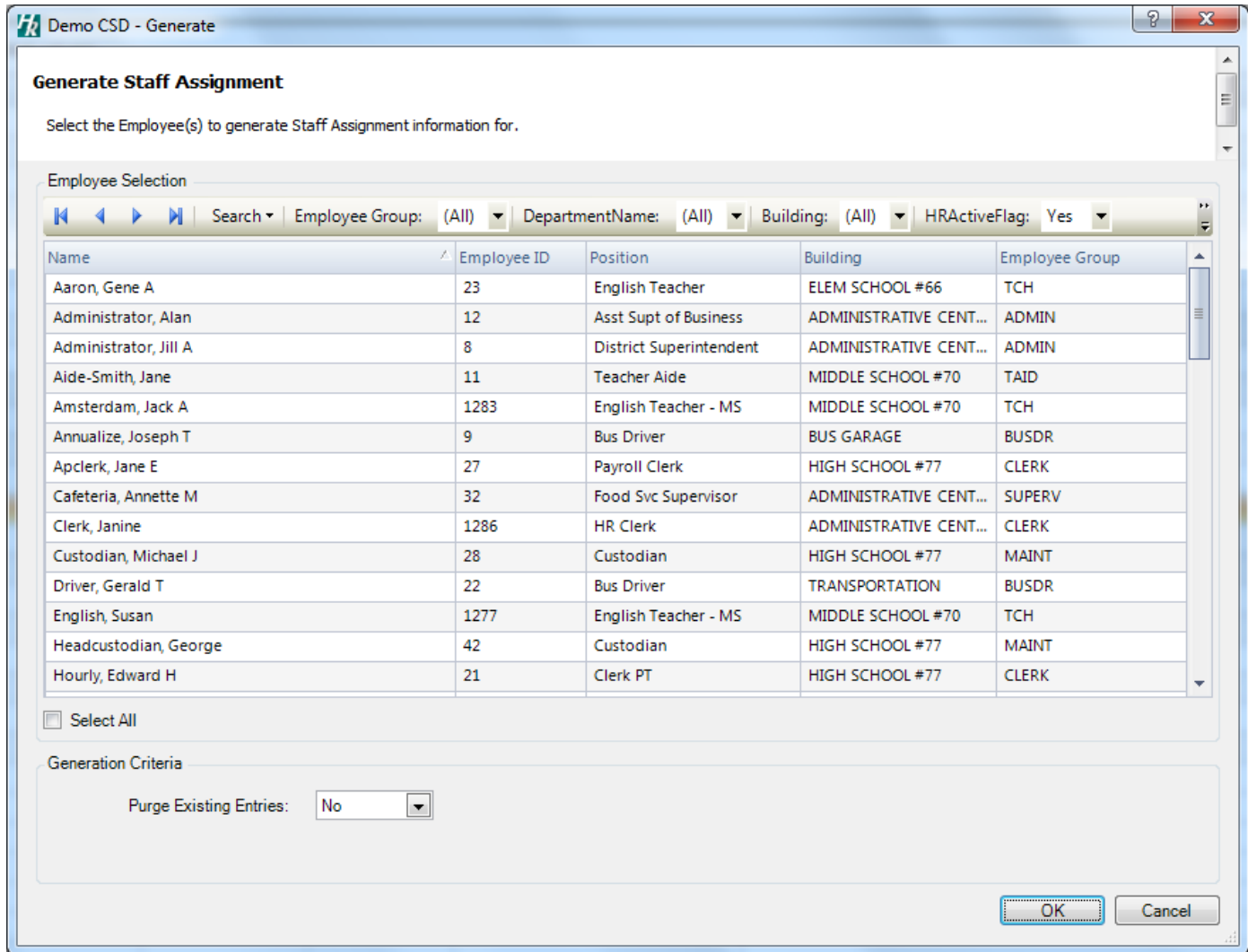
The **Template Import** option is used to import Staff Assignment information from your Student Information Repository file into nVision. The file must be an Excel® file that has been saved as a .CSV file.

The **Listing Report** option can be run after the Staff Assignment information has been generated and updated. This option produces a report of the Staff Assignment information entered for employees.

Generate Staff Assignment

Generate

Choose the appropriate fiscal year end from the drop-down and click . The Generate Staff Assignment window displays.



Generate Staff Assignment

Select the Employee(s) to generate Staff Assignment information for.

Employee Selection

Search Employee Group: (All) DepartmentName: (All) Building: (All) HRActiveFlag: Yes

Name	Employee ID	Position	Building	Employee Group
Aaron, Gene A	23	English Teacher	ELEM SCHOOL #66	TCH
Administrator, Alan	12	Asst Supt of Business	ADMINISTRATIVE CENT...	ADMIN
Administrator, Jill A	8	District Superintendent	ADMINISTRATIVE CENT...	ADMIN
Aide-Smith, Jane	11	Teacher Aide	MIDDLE SCHOOL #70	TAID
Amsterdam, Jack A	1283	English Teacher - MS	MIDDLE SCHOOL #70	TCH
Annualize, Joseph T	9	Bus Driver	BUS GARAGE	BUSDR
Apclerk, Jane E	27	Payroll Clerk	HIGH SCHOOL #77	CLERK
Cafeteria, Annette M	32	Food Svc Supervisor	ADMINISTRATIVE CENT...	SUPERV
Clerk, Janine	1286	HR Clerk	ADMINISTRATIVE CENT...	CLERK
Custodian, Michael J	28	Custodian	HIGH SCHOOL #77	MAINT
Driver, Gerald T	22	Bus Driver	TRANSPORTATION	BUSDR
English, Susan	1277	English Teacher - MS	MIDDLE SCHOOL #70	TCH
Headcustodian, George	42	Custodian	HIGH SCHOOL #77	MAINT
Hourly, Edward H	21	Clerk PT	HIGH SCHOOL #77	CLERK

☐ Select All

Generation Criteria

Purge Existing Entries: No

OK Cancel

Generate Staff Assignment information for selected or all employees. Use the Shift or Ctrl key and choose the consecutive or non-consecutive range of employees or check the Select All box to choose all employees.

If needed, change the radio button to **Yes** to purge all existing entries. Note that if you have already generated for the selected time period and made any changes in the employee staff assignment record, any changes you made will be purged and restored to the original default values. Leave the radio button set to No to leave previously updated entries.

Click **OK** to generate.

NOTE: Only PMF assignment records are generated for fiscal year 2016, since ENYP records are no longer required.

Staff Assignment						
Fiscal Year: 6/30/2016				Generate	Export	Template Import
Search						
Drag a column header here to group by that column.						
Name	Staff ID	Type	Code	Description	Location	Assign Date
Teacher, John T	2	PMF	1421	Resource Teacher	2804	07/01/2015
Teacher, John T	2	PMF	7502	Director Instructional Tech	2804	07/01/2015
Administrator, Jill A	8	PMF	0102	Assistant Superintendent	7471	07/01/2015
Administrator, Alan	12	PMF	0101	Superintendent	7471	07/01/2015
Principal, Howard M	37	PMF	1102	Principal Elementary School	0000	07/01/2015
Principal, Howard M	37	PMF	1104	Principal Middle School	0000	07/01/2015
Principal, Jamie E	38	PMF	1208	Asst Principal Senior High Sch	2804	07/01/2015
Principal, Jamie E	38	PMF	1208	Asst Principal Senior High Sch	2804	07/01/2015
Principal, Jamie E	38	PMF	1208	Asst Principal Senior High Sch	2804	07/01/2015
Principal, Kenneth H	39	PMF	1106	Principal Junior High School	3366	07/01/2015
Principal, Matthew J	41	PMF	1107	Principal K - 12 School	3366	07/01/2015
Newteacher, Diane	1276	PMF	1421	Resource Teacher	3366	07/01/2015

To view an assignment record, double-click on the appropriate employee name.

Demo CSD - Staff Assignment - Principal, Jamie E

File Edit View Help

Update Save Save and Close Search

Staff Assignment Details

Full Name: Principal, Jamie E

Staff ID: 38 District Code: NY123456 School Year: 06/30/2016

Type: PMF Code: 1208

Description: Asst Principal Senior High Sch

Location Code: 2804 Grade Level: ALL Assignment Date: 07/01/2015 Completion Date:

Assignment Title: Assignment Program Code:

The information generated into the Staff Assignment window defaults from multiple locations, within both the employee's record and the setup tables. Note that if the information is NOT in the appropriate areas, it will NOT be included in the record. If needed, you can delete an employee Staff Assignment record, enter required information in the employee record and/or maintenance tables, and then re-generate the Staff Assignment.

The following page lists the fields on this screen and shows where information defaults from in nVision,

Field Name	nVision Location Where Data is Stored																																												
Name Staff (Employee) ID	Employee demographic window in Employee Information																																												
District Code	If your institution is flagged as a School District, this field defaults to "NY + first 6 digits of the BEDS Code" (from Tools – System Options – General folder). If your institution is flagged as a Charter School/Other, this field defaults to "8 + last 7 digits of the Institution Code" (from Tools – System Options – General folder).																																												
School Year	The fiscal year selected at the top of the Staff Assignment window when the information was generated.																																												
Type Code Description	The Assignment Type (PMF), Assignment Code, and Assignment Code Description from the Professional Information – Annual Performance Review tab in Employee Information.																																												
Location Code	The NYSED location code linked to the building in which the employee works. nVision looks at the employee building code, as entered on the Appointment Information – Building Assignment window in Employee Information. The Location Code linked to that building is then pulled from Payroll Building Codes Setup. Note that if an employee works in 2 buildings, the Location Code is displayed as 0000.																																												
Grade Level	<p>Defaults to All for assignment type PMF.</p> <p>For assignment type PMF, if the staff person works with or is responsible for the entire location, "ALL" should be reported. For assignment type PMF, if the staff person works with or is responsible for only some grade levels within the building, one record should be reported for each grade level.</p> <p>Valid Grade Level codes are as follows:</p> <table> <thead> <tr> <th>Code</th><th>Description</th></tr> </thead> <tbody> <tr><td>PS</td><td>PRES</td></tr> <tr><td>PKF</td><td>PREKF</td></tr> <tr><td>PKH</td><td>PREKH</td></tr> <tr><td>KF</td><td>KDGF</td></tr> <tr><td>KH</td><td>KDGH</td></tr> <tr><td>01</td><td>1st</td></tr> <tr><td>02</td><td>2nd</td></tr> <tr><td>03</td><td>3rd</td></tr> <tr><td>04</td><td>4th</td></tr> <tr><td>05</td><td>5th</td></tr> <tr><td>06</td><td>6th</td></tr> <tr><td>07</td><td>7th</td></tr> <tr><td>08</td><td>8th</td></tr> <tr><td>09</td><td>9th</td></tr> <tr><td>10</td><td>10th</td></tr> <tr><td>11</td><td>11th</td></tr> <tr><td>12</td><td>12th</td></tr> <tr><td>13</td><td>K-6</td></tr> <tr><td>14</td><td>7-12</td></tr> <tr><td>GD</td><td>GED</td></tr> <tr><td>ALL</td><td>All Grades</td></tr> </tbody> </table>	Code	Description	PS	PRES	PKF	PREKF	PKH	PREKH	KF	KDGF	KH	KDGH	01	1 st	02	2 nd	03	3 rd	04	4 th	05	5 th	06	6 th	07	7 th	08	8 th	09	9 th	10	10 th	11	11 th	12	12 th	13	K-6	14	7-12	GD	GED	ALL	All Grades
Code	Description																																												
PS	PRES																																												
PKF	PREKF																																												
PKH	PREKH																																												
KF	KDGF																																												
KH	KDGH																																												
01	1 st																																												
02	2 nd																																												
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12	12 th																																												
13	K-6																																												
14	7-12																																												
GD	GED																																												
ALL	All Grades																																												

Field Name	nVision Location Where Data is Stored
Assignment Date	Defaults to the first day of the school year, or first date of the school year that the staff member was assigned to this "location" in this assignment, whichever comes last.
Completion Date	Defaults to the last date in this assignment or building or grade level, whichever comes first. It is only reported if the assignment has ended.

You do not have the ability to add a new record on this window. You may only Update or Delete a record as needed.

On the Staff Assignment window, the **Update** button allows you to update the location code, grade level, assignment date, completion date, assignment title, or assignment program code.

NOTE: If an employee works in 2 buildings, update the Location Code entry to 0000.

Remember to **Save** the record after updating information.

If the employee record should not be included in the Staff Assignment, highlight the record and click **Delete**.

Staff Assignment information is stored in nVision by fiscal year.

Note how three PMF assignment records, with the same PMF code, were manually created on the HR – Employee Information – Professional Information – Annual Performance Review tab for this employee. This employee is responsible for multiple grade levels.

The screenshot shows a web application window titled "Demo CSD - Employee - Principal, Jamie E". The interface includes a menu bar (File, Edit, View, Help) and a toolbar with icons for New, Update, Save, Save and Close, Cancel, Previous, Next, Refresh, Notes, Search, and a printer icon. Below the toolbar, there's a section labeled "Employee" containing various input fields for personal information: EmployeeID (38), Teacher ID (001236542), Prefix (Mrs.), First Name (Jamie), Middle Name (E), Last Name (Principal), Suffix (empty), SSN (446-44-3231), DOB (07/15/1970), Age (45.34), Gender (Female), Marital Status (Married), Hispanic/Latino (checkbox), Ethnicity (White), Status (HR Active, PR Active, Pending, Retired), and a Photo placeholder with "Add Photo" and "Clear Photo" buttons. A section labeled "Employee Details" contains several tabs: Personal Information, Professional Information, Appointment Information, Task Lists, File Attachments, Custom Fields, nVision Online, Certifications, Education, Degrees, Licenses, Professional Development, and Annual Performance Review (highlighted). Under the "Annual Performance Review" tab, there are two sub-tabs: Snapshot Codes and Additional Codes. The "Snapshot Codes" sub-tab is active, showing fields for Education Level Code (Masters+30 or more hours), Professional Development Indicator (<N/A>), ENYP Assignment Code (with a person icon), PMF Assignment Code (1208, with a person icon), Report To Staff Snapshot (checked), Position Title (Principal), Yrs In District (7.38), Prior Employment Yrs (0.00), Total Years Experience (8), Contract Work Days (261), and Charter School Exemption (checkbox).

Employee Details

[Personal Information](#)
[Professional Information](#)
[Appointment Information](#)
[Task Lists](#)
[File Attachments](#)
[Custom Fields](#)
[nVision Online](#)

[Certifications](#)
[Education](#)
[Degrees](#)
[Licenses](#)
[Professional Development](#)
[Annual Performance Review](#)

[Snapshot Codes](#)
[Additional Codes](#)

[Ethnicity](#)
[ENYP](#)
[PMF](#)

Assignment Code	Description
1208	Asst Principal Senior High Sch
1208	Asst Principal Senior High Sch
*	

When the Staff Assignment is generated for this employee, three different records are created, as shown in the screen capture below.

Staff Assignment

Fiscal Year: 6/30/2016

Generate

Export

Template Import

Listing Report

Search

Drag a column header here to group by that column.

Name	Staff ID	Type	Code	Description	Location	Assign Date
Teacher, John T	2	PMF	1421	Resource Teacher	2804	07/01/2015
Teacher, John T	2	PMF	7502	Director Instructional Tech	2804	07/01/2015
Administrator, Jill A	8	PMF	0102	Assistant Superintendent	7471	07/01/2015
Administrator, Alan	12	PMF	0101	Superintendent	7471	07/01/2015
Principal, Howard M	37	PMF	1102	Principal Elementary School	0000	07/01/2015
Principal, Howard M	37	PMF	1104	Principal Middle School	0000	07/01/2015
Principal, Jamie E	38	PMF	1208	Asst Principal Senior High Sch	2804	07/01/2015
Principal, Jamie E	38	PMF	1208	Asst Principal Senior High Sch	2804	07/01/2015
Principal, Jamie E	38	PMF	1208	Asst Principal Senior High Sch	2804	07/01/2015
Principal, Kenneth H	39	PMF	1106	Principal Junior High School	3366	07/01/2015
Principal, Matthew J	41	PMF	1107	Principal K - 12 School	3366	07/01/2015
Newteacher, Diane	1276	PMF	1421	Resource Teacher	3366	07/01/2015

Each individual record should be updated to reflect one of the multiple grade levels for which this employee is responsible, as shown in the screens below.

Demo CSD - Staff Assignment - Principal, Jamie E

File Edit View Help

Update Save Save and Close Search

Staff Assignment Details

Full Name: Principal, Jamie E

Staff ID: 38 District Code: NY123456 School Year: 06/30/2016

Type: PMF Code: 1208

Description: Asst Principal Senior High Sch

Location Code: 2804 Grade Level: 10 Assignment Date: 07/01/2015 Completion Date:

Assignment Title:

Assignment Program Code:

Demo CSD - Staff Assignment - Principal, Jamie E

File Edit View Help

Update Save Save and Close Search

Staff Assignment Details

Full Name: Principal, Jamie E

Staff ID: 38 District Code: NY123456 School Year: 06/30/2016

Type: PMF Code: 1208

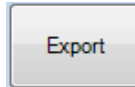
Description: Asst Principal Senior High Sch

Location Code: 2804 Grade Level: 11 Assignment Date: 07/01/2015 Completion Date:

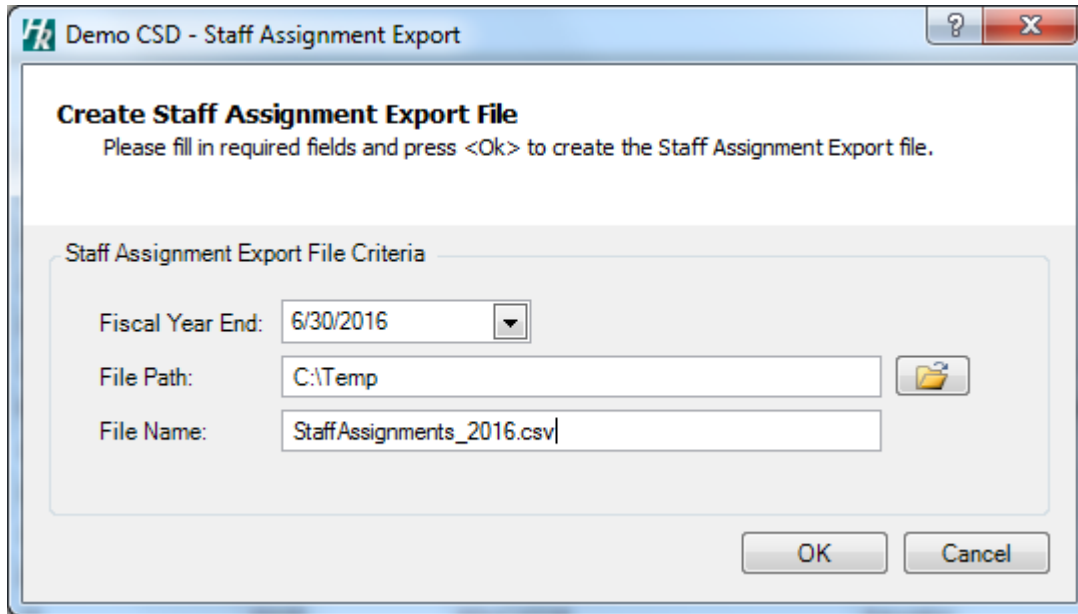
Assignment Title:

Assignment Program Code:


Staff Assignment Export File

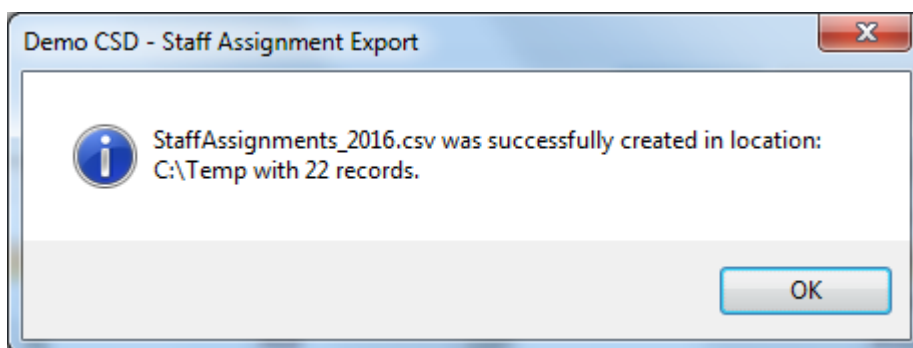


On the Staff Assignment window, click . The Staff Snapshot Export File window displays.

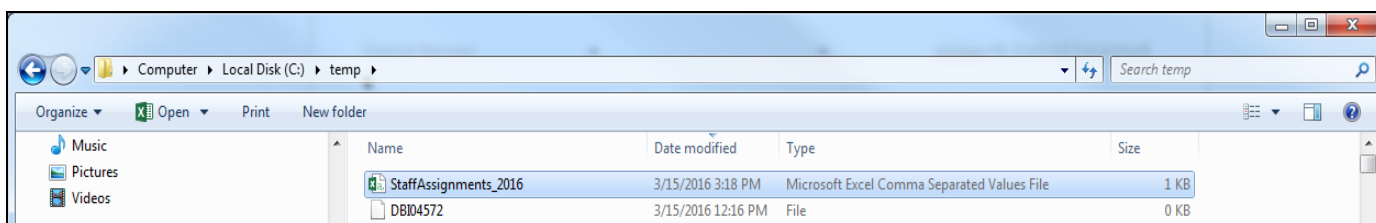
A screenshot of a software window titled "Demo CSD - Staff Assignment Export". The window has a blue header bar with a question mark icon and a close button. The main content area is titled "Create Staff Assignment Export File" and includes the instruction "Please fill in required fields and press <Ok> to create the Staff Assignment Export file." Below this is a section titled "Staff Assignment Export File Criteria" containing three input fields: "Fiscal Year End:" with a dropdown menu showing "6/30/2016", "File Path:" with a text box containing "C:\Temp" and a folder icon button to its right, and "File Name:" with a text box containing "StaffAssignments_2016.csv". At the bottom right of the criteria section are "OK" and "Cancel" buttons.

The Fiscal Year End date defaults to the fiscal year end date selected on the Staff Assignment window. Use the drop-down to change the date, if needed.

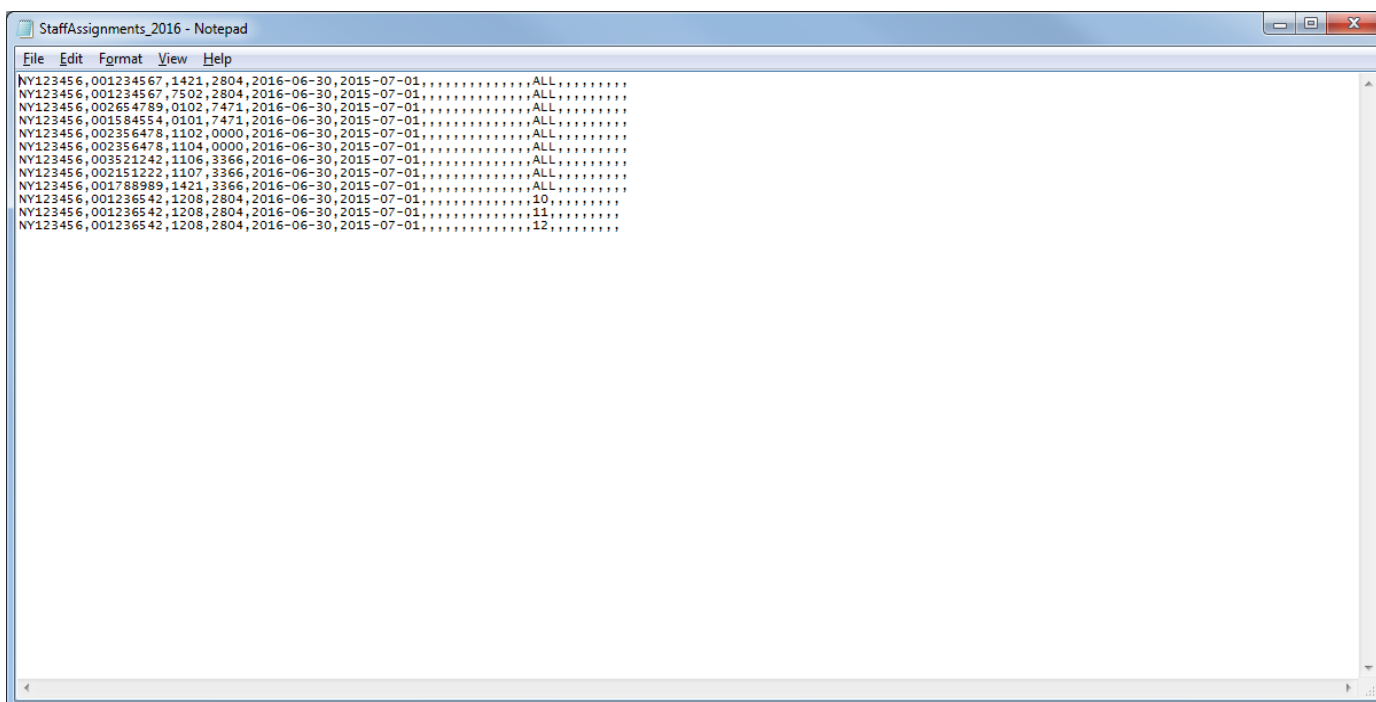
Change the default **path** and **file name** of the export file. This output location is where nVision will place the data file which can be opened and viewed upon completion of the export. Click  to change the path of the file. The file will be a data file with the naming convention "StaffAssignments_FiscalYearEnd(YYYY format)" and the extension ".csv". Click **OK** to process.



Open the path of the output destination. In our example, we used the default output destination c:\temp.



Right click on the name and Open with Notepad to review the contents of the comma separated value (csv) file.



Each record includes the following information (As per NYSED specifications):

Remember that each field in the file is separated by a comma.

Field 1	'NY' + first six digits of the BEDS code if the facility is a School District; '8' + last seven digits of the Institution Code if the facility is designated a Charter School/Other
Field 2	Teach ID (nine numeric characters, left-padded with zeros)
Field 3	PMF Assignment Code
Field 4	NYSED Location Code (from Buildings Codes Setup) that is linked to the Employee's Primary Building. This field will be blank if the NYSED Location Code in Buildings Codes Setup is blank. If the employee works in more than one building, the building code should be 0000.
Field 5	June 30 of the selected reporting school year
Field 6	Assignment Date. This is the first day of the school year, or first date of the school year that the staff member was assigned to this "location" in this assignment, whichever comes last.
Field 7	Assignment Completion Date, if applicable. Otherwise, blank. This is the last date in this assignment or building or grade level.
Fields 8 thru 11	Blank
Field 12	Assignment Program Code (if entered)
Fields 13 thru 19	Blank
Field 20	Assignment Grade Level – If the staff person works with or is responsible for the entire location, "ALL" is reported. If the staff person works with or is responsible for only some grade levels within the building, one record is reported for each grade level.
Fields 21 thru 24	Blank
Field 25	Assignment Title (if entered)
Fields 26 thru 29	Blank

Staff Assignment Template Import

The Staff Assignment Template Import is used to import Staff Assignment information from your Student Information Repository file into FM. The file must be an Excel® file that has been saved as a .CSV file.

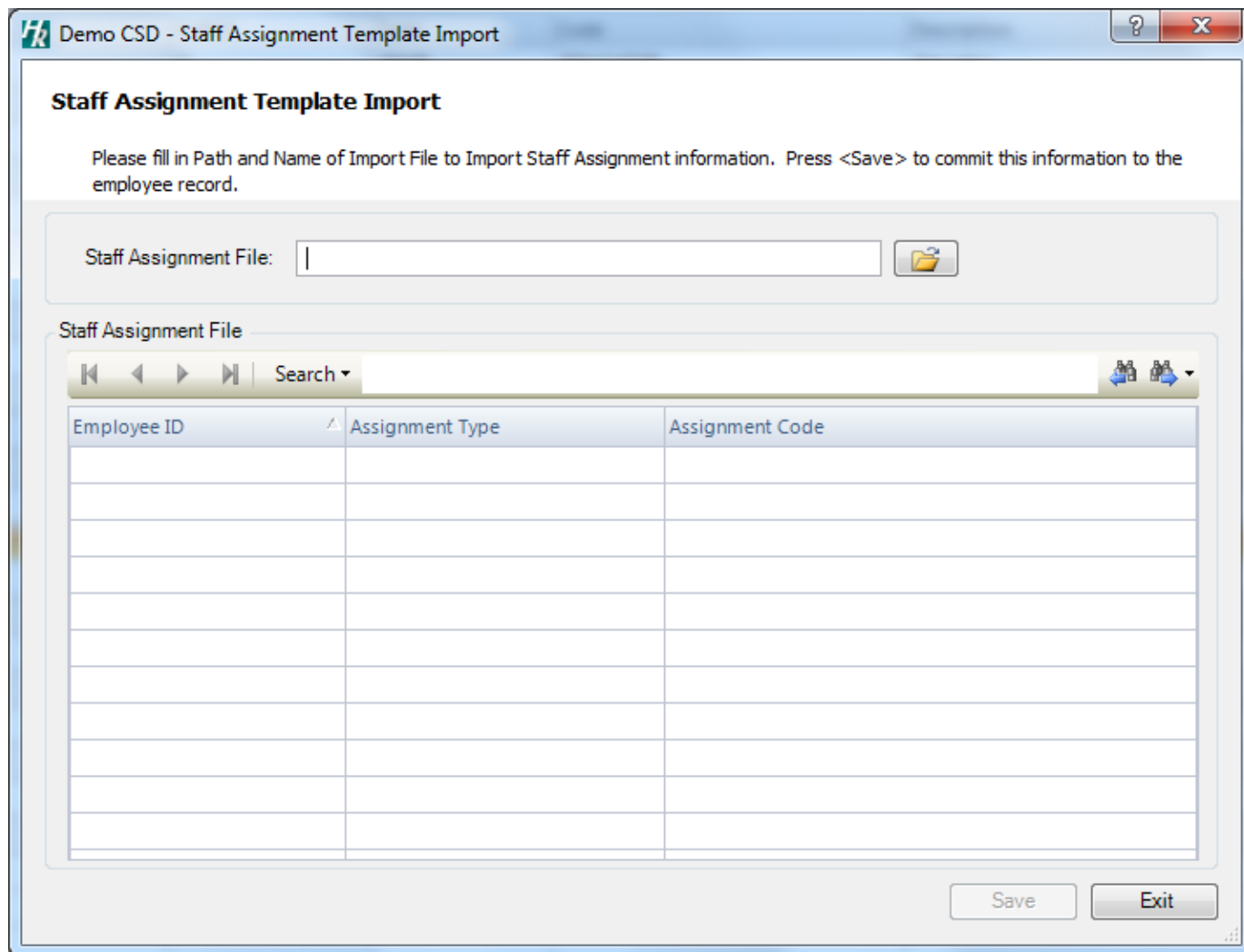
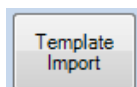
STAFF ASSIGNMENT Import File Specifications

The Staff Assignment file must contain the following information in the order specified below:

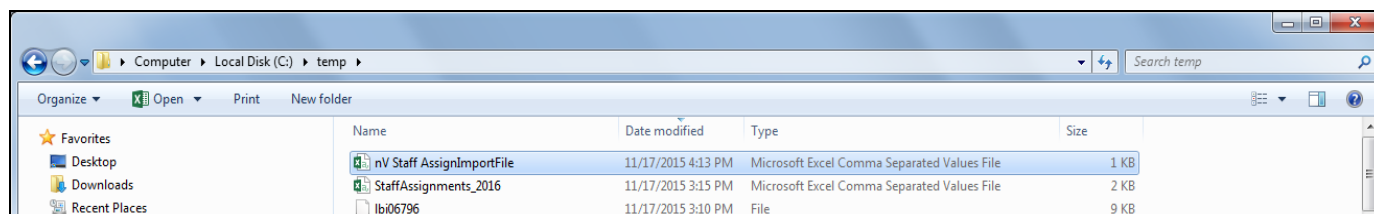
Order	Field	Data Type	Size	Format	Position	Notes
1	Employee ID #	Integer	6	999999	1-6	
2	Assignment Type	Character	4	XXXX	7-10	Must be PMF or ENYP PMF for non-teaching staff members (including building principals) who must be reported for the Personnel Master File (PMF) BEDS collection. ENYP for all non-teaching staff members who need access to the EngageNY Portal.
3	Assignment Code	Character	15	XXXXXX	11-25	Must be one of the following: For PMF Types: NA = Not Applicable <u>OR</u> see a list of valid PMF assignment codes on pages 113 thru 118 in the following document: http://www.p12.nysed.gov/irs/sirs/2014-15/2014-15SIRSMannual10-5-20150303.pdf For ENYP Types: EDUCATIONLEAD = Education Leader EDUCATOR = Educator EDUCATORLEAD = Educator Lead INSTADM1 = Institution Admin I INSTADM2 = Institution Admin II INSTAFF = Institution Staff INSTLEAD = Institution Leader PINSTADM1 = PII Institution Admin I PINSTADM2 = PII Institution Admin II NA = Not Applicable

Running the Import

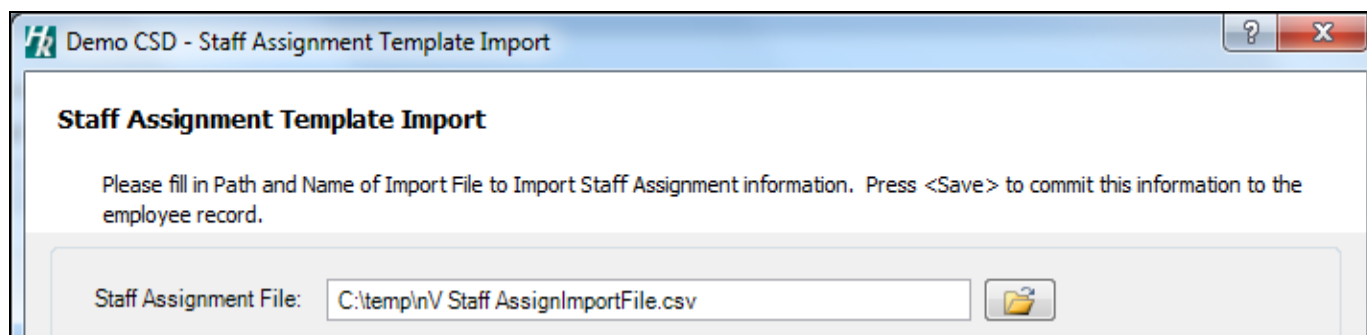
On the Staff Assignment window, click . The Staff Snapshot Template Import window displays.



To import **Staff Assignment** file information, click  and highlight the import file that contains the Staff Assignment information to be imported.




Click the Open button to bring the file name back to the Import window.

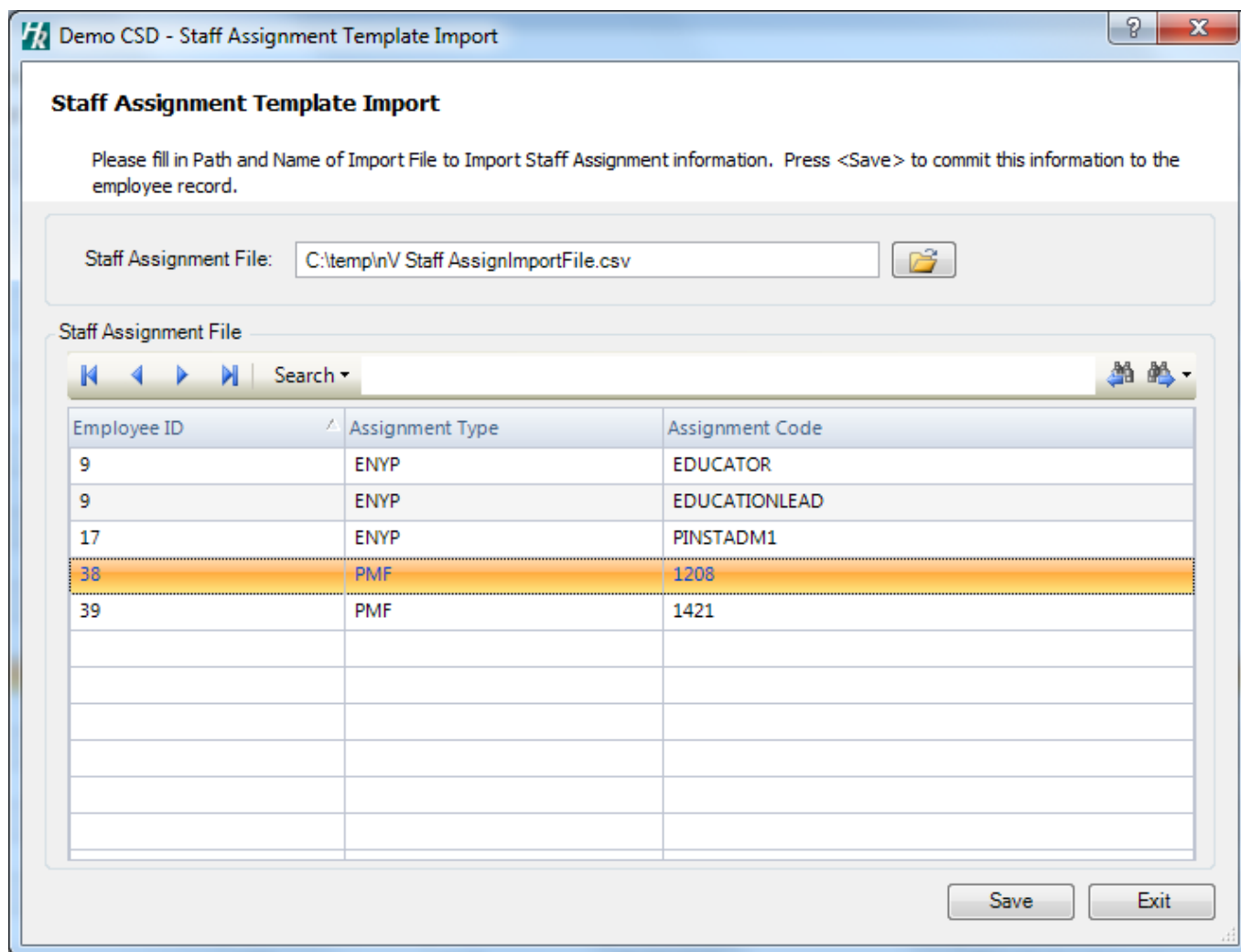


Staff Assignment Template Import

Please fill in Path and Name of Import File to Import Staff Assignment information. Press <Save> to commit this information to the employee record.


Staff Assignment File: 

The imported Staff Assignment Template File data is shown on the window.





Staff Assignment Template Import

Please fill in Path and Name of Import File to Import Staff Assignment information. Press <Save> to commit this information to the employee record.

Staff Assignment File: 

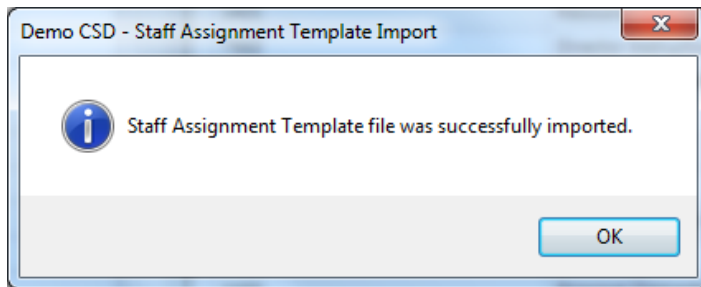
Staff Assignment File

Employee ID	Assignment Type	Assignment Code
9	ENYP	EDUCATOR
9	ENYP	EDUCATIONLEAD
17	ENYP	PINSTADM1
38	PMF	1208
39	PMF	1421

 Search 

Moving the Imported Assignment Data to the nVision Employee Record

Click  to import the data into nVision.



Click OK at the prompt.

The imported data is shown on the Professional Information – Annual Performance Review tab in Employee Information.

Employee

EmployeeID: 38 SSN: 446-44-3231

Teacher ID: 001236542 DOB: 07/15/1970 Age: 45.34

Prefix: Mrs. Gender: Female

First Name: Jamie Marital Status: Married

Middle Name: E Hispanic/Latino: ☐

Last Name: Principal Ethnicity: White

Suffix: Status: ☒ HR Active ☒ PR Active ☐ Pending ☐ Retired

Employee Details

Personal Information Professional Information Appointment Information Task Lists File Attachments Custom Fields nVision Online

Certifications Education Degrees Licenses Professional Development **Annual Performance Review**

Snapshot Codes Additional Codes

Education Level Code: Masters+30 or more hours Yrs In District: 7.38

Professional Development Indicator: <N/A> Prior Employment Yrs: 0.00

ENYP Assignment Code: Total Years Experience: 8

PMF Assignment Code: 1208 Contract Work Days: 261

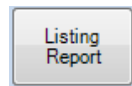
Report To Staff Snapshot: ☒ Charter School Exemption: ☐

Position Title: Principal

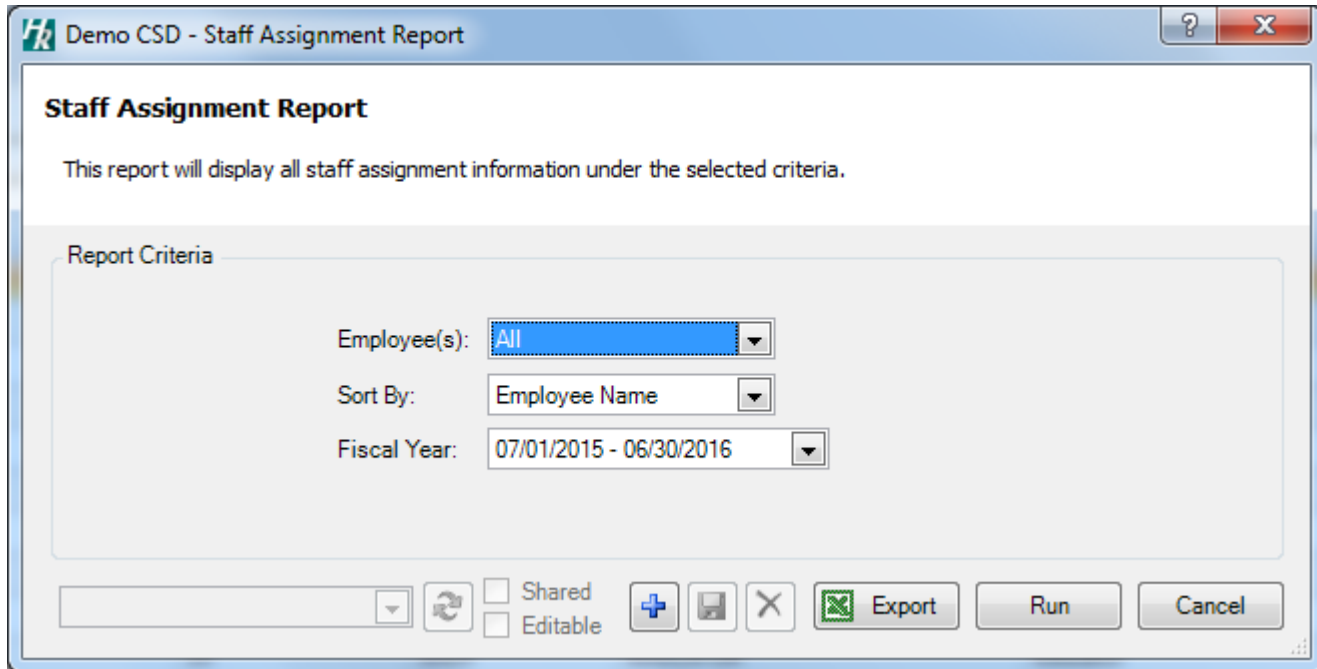
NOTE: After the Staff Assignment Template is imported, the Staff Assignment MUST be re-generated to bring in the imported data.

Staff Assignment Listing Report


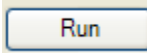
In order to be sure that all required fields are completed for a successful Staff Assignment Export, the following listing can be generated that will tell you what information is currently in nVision that is to be included in the Staff Assignment.



On the Staff Assignment window, click the  button. The Staff Assignment Report window displays.

A screenshot of a software window titled "Demo CSD - Staff Assignment Report". The window has a blue title bar with a question mark icon and a close button. The main content area is white and contains the text "Staff Assignment Report" followed by "This report will display all staff assignment information under the selected criteria." Below this is a section titled "Report Criteria" with three dropdown menus: "Employee(s)" set to "All", "Sort By" set to "Employee Name", and "Fiscal Year" set to "07/01/2015 - 06/30/2016". At the bottom of the window is a toolbar with several icons: a search icon, a refresh icon, checkboxes for "Shared" and "Editable", a plus icon, a save icon, a delete icon, a green "Export" button, a "Run" button, and a "Cancel" button.


Use this window to select the reporting criteria.

1. Select the range of **employees** to include in the report. Choose **All** to report on all employees. Use the drop-down to change the option to **Selection**; then use the search  to select one or a range of employees.
2. Use the drop-down to select the appropriate **sorting** method. Information can be sorted by employee name or employee ID.
3. The **Fiscal Year** defaults to the year associated with the end date selected on the Staff Assignment window. Use the drop-down to change the **Fiscal Year** reporting period.
4. Click  to generate the report.

The Staff Assignment Report provides the following information: employee name, teacher ID, assignment type, assignment code with description, location code, grade level, assignment date, and completion date. The total number of employees reported is provided at the end of the report.

A sample report follows:

Demo CSD



Staff Assignment Report By Employee Name For Fiscal Year 07/01/2015 - 06/30/2016

Employee Name	Staff ID	Assignment Type	Assignment Code	Description	Location Code	Grade Level	Assignment Date	Completion Date
Administrator, Alan	12	PMF	0101	Superintendent	7471	ALL	07/01/2015	
Administrator, Jill A	8	PMF	0102	Assistant Superintendent	7471	ALL	07/01/2015	
Newteacher, Diane	1276	PMF	1421	Resource Teacher	3366	ALL	07/01/2015	
Principal, Howard M	37	PMF	1102	Principal Elementary School	0000	ALL	07/01/2015	
		PMF	1104	Principal Middle School	0000	ALL	07/01/2015	
Principal, Jamie E	38	PMF	1208	Asst Principal Senior High Sch	2804	10	07/01/2015	
		PMF	1208	Asst Principal Senior High Sch	2804	11	07/01/2015	
		PMF	1208	Asst Principal Senior High Sch	2804	12	07/01/2015	
Principal, Kenneth H	39	PMF	1106	Principal Junior High School	3366	ALL	07/01/2015	
Principal, Matthew J	41	PMF	1107	Principal K - 12 School	3366	ALL	07/01/2015	
Teacher, John T	2	PMF	1421	Resource Teacher	2804	ALL	07/01/2015	
		PMF	7502	Director Instructional Tech	2804	ALL	07/01/2015	
Total Number of Employees:		8						

Staff Tenure

The **Staff Tenure** record includes each employee's current tenure status in a Position Title of 'Teacher' and/or 'Principal', effective date of the tenure status, and when their probation ends. Employees with a Position Title of 'Other' are excluded. Staff Tenure information is stored in nVision by fiscal year.

NOTE: Staff Snapshot must be generated **BEFORE** Staff Tenure can be generated.

The Staff Tenure for 2015-2016 should have the specific Tenure Area Types reported only for Teachers and Principals. Tenure information, while accepted by the State, is not required for other Tenured employees. Only Staff Snapshot records that have a Teacher ID flagged as either a Teacher or Principal will be matched to the Tenure file.

In nVision Human Resources, under the Interfaces menu tree, open the State Ed Template menu tree and click the Staff Tenure option. The Staff Tenure window displays.

[illegible]

All of the Staff Tenure options are displayed across the top of the window. The options in this routine are as follows:


The **Generate** option pulls all required Staff Tenure information, based on a selected fiscal year, from the employee record and prepares it for export.

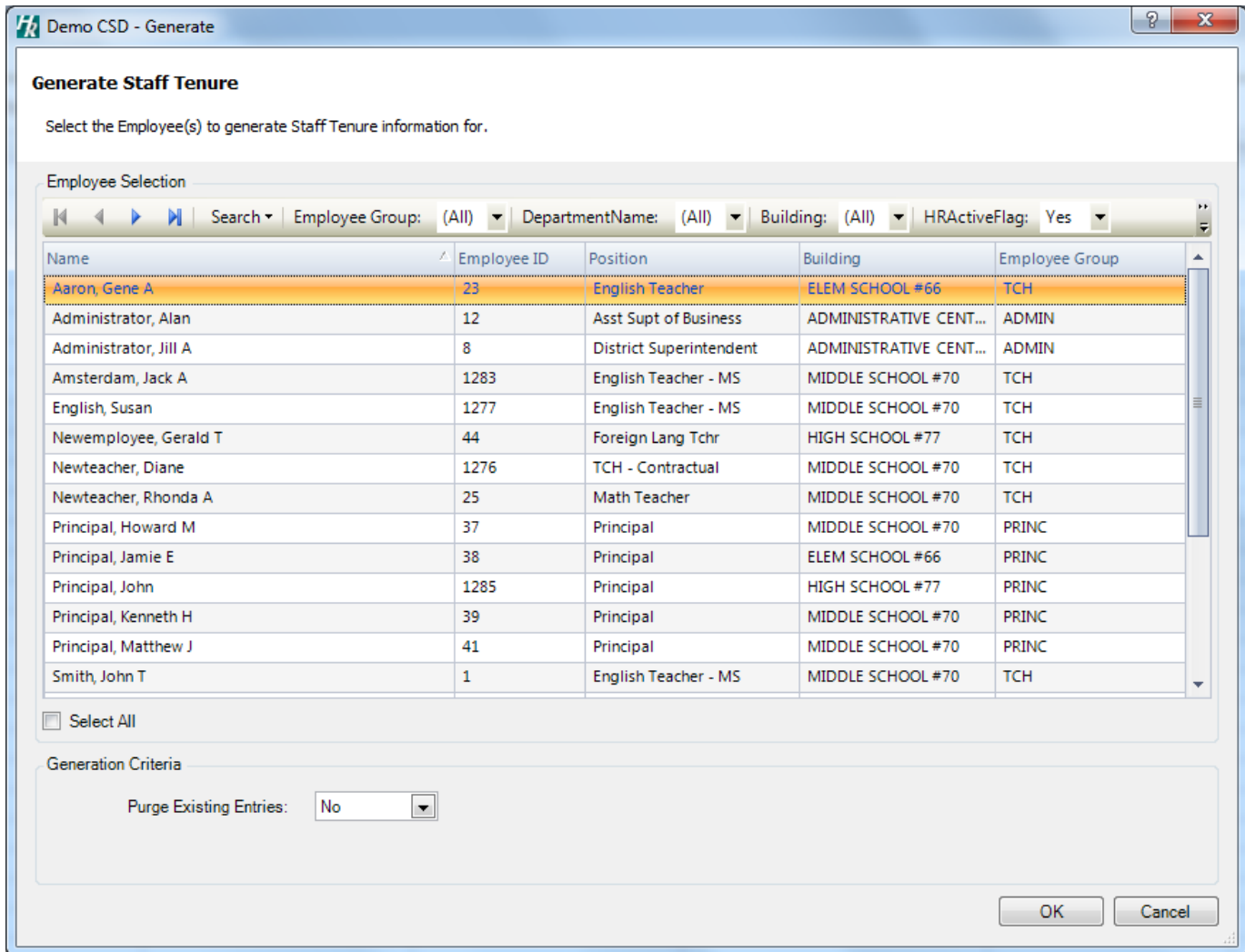
The **Export** option exports the generated Staff Tenure information into an output file.

The **Listing Report** option can be run after the Staff Tenure information has been generated and updated. This option produces a report of the Staff Tenure information entered for employees.

Generate Staff Tenure

Generate

Choose the appropriate fiscal year end from the drop-down and click . The Generate Staff Tenure window displays.



Generate Staff Tenure

Select the Employee(s) to generate Staff Tenure information for.

Employee Selection

Search Employee Group: (All) DepartmentName: (All) Building: (All) HRActiveFlag: Yes

Name	Employee ID	Position	Building	Employee Group
Aaron, Gene A	23	English Teacher	ELEM SCHOOL #66	TCH
Administrator, Alan	12	Asst Supt of Business	ADMINISTRATIVE CENT...	ADMIN
Administrator, Jill A	8	District Superintendent	ADMINISTRATIVE CENT...	ADMIN
Amsterdam, Jack A	1283	English Teacher - MS	MIDDLE SCHOOL #70	TCH
English, Susan	1277	English Teacher - MS	MIDDLE SCHOOL #70	TCH
Newemployee, Gerald T	44	Foreign Lang Tchr	HIGH SCHOOL #77	TCH
Newteacher, Diane	1276	TCH - Contractual	MIDDLE SCHOOL #70	TCH
Newteacher, Rhonda A	25	Math Teacher	MIDDLE SCHOOL #70	TCH
Principal, Howard M	37	Principal	MIDDLE SCHOOL #70	PRINC
Principal, Jamie E	38	Principal	ELEM SCHOOL #66	PRINC
Principal, John	1285	Principal	HIGH SCHOOL #77	PRINC
Principal, Kenneth H	39	Principal	MIDDLE SCHOOL #70	PRINC
Principal, Matthew J	41	Principal	MIDDLE SCHOOL #70	PRINC
Smith, John T	1	English Teacher - MS	MIDDLE SCHOOL #70	TCH

☐ Select All

Generation Criteria

Purge Existing Entries: No

OK Cancel

Generate Staff Tenure information for selected or all employees. Use the Shift or Ctrl key and choose the consecutive or non-consecutive range of employees or check the Select All box to choose all employees.

*******NOTE:** Because of the new Staff Tenure Area Code field required in the Staff Tenure Export, you **MUST** choose **YES** to **Purge Existing Entries**.*****

Click **OK** to generate.

Staff Tenure

Fiscal Year: 6/30/2016

Generate

Export

Listing Report

Search

Drag a column header here to group by that column.

Staff ID	Teach ID	Tenure Area	Tenure Status	Tenure Status Date	Orig Prob End	Prob End Date	Employee Name
1	001335566	ESL	TENGRANT	08/24/2014	08/23/2014	08/23/2014	Smith, John T
2	001234567	SMT	TENGRANT	01/01/2004	12/31/2003	12/31/2003	Teacher, John T
8	002654789	ADT	TENGRANT	09/10/2003	08/31/2002	08/31/2002	Administrator, Jill A
10	001452145	SSS	TENGRANT	08/01/2014	06/30/2013	06/30/2013	Teacher, Samantha
12	001584554	ADT	TENGRANT	09/01/1982	08/31/1982	08/31/1982	Administrator, Alan
17	001254524	ESL	TENGRANT	10/01/2005	09/30/2005	09/30/2005	Teacher-New, Joanne
17	001254524	ETA	TENGRANT	06/01/2012	05/31/2012	05/31/2012	Teacher-New, Joanne
23	001523455	ESL	TENGRANT	01/11/2005	01/10/2005	01/10/2005	Aaron, Gene A
25	001254524	SMT	PROBATION	05/25/2009	04/30/2012	04/30/2012	Newteacher, Rhonda A
37	002356478	ADT	TENGRANT	07/01/2014	06/30/2013	06/30/2013	Principal, Howard M
38	001236542	ADT	TENGRANT	01/06/2014	06/30/2013	06/30/2013	Principal, Jamie E
39	003521242	ADT	TENGRANT	08/25/2014	06/30/2013	06/30/2013	Principal, Kenneth H
41	002151222	ADT	TENGRANT	08/18/2014	06/30/2013	06/30/2013	Principal, Matthew J
44	001678444	SFL	TENGRANT	07/01/2012	06/30/2012	06/30/2012	Newemployee, Gerald T
1277	001677777	ESL	TENGRANT	02/01/2009	01/31/2009	01/31/2009	English, Susan
1283	007789412	ESL	TENGRANT	05/19/2013	05/18/2013	05/18/2013	Amsterdam, Jack A

To view a tenure record, double-click on the appropriate employee name.

Staff Tenure							
File Edit View Help							
<div> <div>Update Save Save and Close</div> <div> <div>Search</div> <div></div> </div> </div>							
Staff Tenure Details							
Full Name: Smith, John T							
Staff ID:	1	Teach ID:	001335566	District Code:	NY123456	School Year:	06/30/2016
Tenure Status Effective Date:	08/24/2014	Tenure Area Code:	ESL	Tenure Status Code:	TENGRANT		
Original Probation End Date:	08/23/2014	Probation End Date:	08/23/2014	Probationary Period Extended:	<input type="radio"/> Yes <input checked="" type="radio"/> No		

The information generated into the Staff Tenure window defaults from the tenure record on the Employee Information - Appointment Information - Tenure folder. Note that if the information is NOT in the appropriate area, it will NOT be included into the record. If needed, you can delete an employee Staff Tenure record, enter required information in the employee record, and then re-generate the Staff Tenure.

The following page lists the fields on this screen and shows where information defaults from in nVision,

Field Name	nVision Location Where Data is Stored
Name Staff (Employee) ID Teach ID	Employee demographic window in Employee Information
District Code	If your institution is flagged as a School District, this field defaults to "NY + first 6 digits of the BEDS Code" (from Tools – System Options – General folder). If your institution is flagged as a Charter School/Other, this field defaults to "8 + last 7 digits of the Institution Code" (from Tools – System Options – General folder).
School Year	The fiscal year selected at the top of the Staff Tenure window when the information was generated.
Tenure Status Effective Date	Tenure Date or Probation Start Date from the Appointment Information Tenure tab in Employee Information.
Tenure Area Code	The Tenure Area Code defaults to the Staff Tenure Code linked to the tenure area in which the employee has or is pursuing tenure, as defined in the Tenure Area Types setup table. If an employee is tenured in more than one area, one record is reported for each tenure area.
Tenure Status Code	Valid codes are as follows: NOTTENELIG – Not Tenure Eligible PROBATION – Probationary PROBEXT – Probation Extended TENGRANT – Tenure Granted TENDEN – Tenure Denied D – Flagged as 'deleted' if the employee was previously reported in error so that the record can be removed from the NYSED files This field defaults to PROBATION if there is a Probation End Date, but no Tenure Date in the employee record. This field defaults to TENGRANT if there is an existing Tenure Date in the employee record <u>or</u> if there is a tenure record with a Tenure Area Type record but no Probation End or Tenure Dates.
Probation End Date	Probation End Date from the Employee Information - Appointment Information - Tenure tab.

You do not have the ability to add a new record on this window. You may only Update or Delete a record as needed.

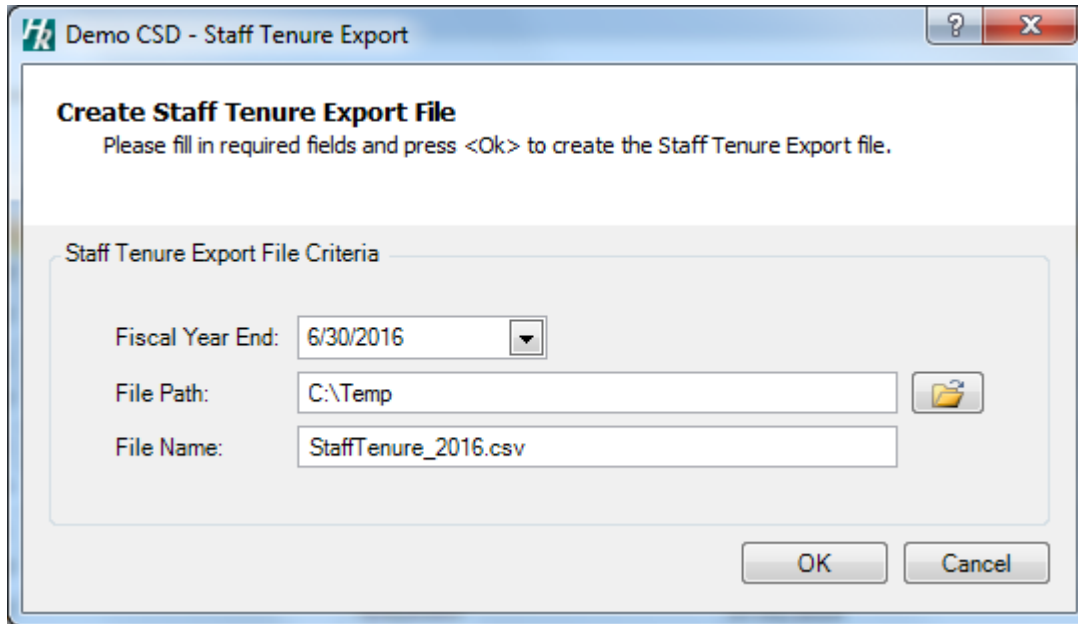
On the Staff Tenure window, the **Update** button allows you to update the tenure status code, original probation end date, probation end date, or probationary period extended flag if needed.

If the employee record should not be included in the Staff Tenure, highlight the record and click **Delete**.

Staff Tenure Export File




On the Staff Tenure window, click . The Staff Tenure Export File window displays.

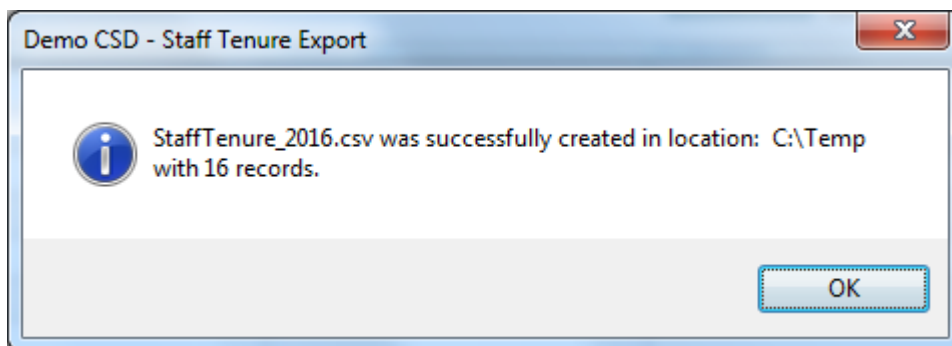


The screenshot shows a window titled "Demo CSD - Staff Tenure Export". Inside, there's a section titled "Create Staff Tenure Export File" with the instruction "Please fill in required fields and press <Ok> to create the Staff Tenure Export file." Below this is a "Staff Tenure Export File Criteria" section containing three fields: "Fiscal Year End:" with a dropdown menu showing "6/30/2016", "File Path:" with a text box containing "C:\Temp" and a folder icon button, and "File Name:" with a text box containing "StaffTenure_2016.csv". At the bottom right are "OK" and "Cancel" buttons.

The Fiscal Year End date defaults to the fiscal year end date selected on the Staff Tenure window. Use the drop-down to change the date, if needed.

Change the default **path** and **file name** of the export file. This output location is where nVision will place the data file which can be opened and viewed upon completion of the export. Click  to change the path of the file. The file will be a data file with the naming convention "StaffTenure_FiscalYearEnd(YYYY format)" and the extension ".csv".

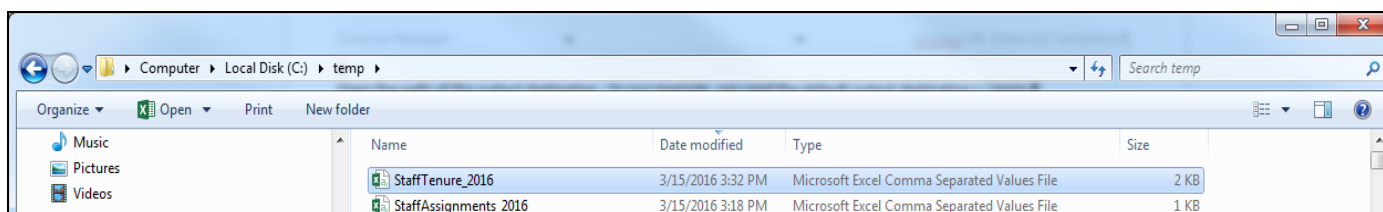
Click **OK** to process.



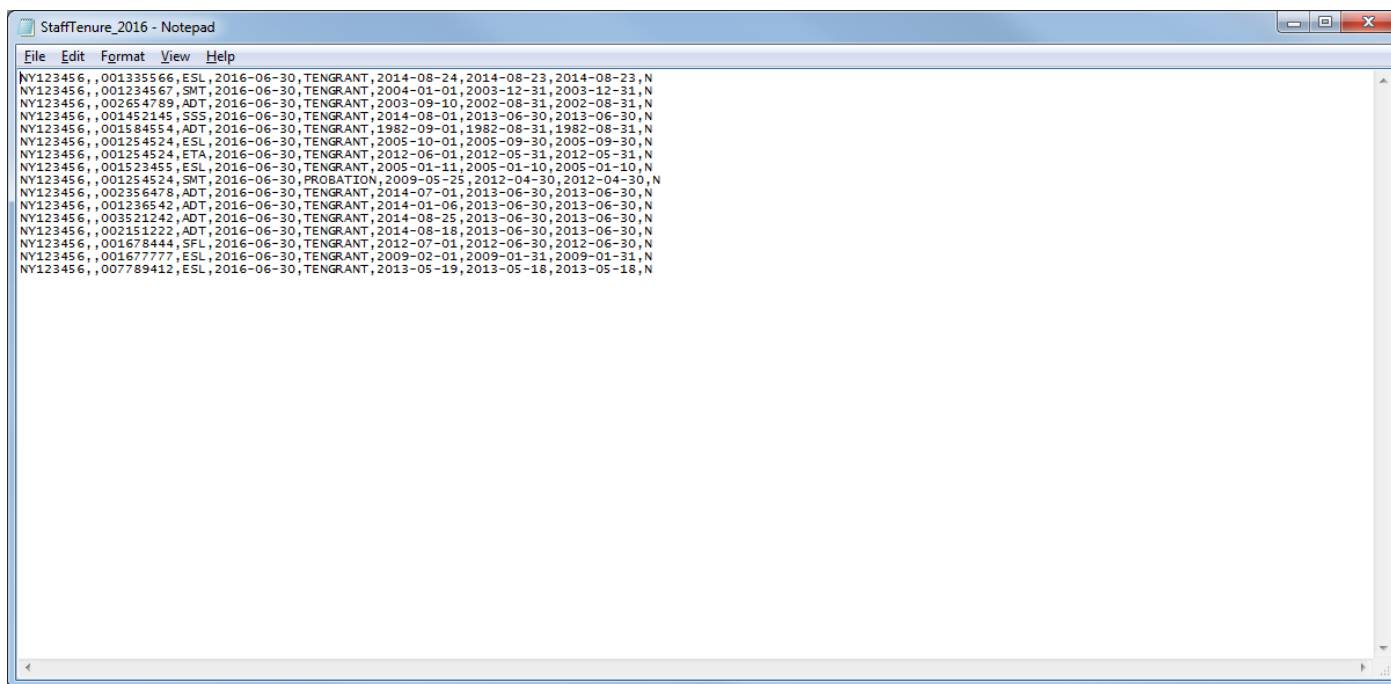
The screenshot shows the same window, but now it displays a success message: "StaffTenure_2016.csv was successfully created in location: C:\Temp with 16 records." There is an information icon (i) to the left of the message. An "OK" button is at the bottom right.

Click **OK** at the prompt.

Open the path of the output destination. In our example, we used the default output destination c:\temp.



Right click on the name and Open with Notepad to review the contents of the comma separated value (csv) file.



The data file contains those employees who have tenure information on the Employee Information – Appointment Information – Tenure tab.

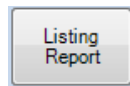
Each record includes the following information (As per NYSED specifications):

Remember that each field in the file is separated by a comma.

Field 1	'NY' + first six digits of the BEDS code if the facility is a School District; '8' + last seven digits of the Institution Code if the facility is designated a Charter School/Other
Field 2	Blank
Field 3	Teach ID (nine numeric characters, left-padded with zeros)
Field 4	The Staff Tenure Code linked to the tenure area in which the employee has or is pursuing tenure, as defined in the Tenure Area Types setup table.
Field 5	June 30 th of the reporting fiscal year end date.
Field 6	<p>Tenure Status Code</p> <p>Valid codes are as follows:</p> <p>NOTTENELIG – Not Tenure Eligible</p> <p>PROBATION – Probationary</p> <p>PROBEXT – Probation Extended</p> <p>TENGRANT – Tenure Granted</p> <p>TENDEN – Tenure Denied</p> <p>D – Flagged as 'deleted' so that the record can be removed from the NYSED files</p> <p>This field defaults to PROBATION if there is a Probation End Date, but no Tenure Date in the employee record.</p> <p>This field defaults to TENGRANT if there is an existing Tenure Date in the employee record <u>or</u> if there is a tenure record with a Tenure Area Type record but no Probation End or Tenure Dates.</p>
Field 7	Tenure Status Effective Date (for those employees who have tenure) or Probation Start Date (for those employees who have not yet achieved tenure) on the Employee Information – Appointment Information - Tenure tab.
Field 8	Original Probation End Date. This is the date that probation in tenure area ends, as defined on the Employee Information – Appointment Information -Tenure tab, or the day prior to the Tenure Date.
Field 9	Probation End Date. If this date is blank and the employee was granted tenure, this field populates with the day before the Tenure Date.
Field 10	Probationary Period Extended Flag (Y or N)

Staff Tenure Listing Report


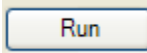
In order to be sure that all required fields are completed for a successful Staff Tenure Export, the following listing can be generated that will tell you what information is currently in nVision that is to be included in the Staff Tenure.



On the Staff Tenure window, click the  button. The Staff Tenure Report window displays.

 A screenshot of a software window titled "Demo CSD - Staff Tenure Report". The window has a standard Windows-style title bar with a question mark icon and a close button (X). Inside the window, the title "Staff Tenure Report" is displayed in bold. Below the title, a message states: "This report will display all staff tenure information under the selected criteria." A section titled "Report Criteria" contains three dropdown menus: "Employee(s)" set to "All", "Sort By" set to "Employee Name", and "Fiscal Year" set to "07/01/2015 - 06/30/2016". At the bottom of the window, there is a toolbar with several icons: a refresh icon, checkboxes for "Shared" and "Editable", a plus icon, a save icon, a delete icon (X), a green "Export" button, a "Run" button, and a "Cancel" button.

Use this window to select the reporting criteria.

1. Select the range of **employees** to include in the report. Choose **All** to report on all employees. Use the drop-down to change the option to **Selection**; then use the search  to select one or a range of employees.
2. Use the drop-down to select the appropriate **sorting** method. Information can be sorted by employee name or employee ID.
3. The **Fiscal Year** defaults to the year associated with the end date selected on the Staff Tenure window. Use the drop-down to change the **Fiscal Year** reporting period.
4. Click  to generate the report.

The Staff Tenure Report provides the following information: employee name, staff ID (employee number), alternate staff ID (teach ID), tenure area code, tenure status code, tenure status effective date, original probationary period end date, probationary period end date, and probationary period extended indicator. The total number of employees reported is provided at the end of the report. A sample report follows:

Demo CSD**Staff Tenure Report By Employee Name For Fiscal Year 07/01/2015 - 06/30/2016**

Employee Name	Staff ID	Alternate Staff ID	Tenure Area Code	Tenure Status Code	Tenure Status Effective Date	Original Probationary Period End Date	Probationary Period End Date	Probation Extended
Aaron, Gene A	23	001523455	ESL	TENGRANT	01/11/2005	01/10/2005	01/10/2005	NO
Administrator, Alan	12	001584554	ADT	TENGRANT	09/01/1982	08/31/1982	08/31/1982	NO
Administrator, Jill A	8	002654789	ADT	TENGRANT	09/10/2003	08/31/2002	08/31/2002	NO
Amsterdam, Jack A	1283	007789412	ESL	TENGRANT	05/19/2013	05/18/2013	05/18/2013	NO
English, Susan	1277	001677777	ESL	TENGRANT	02/01/2009	01/31/2009	01/31/2009	NO
Newemployee, Gerald T	44	001678444	SFL	TENGRANT	07/01/2012	06/30/2012	06/30/2012	NO
Newteacher, Rhonda A	25	001254524	SMT	PROBATION	05/25/2009	04/30/2012	04/30/2012	NO
Principal, Howard M	37	002356478	ADT	TENGRANT	07/01/2014	06/30/2013	06/30/2013	NO
Principal, Jamie E	38	001236542	ADT	TENGRANT	01/06/2014	06/30/2013	06/30/2013	NO
Principal, Kenneth H	39	003521242	ADT	TENGRANT	08/25/2014	06/30/2013	06/30/2013	NO
Principal, Matthew J	41	002151222	ADT	TENGRANT	08/18/2014	06/30/2013	06/30/2013	NO
Smith, John T	1	001335566	ESL	TENGRANT	08/24/2014	08/23/2014	08/23/2014	NO
Teacher, John T	2	001234567	SMT	TENGRANT	01/01/2004	12/31/2003	12/31/2003	NO
Teacher, Samantha	10	001452145	SSS	TENGRANT	08/01/2014	06/30/2013	06/30/2013	NO
Teacher-New, Joanne	17	001254524	ESL	TENGRANT	10/01/2005	09/30/2005	09/30/2005	NO
Teacher-New, Joanne	17	001254524	ETA	TENGRANT	06/01/2012	05/31/2012	05/31/2012	NO

Total Number of Employees: 15

Staff Evaluation Rating

NOTE: The Staff Snapshot file must be sent to the New York State Education Department (NYSED) **before** any evaluation rating information is sent.

The **Staff Evaluation Rating** record stores the overall evaluation rating category (highly effective, effective, developing, or ineffective), the total composite effectiveness score, and subcomponent scores (state, local, and other) for each instructional employee who is part of an APPR plan.

In nVision Human Resources, under the Interfaces menu tree, open the State Ed Template menu tree and click the Staff Evaluation Rating option. The Staff Evaluation Rating window displays.

Name	Staff ID	Teach ID	StateScore	Local Score	Other Score	Overall Composite Score	Overall Composite Criteria

All of the Staff Evaluation Rating options are displayed across the top of the window. The options in this routine are as follows:

The **Generate** option pulls data for those employee groups flagged as instructional employees. Instructional employee ratings can then be entered and saved. Each employee will have four rating records in their Staff Evaluation File – for State, Local, Other, and Total. Ratings information is stored by fiscal year.

The **Export** option exports the Staff Evaluation information into an output file. This ratings file is to be sent to the New York State Education Department (NYSED).

The **Import Ratings** option is used to import employee ratings from an Excel® file that has been saved as a .CSV file into nVision Human Resources.


The **Ratings Report** option can be run after the Staff Evaluation information has been generated and ratings have been entered. This option produces a report of the Staff Evaluation information entered for employees. The Staff Evaluation Ratings Listing can be printed so that all entered information can be reviewed for accuracy.

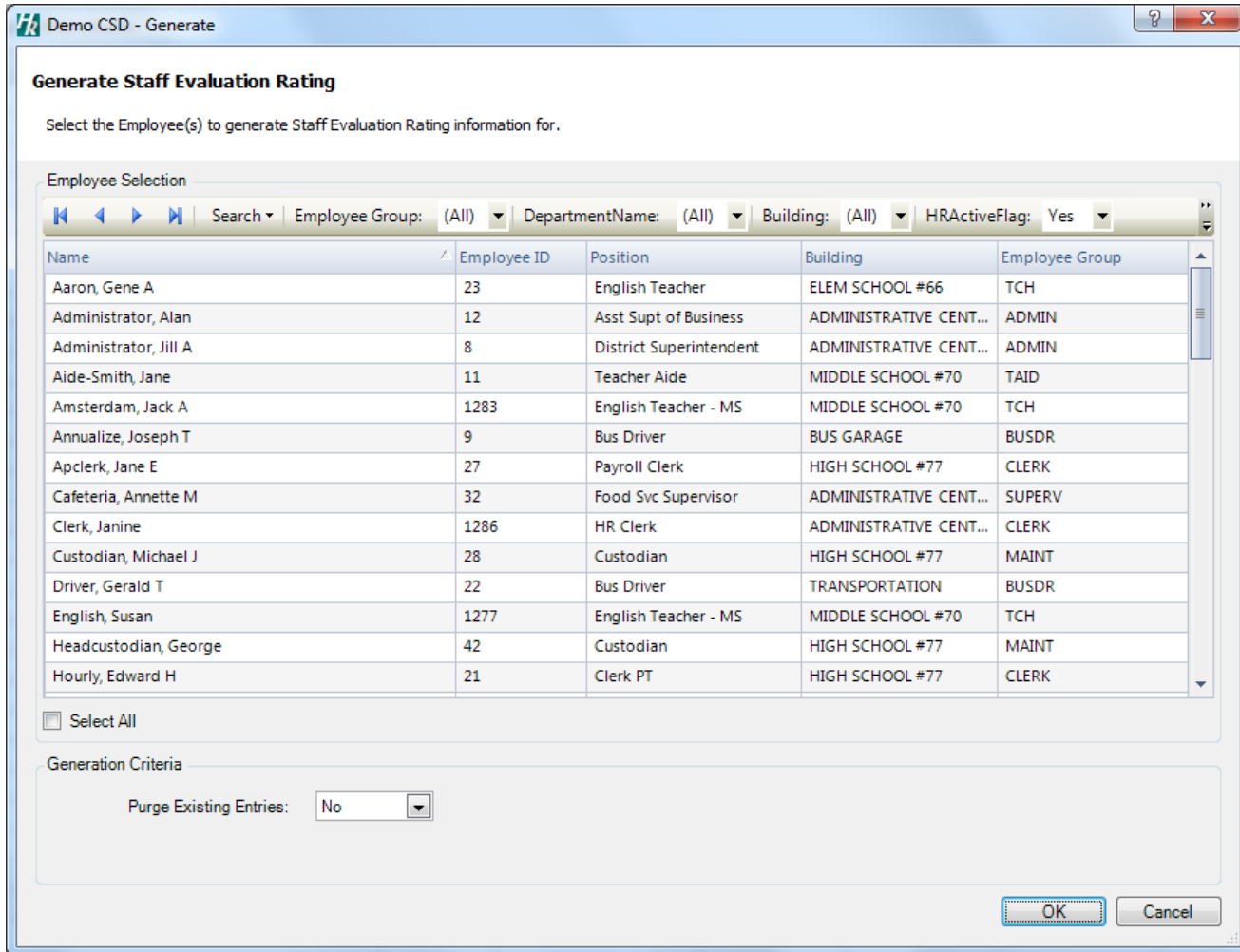
The **Letter** option generates letters that contain the ratings information for each employee.

Generate Staff Evaluation Rating

Staff Evaluation Rating information is stored in nVision by fiscal year. Each employee can only have one set of State, Local, and Other Ratings per fiscal year.

Generate

Choose the appropriate fiscal year end from the drop-down and click . The Generate Staff Evaluation Rating window displays.



Generate Staff Evaluation Rating

Select the Employee(s) to generate Staff Evaluation Rating information for.

Employee Selection

Search Employee Group: (All) DepartmentName: (All) Building: (All) HRAciveFlag: Yes

Name	Employee ID	Position	Building	Employee Group
Aaron, Gene A	23	English Teacher	ELEM SCHOOL #66	TCH
Administrator, Alan	12	Asst Supt of Business	ADMINISTRATIVE CENT...	ADMIN
Administrator, Jill A	8	District Superintendent	ADMINISTRATIVE CENT...	ADMIN
Aide-Smith, Jane	11	Teacher Aide	MIDDLE SCHOOL #70	TAID
Amsterdam, Jack A	1283	English Teacher - MS	MIDDLE SCHOOL #70	TCH
Annualize, Joseph T	9	Bus Driver	BUS GARAGE	BUSDR
Apclerk, Jane E	27	Payroll Clerk	HIGH SCHOOL #77	CLERK
Cafeteria, Annette M	32	Food Svc Supervisor	ADMINISTRATIVE CENT...	SUPERV
Clerk, Janine	1286	HR Clerk	ADMINISTRATIVE CENT...	CLERK
Custodian, Michael J	28	Custodian	HIGH SCHOOL #77	MAINT
Driver, Gerald T	22	Bus Driver	TRANSPORTATION	BUSDR
English, Susan	1277	English Teacher - MS	MIDDLE SCHOOL #70	TCH
Headcustodian, George	42	Custodian	HIGH SCHOOL #77	MAINT
Hourly, Edward H	21	Clerk PT	HIGH SCHOOL #77	CLERK

☐ Select All

Generation Criteria

Purge Existing Entries: No

OK Cancel

The window displays a listing of those employees who have an active appointment within the selected fiscal year and the employee group on the appointment has the **Instructional** flag checked in the Employee Groups Setup area. Ratings information can be manually entered for each individual employee or imported from a .CSV file.

Generate a Staff Evaluation Ratings record for selected or all employees. Use the Shift or Ctrl key and choose the consecutive or non-consecutive range of employees or check the Select All box to choose all employees.

If needed, change the radio button to **Yes** to purge all existing entries. Note that if you have already generated for the selected time period and made any changes in the employee staff evaluation ratings record, any changes you made will be purged and restored to the original default values. Leave the radio button set to No to leave previously updated entries.

Click **OK** to generate.

Staff Evaluation Rating

Fiscal Year: 6/30/2016

Generate Export Import Ratings Ratings Report Letter

Search

Drag a column header here to group by that column.

Name	Staff ID	Teach ID	StateScore	Local Score	Other Score	Overall Composite Score	Overall Composite Criteria
Smith, John T	1	001335566	0	0	0	0	OC01
Teacher, John T	2	001234567	0	0	0	0	OC01
Teacher, Samantha	10	001452145	0	0	0	0	OC01
Teacher-New, Joanne	17	001254524	0	0	0	0	OC01
Aaron, Gene A	23	001523455	0	0	0	0	OC01
Newteacher, Rhonda A	25	001254524	0	0	0	0	OC01
Principal, Howard M	37	002356478	0	0	0	0	OC01
Principal, Jamie E	38	001236542	0	0	0	0	OC01
Principal, Kenneth H	39	003521242	0	0	0	0	OC01
Principal, Matthew J	41	002151222	0	0	0	0	OC01
Newemployee, Gerald T	44	001678444	0	0	0	0	OC01
Newteacher, Diane	1276	001788989	0	0	0	0	OC01
English, Susan	1277	001677777	0	0	0	0	OC01
Teacher, Diane	1279	001366555	0	0	0	0	OC01
Amsterdam, Jack A	1283	007789412	0	0	0	0	OC01
Teacher, Test	1284	002144441	0	0	0	0	OC01
Principal, John	1285	007454745	0	0	0	0	OC01

To enter ratings information, double-click on the appropriate employee name and enter Update mode.

Demo CSD - Staff Evaluation Rating - Teacher, John T

File Edit View Help

Update Save Save and Close Search

Employee

Employee ID: 2 Teach ID: 001234567

Employee Name: Teacher, John T

Evaluation Rating Details

Valid Range:

State Score: 19 0 - 20 State Criteria: STATE20 Criteria Rating: NA

Local Score: 19 0 - 20 Local Criteria: LOCAL20 School Year: 06/30/2016

Other Score: 58 0 - 60 Other Criteria: OTHER - HIGHLY EFFECTIVE Report Date: 06/30/2016

Overall Composite: 96 0 - 100 Overall Composite: OC04 District Code: NY123456

On the Staff Evaluation Ratings window, use the **Update** button to update the state, local, and other scores, as well as the other criteria.

Enter the **State Score**. The entry must be a number between **0** and **20**.

Enter the **Local Score**. The entry must be a number between **0** and **20**.

Enter the **Other Score**. The entry must be a number between **0** and **60**.

Using the drop-down, choose the **Other Criteria**. Valid entries are **Ineffective**, **Developing**, **Effective**, or **Highly Effective**.

If your institution is flagged as a Charter School, the Overall Composite field will be enabled. Simply enter the employee's overall composite score, in compliance with NYSED regulations.

After entering the ratings information for each employee, be sure to **Save** the record.

For School Districts, nVision calculates the Overall Composite score, upon Save of the record, based on the sum of the State, Local, and Other scores. The Overall Composite code automatically defaults based on the following:

For Overall Composite Total Values of:	the Resulting Overall Composite Code is:
0 – 64	OC01
65-74	OC02
75 - 90	OC03
91 - 100	OC04

If an employee record should not be included in the Staff Evaluation Rating, highlight the record and click **Delete**.

Below is a sample of what your completed Staff Evaluation Rating screen may look like:

Staff Evaluation Rating

Fiscal Year: 6/30/2016
Generate
Export
Import Ratings
Ratings Report
Letter

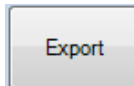
Search

Drag a column header here to group by that column.

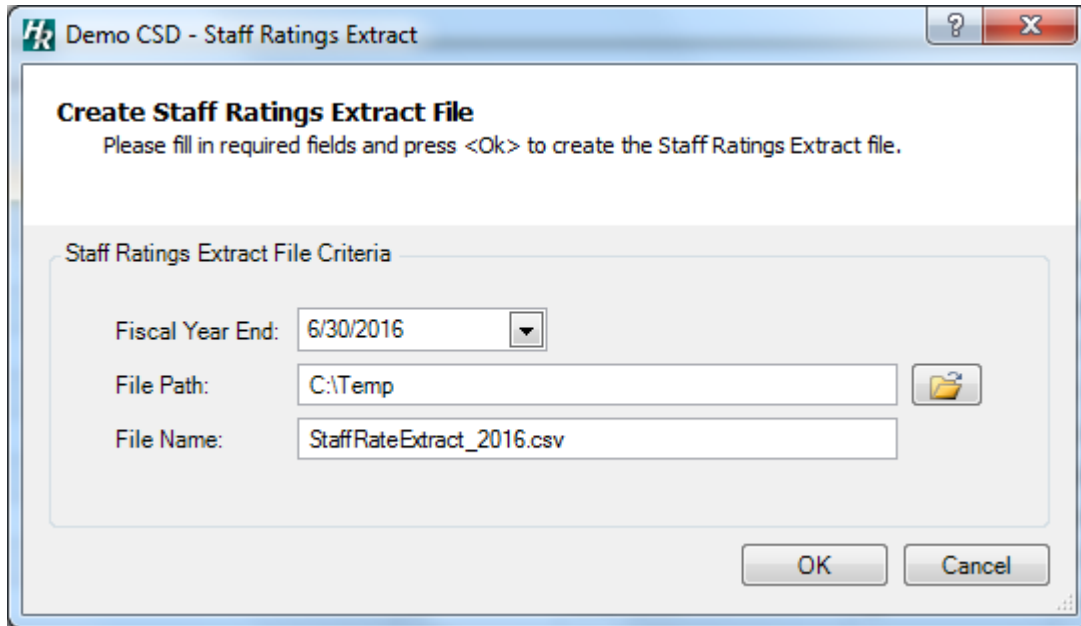
Name	Staff ID	Teach ID	StateScore	Local Score	Other Score	Overall Composite Score	Overall Composite Criteria
Smith, John T	1	001335566	17	17	55	89	OC03
Teacher, John T	2	001234567	19	19	58	96	OC04
Teacher, Samantha	10	001452145	10	10	50	70	OC02
Teacher-New, Joanne	17	001254524	15	16	52	83	OC03
Aaron, Gene A	23	001523455	16	17	50	83	OC03
Newteacher, Rhonda A	25	001254524	10	9	45	64	OC01
Principal, Howard M	37	002356478	14	15	52	81	OC03
Principal, Jamie E	38	001236542	16	18	56	90	OC03
Principal, Kenneth H	39	003521242	18	19	58	95	OC04
Principal, Matthew J	41	002151222	17	17	57	91	OC04
Newemployee, Gerald T	44	001678444	12	11	48	71	OC02
Newteacher, Diane	1276	001788989	13	14	50	77	OC03
English, Susan	1277	001677777	15	15	52	82	OC03
Teacher, Diane	1279	001366555	19	19	58	96	OC04
Amsterdam, Jack A	1283	007789412	14	14	49	77	OC03
Principal, John	1285	007454745	19	20	59	98	OC04


Staff Evaluation Rating Export File

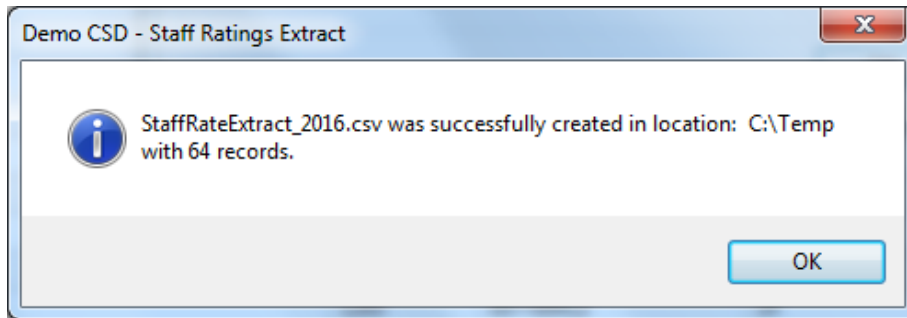
Once the evaluation ratings have been checked for accuracy, the ratings information can be extracted to a file to be sent to New York State.



On the Staff Evaluation Rating window, click . The Create Staff Ratings Extract File window displays.

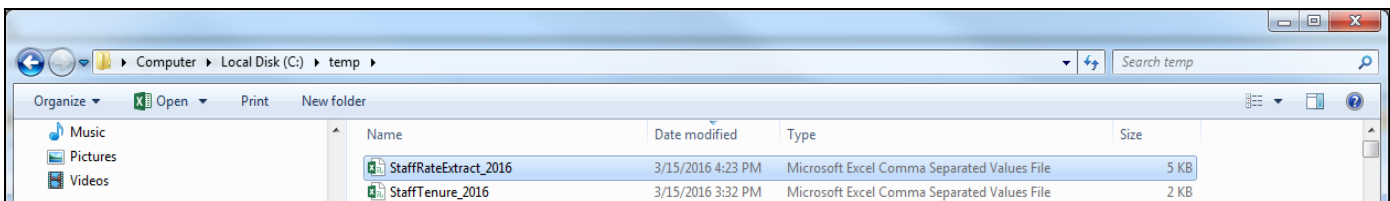
A screenshot of a Windows-style dialog box titled "Demo CSD - Staff Ratings Extract". The dialog has a blue title bar with a question mark icon and a close button (X). The main content area is white and contains the text "Create Staff Ratings Extract File" followed by "Please fill in required fields and press <Ok> to create the Staff Ratings Extract file." Below this is a section titled "Staff Ratings Extract File Criteria" with a light gray background. It contains three fields: "Fiscal Year End:" with a dropdown menu showing "6/30/2016", "File Path:" with a text box containing "C:\Temp" and a folder icon button to its right, and "File Name:" with a text box containing "StaffRateExtract_2016.csv". At the bottom right are "OK" and "Cancel" buttons.

1. The **Fiscal Year End** date defaults to the fiscal year end date selected on the Staff Evaluation Rating window. Use the drop-down to change the date, if needed.
2. Leave the default path or enter the **path** of the extract file. This output location is where nVision will place the data file which can be opened and viewed upon completion of the extract. If needed, use the  button to locate the path of the file.
3. Enter the **name** of the extract file. The file will be a data file with the naming convention "StaffRateExtract_FiscalYearEnd(YYYY format)" and the extension ".csv".
4. Click **OK**. Upon completion of the extract creation, a message window displays indicating the total number of ratings records that were included in the file.

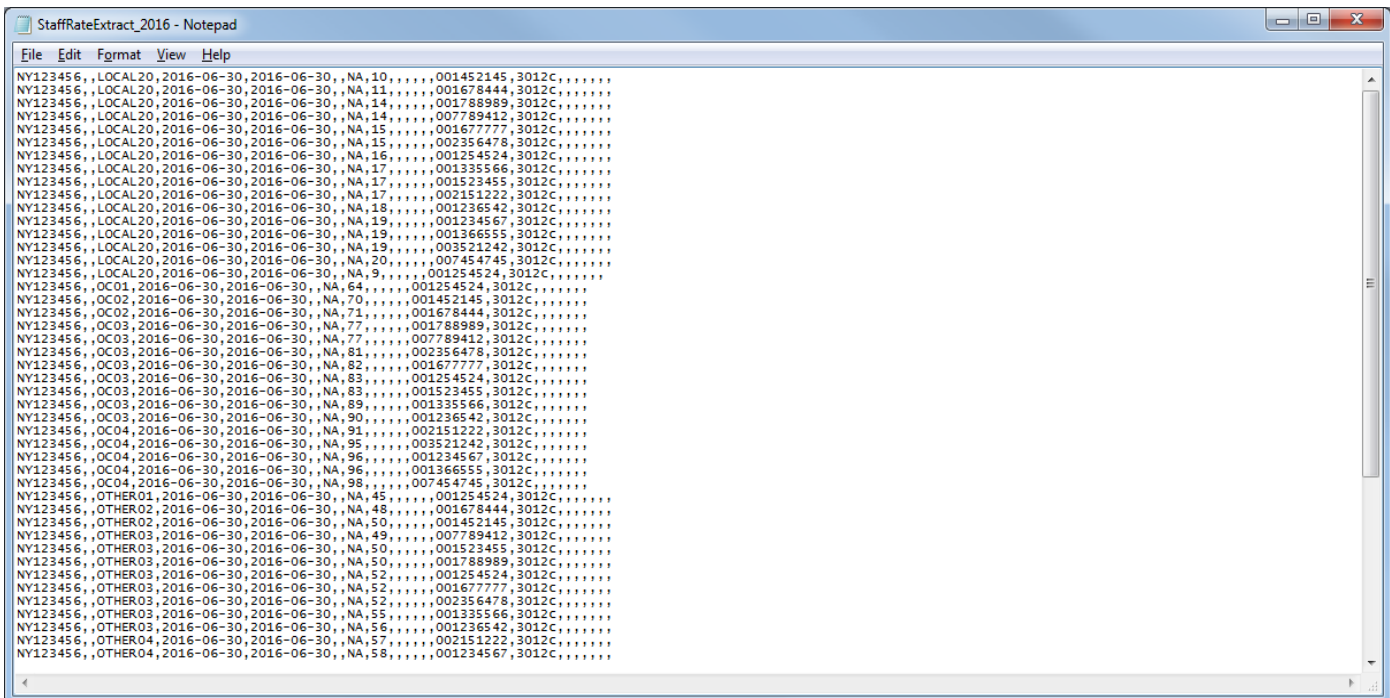


Click **OK** at the prompt.

Open the path of the output destination. In our example, we used the default output destination c:\temp.



Right click on the name and Open with Notepad to review the contents of the comma separated value (csv) file.



The data file contains those records that were flagged to be included in the extract file for each employee.

Each record includes the following information (As per NYSED specifications):

Remember that each field in the file is separated by a comma.

Field 1 'NY' + first six digits of the BEDS code if the facility is a School District; '8' + last seven digits of the Institution Code if the facility is designated a Charter School/Other

Field 2 Blank

Field 3 Rating Code –
 State Score - State20
 Local Score - Local20
 Other Score – valid entries are as follows:
 Other01 if the Other Criteria selected is Ineffective
 Other02 if the Other Criteria selected is Developing
 Other03 if the Other Criteria selected is Effective
 Other04 if the Other Criteria selected is Highly Effective
 Composite Score – valid entries are as follows:
 OC01 for composite scores between 0 and 64
 OC02 for composite scores between 65 and 74
 OC03 for composite scores between 75 and 90
 OC04 for composite scores between 91 and 100

Field 4 Fiscal Year End Date in YYYY-MM-DD format

Field 5 June 30th of the Fiscal Year Reporting End Date in YYYY-MM-DD format

Field 6 Blank

Field 7 Text Field "NA"

Field 8 Ratings Number corresponding to the Rating Code in field 3.
 For State20 – a value from 0-20
 For Local20 – a value from 0-20
 For Other01 - a value from 0-60
 For Other02 - a value from 0-60
 For Other03 - a value from 0-60
 For Other04 - a value from 0-60
 For OC01 - a value from 0-64
 For OC02 - a value from 65-74
 For OC03 - a value from 75-90
 For OC04 - a value from 91-100

Fields 9 – 13 Blank

Field 14 Teach ID (nine numeric characters, left-padded with zeros)

Field 15 Evaluation Group Code, as defined in System Administration – Setup – System Options – HR tab

Fields 16 thru 22 Blank

Staff Evaluation Rating Import

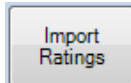
The Import Ratings option is used to import Staff Evaluation Rating information from another repository file into nVision. The file must be an Excel® file that has been saved as a .CSV file in order to be successfully imported via the Import Ratings function.

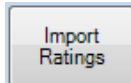
STAFF EVALUATION Import File Specifications

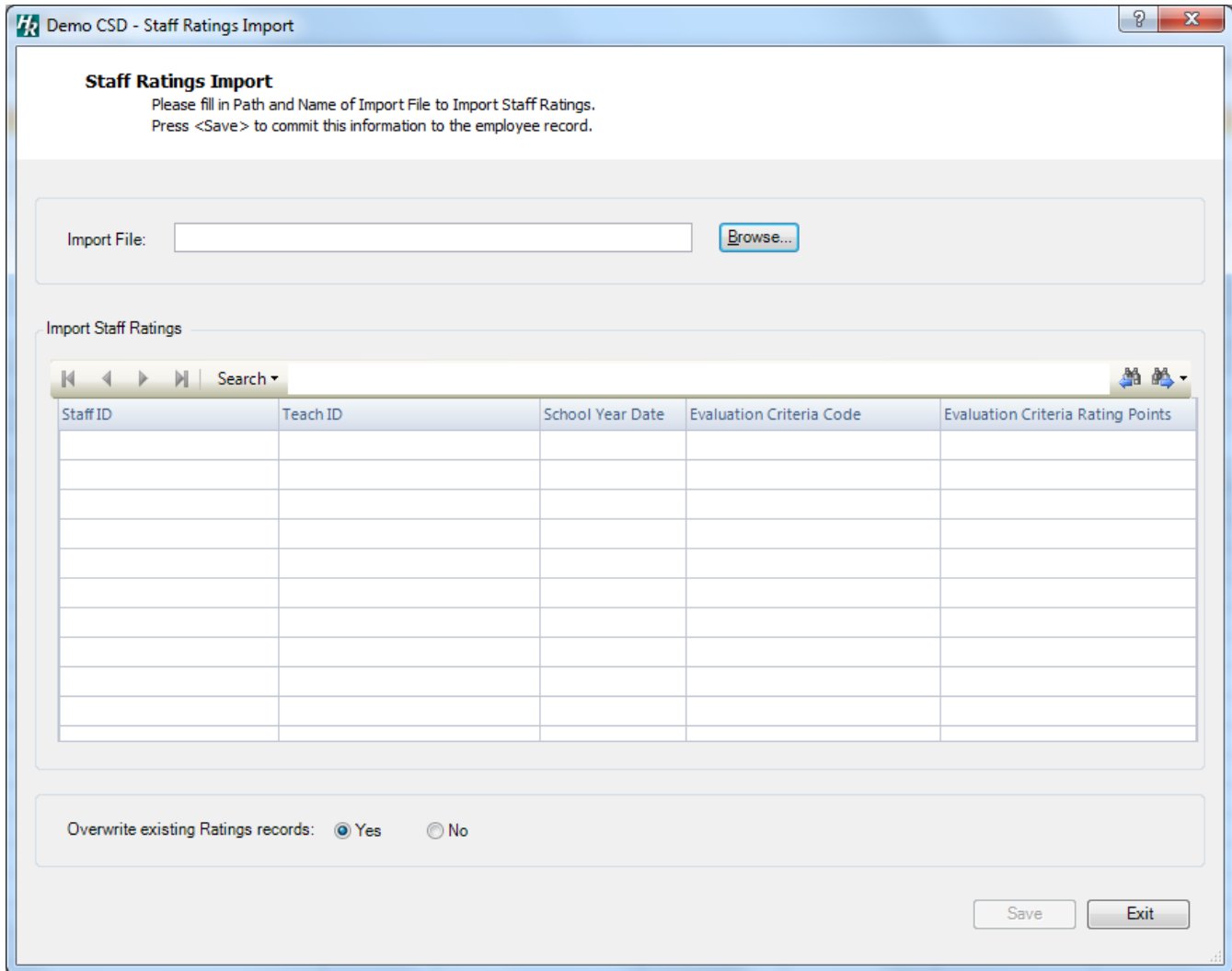
The Staff Evaluation file must contain the following information in the order specified below:

Order	Field	Data Type	Size	Format	Position	Notes
1	Employee ID #	Integer	6	999999	1-6	
2	Employee Teacher ID	Integer	9	999999999	7-15	
3	Fiscal Year End Date	Date	10	YYYY-06-30	16-25	Must be "YYYY-06-30"
4	Evaluation Criteria Code	Alpha-numeric	7		26-32	Valid criteria codes are listed below: State20 Local20 Other01 Other02 Other03 Other04 OC01 OC02 OC03 OC04
5	State, Local, Other, or Composite Rating	Integer	3	>9	33-35	Must be a whole number; no decimals allowed. Valid ratings are listed below: State20 - value between 0 – 20 Local20 - value between 0 – 20 Other01 - value between 0 – 60 Other02 - value between 0 – 60 Other03 - value between 0 – 60 Other04 - value between 0 – 60 OC01 - value between 0 -64 OC02 – value between 65-74 OC03 – value between 75 - 90 OC04 – value between 91 - 100

Importing the File



On the Staff Evaluation Rating window, click . The Staff Ratings Import window displays.

A screenshot of a software window titled "Demo CSD - Staff Ratings Import". The window has a light blue title bar with a question mark icon and a close button. The main content area has a light gray background. At the top, the title "Staff Ratings Import" is followed by instructions: "Please fill in Path and Name of Import File to Import Staff Ratings. Press <Save> to commit this information to the employee record." Below this is a section for "Import File:" with a text input field and a "Browse..." button. Underneath is a section titled "Import Staff Ratings" containing a table with five columns: "Staff ID", "Teach ID", "School Year Date", "Evaluation Criteria Code", and "Evaluation Criteria Rating Points". The table has 10 empty rows. Above the table is a toolbar with navigation icons and a "Search" dropdown. At the bottom of the window, there is a section for "Overwrite existing Ratings records:" with two radio buttons, "Yes" (selected) and "No". At the very bottom right are "Save" and "Exit" buttons.

Staff Ratings Import
Please fill in Path and Name of Import File to Import Staff Ratings.
Press <Save> to commit this information to the employee record.

Import File: [Browse...](#)

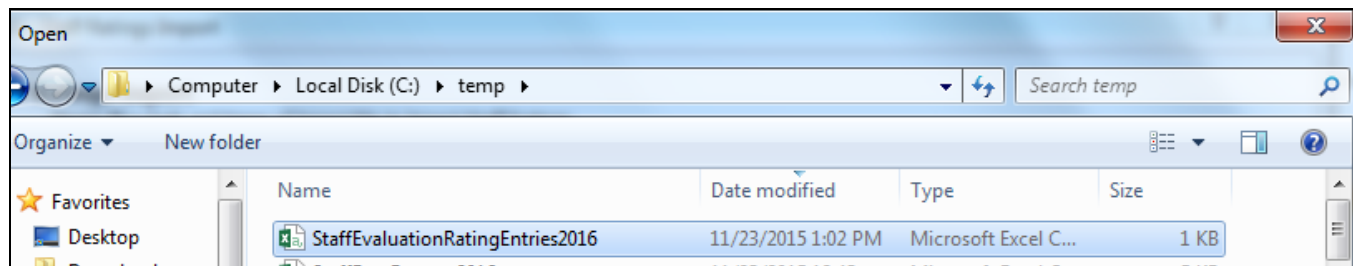
Import Staff Ratings

Staff ID	Teach ID	School Year Date	Evaluation Criteria Code	Evaluation Criteria Rating Points

Overwrite existing Ratings records: ☒ Yes ☐ No

[Save](#) [Exit](#)

To import **Staff Evaluation Rating** file information, click **Browse...** and highlight the import file that contains the Staff Ratings information to be imported.



Click the Open button to bring the file name back to the Import window.

The imported Staff Ratings File data is shown on the window.

Demo CSD - Staff Ratings Import

Staff Ratings Import
Please fill in Path and Name of Import File to Import Staff Ratings.
Press <Save> to commit this information to the employee record.

Import File: **Browse...**

Import Staff Ratings

Staff ID	Teach ID	School Year Date	Evaluation Criteria Code	Evaluation Criteria Rating Points
1	1454784	06/30/2016	STATE20	16
1	1454784	06/30/2016	LOCAL20	17
1	1454784	06/30/2016	OTHER04	55
1	1454784	06/30/2016	OC03	88
2	1584554	06/30/2016	STATE20	17
2	1584554	06/30/2016	LOCAL20	18
2	1584554	06/30/2016	OTHER04	56
2	1584554	06/30/2016	OC04	91
3	2654789	06/30/2016	STATE20	18
3	2654789	06/30/2016	LOCAL20	19
3	2654789	06/30/2016	OTHER04	57

Overwrite existing Ratings records: ☒ Yes ☐ No

Save **Exit**

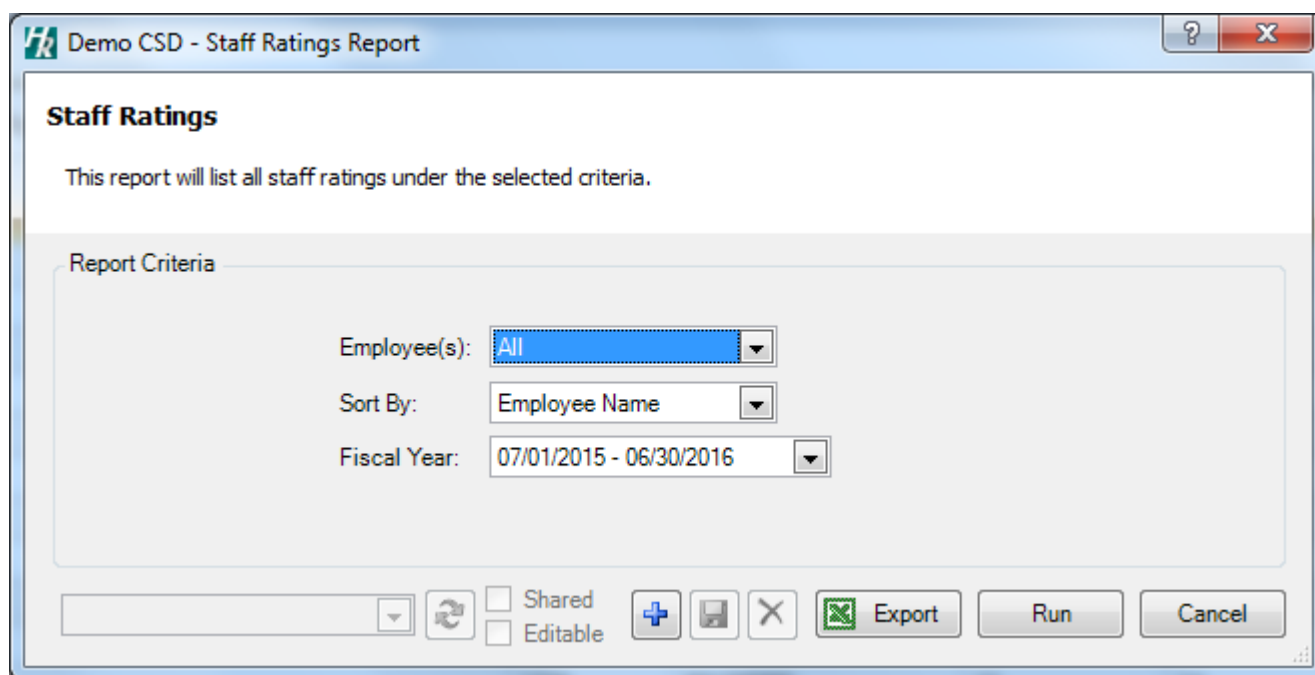
Set the radio button to **Yes** to overwrite any ratings records that currently exist on the Staff Evaluation Ratings window. To leave existing rating records, set the radio button to No.



Then click  to commit the imported information to the nVision Staff Evaluation Ratings window.

Staff Evaluation Ratings Report


In order to be sure that all required fields are completed for a successful Staff Evaluation Rating Export, the following listing can be generated that will tell you what information is currently in nVision that is to be included in the Staff Evaluation Rating.

On the Staff Evaluation Rating window, click . The Staff Ratings Report window displays.



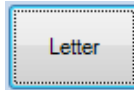
Use the drop-down to choose the employee(s), sorting option (employee ID or employee name), and fiscal year reporting date. Click  to open a Microsoft Excel spreadsheet OR  to generate a printable report.

The Staff Evaluating Rating Report provides the following information for the school reporting year: employee name, staff ID (employee number), teach ID, local(1 to 20) score, state (1 to 20) score, other(0 to 60) score, other criteria code (Developing, Effective, Highly Effective, Ineffective), and composite HEDI score. The total number of employees reported is provided at the end of the report. A sample report follows:

Demo CSD 							
Staff Rating Report By Employee Name For Fiscal Year 07/01/2015 - 06/30/2016							
Employee Name	Staff ID	Teacher ID	Local Score (20)	State Score (20)	Other Score (60)	Other Criteria Code	Composite HEDI Score
Aaron, Gene A	23	001523455	17	16	50	Effective	Effective
Amsterdam, Jack A	1283	007789412	14	14	49	Effective	Effective
English, Susan	1277	001677777	15	15	52	Effective	Effective
Newemployee, Gerald T	44	001678444	11	12	48	Developing	Developing
Newteacher, Diane	1276	001788989	14	13	50	Effective	Effective
Newteacher, Rhonda A	25	001254524	9	10	45	Ineffective	Ineffective
Principal, Howard M	37	002356478	15	14	52	Effective	Effective
Principal, Jamie E	38	001236542	18	16	56	Effective	Effective
Principal, John	1285	007454745	20	19	59	Highly Effective	Highly Effective
Principal, Kenneth H	39	003521242	19	18	58	Highly Effective	Highly Effective
Principal, Matthew J	41	002151222	17	17	57	Highly Effective	Highly Effective
Smith, John T	1	001335566	17	17	55	Effective	Effective
Teacher, Diane	1279	001366555	19	19	58	Highly Effective	Highly Effective
Teacher, John T	2	001234567	19	19	58	Highly Effective	Highly Effective
Teacher, Samantha	10	001452145	10	10	50	Developing	Developing
Teacher-New, Joanne	17	001254524	16	15	52	Effective	Effective
Total Number of Employees: 16							

Staff Evaluation Ratings Letter

The following letter can be generated that will provide the staff evaluation ratings for all or selected employees.



On the Staff Evaluation Rating window, click . The Staff Evaluation Rating Letter Report window displays.

Staff Rating Letter Report

This report will create letters corresponding to employees' evaluation ratings under the selected criteria.

Report Criteria


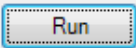
Employee(s): All

Sort By: Employee Name

Fiscal Year: 07/01/2015 - 06/30/2016

☐ Shared
☐ Editable

☒ Export Run Cancel

Use the drop-down to choose the employee(s), sorting option (employee ID or employee name), and fiscal year reporting date. Click  to open a Microsoft Excel spreadsheet OR  to generate a printable report.

The Staff Evaluating Rating Letters Report provides the following information for the school reporting year: employee name, staff ID (employee number), teach ID, HEDI rating (Developing, Effective, Highly Effective, Ineffective), local(1 to 20) score, state (1 to 20) score, other(0 to 60) score, and overall composite score. A sample report follows:

Demo CSD

Employee Name: Teacher, John T

Employee ID: 2

Teacher ID: 001234567

Evaluation Ratings For School Year 07/01/2015 - 06/30/2016

HEDI Rating	Local Rating	State Rating	Other Rating	Overall Composite
Highly Effective	19	19	58	96

Staff Attendance

(New for 2015-2016 Fiscal Year)

There are four options displayed across the top of the window. The options in this routine are as follows:

The **Generate** option pulls all required teacher attendance information, based on a selected fiscal year, from the employee record and prepares it for export. Absence days are counted and grouped for each employee, where the Position Title is defined as 'Teacher', on the HR – Employee Information – Professional Information – Annual Performance Review window - based on the Staff Attendance Code linked to each attendance code defined in your Attendance Code Setup table. Days worked outside the classroom on official school business are not considered absences.

NOTE: Staff Snapshot records MUST be generated BEFORE generating Staff Attendance records.

The **Export** option exports the generated Staff Attendance information into an output file.

The **Attendance Code Mapping Report** option enables you to print a listing of the staff attendance codes linked to each attendance code, with options to include those that are not linked to any attendance code.


The **Listing Report** option can be run after the Staff Attendance information has been generated and updated. This option produces a report of the Staff Attendance information for teachers.

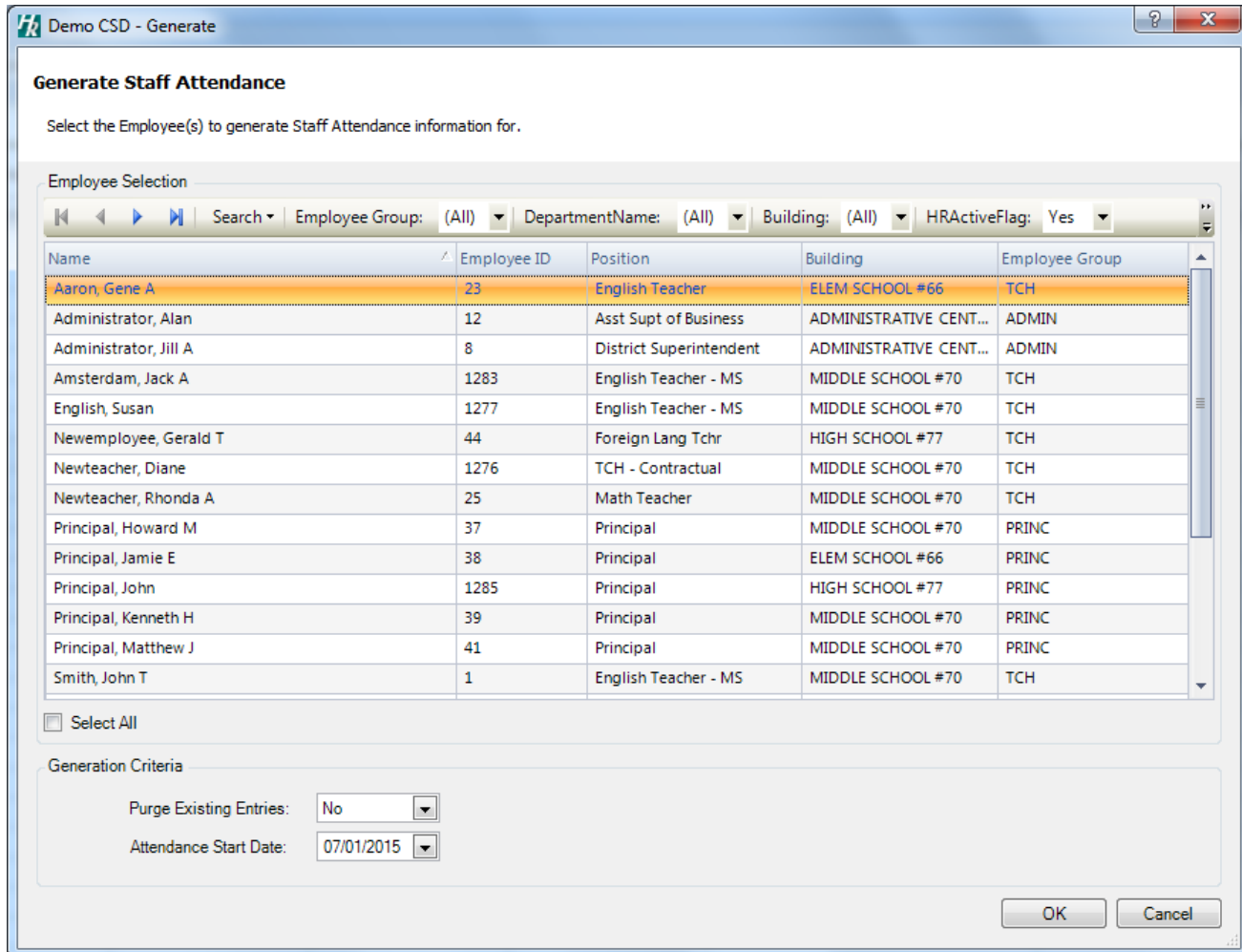
In nVision Human Resources, under the Interfaces menu tree, open the State Ed Template menu tree and click the Staff Attendance option. The Staff Attendance window displays.

Full Name	Employee ID	Staff ID	District Code	Location Code	Attendance Period Start Date	Attendance Period End Date	Time Used	Staff Attendance Code

Generate Staff Attendance

Generate

Choose the appropriate fiscal year end from the drop-down and click . The Generate Staff Attendance window displays.



Generate Staff Attendance

Select the Employee(s) to generate Staff Attendance information for.

Employee Selection

Search Employee Group: (All) DepartmentName: (All) Building: (All) HRActiveFlag: Yes

Name	Employee ID	Position	Building	Employee Group
Aaron, Gene A	23	English Teacher	ELEM SCHOOL #66	TCH
Administrator, Alan	12	Asst Supt of Business	ADMINISTRATIVE CENT...	ADMIN
Administrator, Jill A	8	District Superintendent	ADMINISTRATIVE CENT...	ADMIN
Amsterdam, Jack A	1283	English Teacher - MS	MIDDLE SCHOOL #70	TCH
English, Susan	1277	English Teacher - MS	MIDDLE SCHOOL #70	TCH
Newemployee, Gerald T	44	Foreign Lang Tchr	HIGH SCHOOL #77	TCH
Newteacher, Diane	1276	TCH - Contractual	MIDDLE SCHOOL #70	TCH
Newteacher, Rhonda A	25	Math Teacher	MIDDLE SCHOOL #70	TCH
Principal, Howard M	37	Principal	MIDDLE SCHOOL #70	PRINC
Principal, Jamie E	38	Principal	ELEM SCHOOL #66	PRINC
Principal, John	1285	Principal	HIGH SCHOOL #77	PRINC
Principal, Kenneth H	39	Principal	MIDDLE SCHOOL #70	PRINC
Principal, Matthew J	41	Principal	MIDDLE SCHOOL #70	PRINC
Smith, John T	1	English Teacher - MS	MIDDLE SCHOOL #70	TCH

☐ Select All

Generation Criteria

Purge Existing Entries: No

Attendance Start Date: 07/01/2015

OK Cancel

The window displays a listing of those employees who have an active appointment within the selected fiscal year and the Report to Staff Snapshot flag is checked on the HR – Employee Information – Professional Information – Annual Performance Review tab.

Generate Staff Attendance records for selected or all employees. Use the Shift or Ctrl key and choose the consecutive or non-consecutive range of employees or check the Select All box to choose all employees.

If needed, change the drop-down to **Yes** to purge all existing entries. Note that if you have already generated for the selected time period and have added any attendance entries in Daily Attendance since the last time generating, you should choose Yes to this option. Leave the radio button set to No to leave previously generated entries.

The Attendance Start Date defaults to the starting date in the fiscal year selected. Leave the default date or change the date as needed.

Click **OK** to generate.

Staff Attendance

Fiscal Year: 07/01/2015 - 06/30/2016

Generate

Export

Attendance Code Mapping Report

Listing Report

Search

Drag a column header here to group by that column.

Full Name	Employee ID	Staff ID	District Code	Location Code	Attendance Period Start Date	Attendance Period End Date	Time Used	Staff Attendance Code
Aaron, Gene A	23	001523455	NY123456	0000	07/01/2015	06/30/2016	1.00	B
Newteacher, Rhonda A	25	001254524	NY123456	3366	07/01/2015	06/30/2016	2.00	J
Teacher, Diane	1279	001366555	NY123456	7471	07/01/2015	06/30/2016	1.00	S
Teacher, Samantha	10	001452145	NY123456	2804	07/01/2015	06/30/2016	2.00	J
Teacher, Samantha	10	001452145	NY123456	2804	07/01/2015	06/30/2016	1.00	S

Staff Attendance information is stored in nVision by fiscal year.

The information generated into the Staff Attendance window defaults from attendance records entered for your teaching staff via the Daily Attendance routine. Absence counts for each teacher are grouped under the Staff Attendance Code linked in the Attendance Code Setup table. Note that if the information is NOT in the appropriate areas, it will NOT be included in the record.

The Location Code is the NYSED Location Code linked to the buildings in which the employee's work. nVision looks at the building code, as entered in HR – Employee Information – Appointment Information – Building Assignment. The Location Code linked to that building is then pulled from **Building Codes Setup** (nVision Payroll – Setup – Codes – Buildings). If the employee works in more than one building, '0000' is reported.

If necessary, the Location Code can be changed in the Staff Attendance record by highlighting an employee name in the listing window and entering **Update** mode.

Demo CSD - Staff Attendance - Teacher, Diane

File Edit View Help

+ New Update Save Save and Close X |< >| Search

Staff Attendance

Name: Teacher, Diane Period Start Date: 07/01/2015

Employee ID: 1279 Period End Date: 06/30/2016

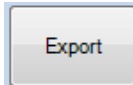
Staff ID: 001366555 Time Used: 1

Location Code: 7471 Staff Attendance Code: S

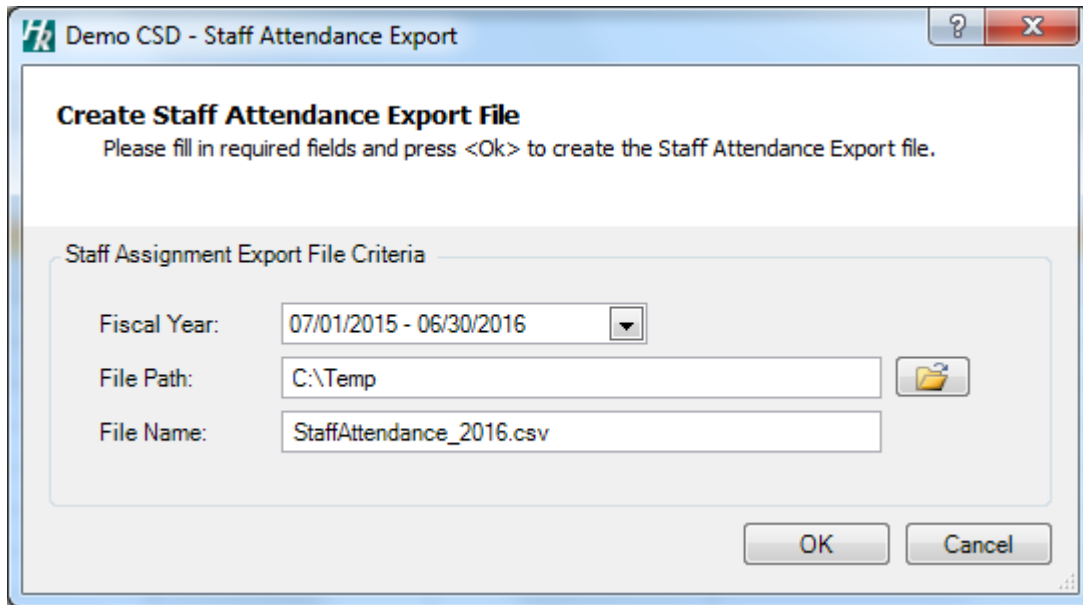
District Code: NY123456

Use the lookup to change the location code. Then save the record.


Staff Attendance Export File



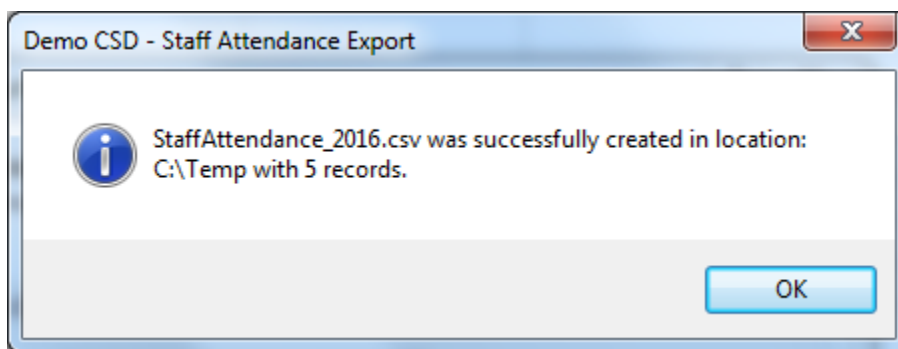
On the Staff Attendance listing window, click . The Staff Attendance Export window displays.

A screenshot of a software window titled "Demo CSD - Staff Attendance Export". The window has a blue header bar with a question mark icon and a close button. The main content area has a title "Create Staff Attendance Export File" and a subtitle "Please fill in required fields and press <Ok> to create the Staff Attendance Export file." Below this is a section titled "Staff Assignment Export File Criteria" containing three fields: "Fiscal Year:" with a dropdown menu showing "07/01/2015 - 06/30/2016", "File Path:" with a text box containing "C:\Temp" and a folder icon button to its right, and "File Name:" with a text box containing "StaffAttendance_2016.csv". At the bottom right are "OK" and "Cancel" buttons.

The Fiscal Year End date defaults to the current fiscal year end date. Use the drop-down to change the date, if needed.

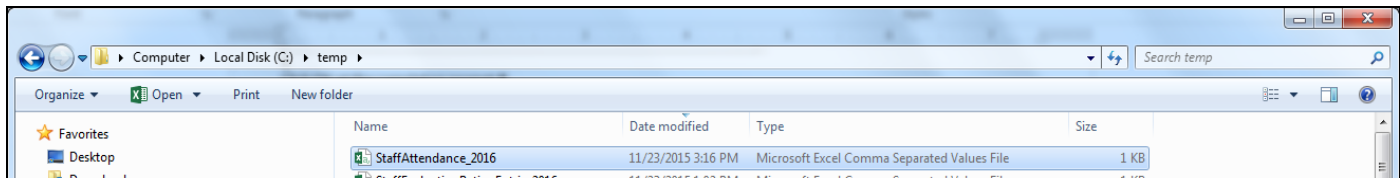
If desired, change the default path and **file name** of the export file. This output location is where nVision will place the data file which can be opened and viewed upon completion of the export. Click  to change the path of the file. The file will be a data file with the naming convention "StaffAttendance_FiscalYearEnd(YYYY format)" and the extension ".csv".

Click OK.

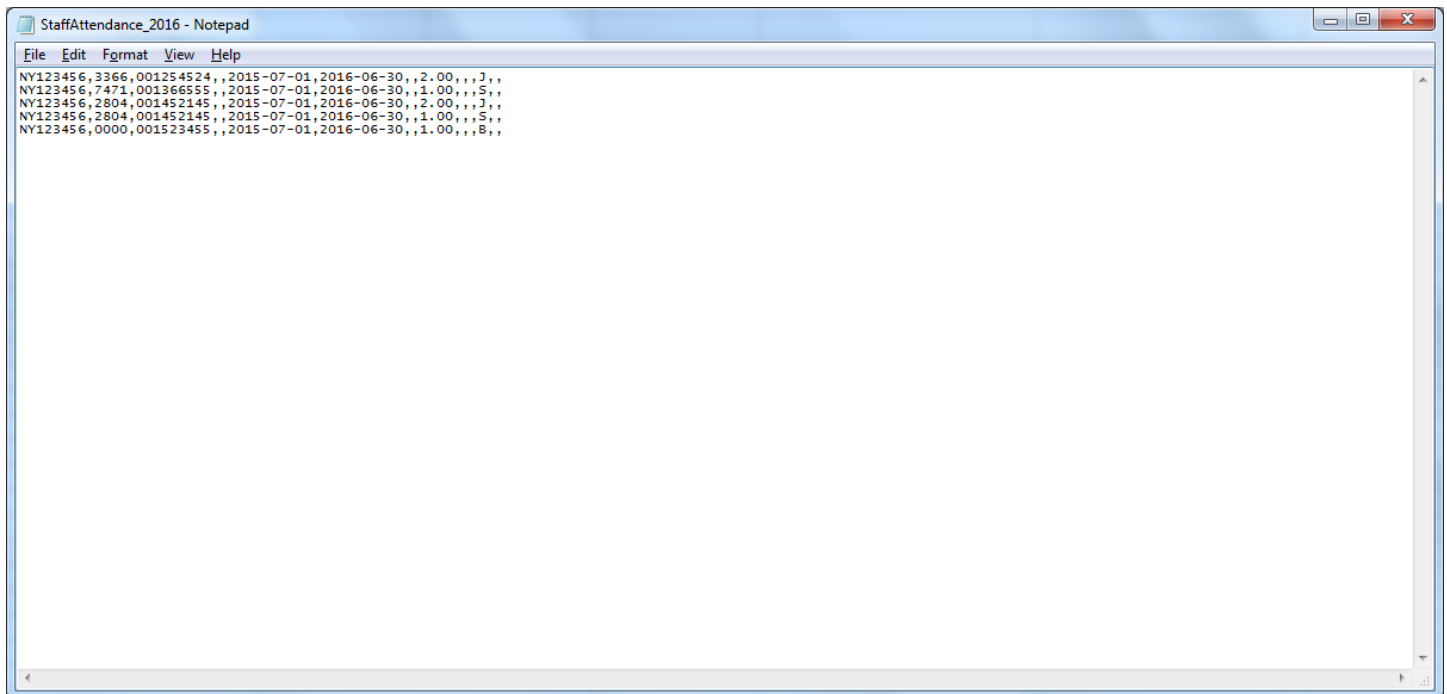


Click OK at the completion prompt.

Open the path of the output destination. In our example, we used the default output destination c:\temp.



Right click on the name and Open with Notepad to review the contents of the comma separated value (csv) file.



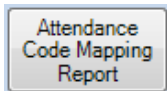
The data file contains those teachers who were not in attendance on a day in the reporting period when they were expected to teach.

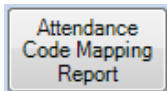
Each record includes the following information (As per NYSED specifications):

Remember that each field in the file is separated by a comma.

Field 1	'NY' + first six digits of the BEDS code if the facility is a School District; '8' + last seven digits of the Institution Code if the facility is designated a Charter School/Other
Field 2	NYSED Location Code (from the Buildings Setup table) that is linked to the building in which the employee works (HR – Employee Information – Appointment Information – Building Assignment tab). This field will be blank if the NYSED Location Code in Buildings Setup is blank. If the employee works in more than one building, the building code should be 0000.
Field 3	Teach ID (nine numeric characters, left-padded with zeros)
Field 4	Blank
Field 5	Attendance Period Start Date. This is the date entered on the Staff Attendance Generation window.
Field 6	Attendance Period End Date. June 30 of the selected reporting school year <u>OR</u> the date the teacher is no longer employed by the district.
Field 7	Blank
Fields 8	Number of days the teacher was absent for the specified staff attendance code. Only FULL days are reported.
Fields 9 thru 10	Blank
Field 11	Staff Attendance Code that identifies the type of absence. Valid codes are as follows: B – Bereavement Leave J – Jury Duty M – Maternity Leave O – Other P – Personal Leave S – Sick Leave
Fields 12 thru 13	Blank

Attendance Code Mapping Report



On the Staff Attendance listing window, click . The Staff Attendance Code Mapping Report window displays.

A screenshot of a software window titled "Demo CSD - Staff Attendance Code Mapping Report". The window has a standard Windows-style title bar with a question mark icon and a close button. The main content area has a title "Staff Attendance Code Mapping Report" and a subtitle "This report will list all relations that attendance codes have with staff attendance codes." Below this is a section labeled "Report Criteria" containing a checkbox labeled "Include Non Mapped Attendance Codes" which is checked. At the bottom of the window is a toolbar with a dropdown menu, a refresh icon, checkboxes for "Shared" and "Editable", a plus icon, a save icon, a close icon, an "Export" button with a green checkmark icon, a "Run" button, and a "Cancel" button.


Use this window to generate a listing of attendance codes that are linked to NYSED Staff Attendance Codes. Check the box to include those attendance codes that are NOT linked to a NYSED Staff Attendance Code.

Click  to open a Microsoft Excel spreadsheet OR  to generate a printable report.

The Staff Attendance Code Mapping Report is sorted by NYSED Staff Attendance Code. Under each NYSED Staff Attendance Code, the corresponding linked attendance code is displayed.

Demo CSD

Staff Attendance Code Mapping Report

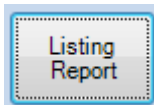


Staff Attendance Code	Attendance Code	Description	Unit Type	Charge To Attendance Code
<N/A>				
	CF	CONFERENCE DAY	Days	
	Comp Time	Comp Time	Days	
	T	Test	Hours	
	Vacation	Vacation Time	Days	
B - Bereavement Leave				
	FB	FAMILY BEREAVEMENT	Days	
J - Jury Duty				
	JD	JURY DUTY	Days	
P - Personal Leave				
	Leave	Employee Leave	Days	
	LV	ON LEAVE	Days	
	Personal	Personal Time	Days	
S - Sick Leave				
	FS	FAMILY SICK	Days	Sick
	Sick	Employee Sick	Days	
	Sick Leave	Sick Leave	Days	Sick

This report will help to ensure that all attendance codes in your setup table are linked back to the proper NYSED Staff Attendance Code. If you need to make changes in your Attendance Setup table, you can link the appropriate Staff Attendance Code, then re-generate the Staff Attendance, choosing to purge existing entries.

Staff Attendance Listing Report

In order to be sure that all required fields are completed for a successful Staff Attendance Export, the following listing can be generated that will tell you what information is currently in nVision that is to be included in the Staff Attendance.



On the Staff Attendance listing window, click . The Staff Attendance Listing Report window displays.

Use the drop-downs to choose the employee(s) and fiscal year end reporting date.

Click to open a Microsoft Excel spreadsheet OR to generate a printable report.

The Staff Attendance Listing Report provides the following information: employee name, employee ID number, staff ID (teacher ID), period start date, period end date, time used, and staff attendance code.

A sample report follows:

Demo CSD						
Staff Attendance Listing For The 2016 Fiscal Year						
Employee Name	Employee ID	Staff ID	Period Start Date	Period End Date	Time Used	Staff Attendance Code
Aaron, Gene A	23	001523455	07/01/2015	06/30/2016	1.00	B
Newteacher, Rhonda A	25	001254524	07/01/2015	06/30/2016	2.00	J
Teacher, Diane	1279	001366555	07/01/2015	06/30/2016	1.00	S
Teacher, Samantha	10	001452145	07/01/2015	06/30/2016	2.00	J
Teacher, Samantha	10	001452145	07/01/2015	06/30/2016	1.00	S

References:

<http://p1232.nysed.gov/irs/vendors/2015-16/documents/2015-16eScholarTemplatesNYS20160121.xls>

<http://www.p12.nysed.gov/irs/sirs/>

08242016