Staff Collections

Section Topics

Introduction

The OR Staff Collections menu item is available to assist in creating the Staffing collection reports and files required by the Oregon Department of Education. This menu item provides a utility to create and submit the Staff Positions, Staff Assignments and Class Size collections.

The Staff Collections Report is in Payroll/Human Resources > Reports > OR - Staff Collections Report.

From the Actions menu, the following commands are available:

COMMAND	DESCRIPTION
Generate Records	Select this command on each tab to generate the applicable report records.
Import USID Numbers	Select this command to import USID numbers from the state.
Update Report • Add Contract Position • Mass Update • Split Record	Select this command to add an employee position record to the grid on the Positions tab, update all records in the grid, and to split a record into multiple records.
Import File • Assignments Excel Import • Class Size Excel Import	Select this command on the Staff Assignments tab or Class Size tab to import report records from an Excel file. This is in lieu of generating records
Import Contracted Positions from Excel	Select this command to import positions on the Staff Positions tab from an Excel file.

COMMAND	DESCRIPTION

Setup
• Master Tables
  • Authorization-Level Codes
  • Classroom Types
  • Course Code/Endorsement Crosswalk
  • Course Codes
  • DAC Crosswalk
  • Grade Levels
  • HQ Determination
  • HQ Status Comment Codes
  • Institution Identifier
  • Level Of Staff Education
  • Not HQ
  • States
  • Title Flags Crosswalk
• Report Defaults Setup	

Reporting	Select this command to create the report file to submit to the state.

USER DEFINED FIELDS SETUP

Security > Workflow Configuration > User Defined Fields

Overview

Setup of the OR Staff Collections Report is necessary before the reports can be generated and sent to the State. User Defined Fields must be setup in Employee Maintenance and Employee Positions and Pay.

Activity *(Required)*

Set Up a User Defined Field

1. Add a User Defined Field by clicking **Add** on the tool bar or right-clicking on the grid and selecting *Add*.

2. In the Information group box, from the **Type** dropdown, select the applicable option.
3. Enter the **Sequence** for the item to display in the User Defined window.
4. In the **Name** field, enter a name for the added field.
5. From the **Data Type** dropdown, select the applicable option.
6. In the **Values** field, enter the options for the Data Type dropdown.
7. Mark the **Required** checkbox, if applicable.
8. Mark the **Close this dialog after update?** checkbox.
9. Click **OK** to save the User Defined Field or **Cancel** to exit without saving.
10. Add the following User Defined Fields:

NAME	TYPE	DATA TYPE	VALUES FOR DROP-DOWN AND/OR NOTES
Last State of Residence	Employee Maintenance	Text Field/Dropdown	Required if years of experience in district = 0. This is the letter abbreviation from the last state of residence.
Level of Staff Education Code	Employee Positions and Pay	Dropdown	List of applicable degrees can be found on the ODE Staff Collections web site. This is required even if the Employee Education crosswalk is used for generating this information.
Lowest Grade Responsibility	Employee Positions and Pay	Dropdown	List of applicable grades can be found on the ODE Staff Collections website.
Highest Grade Responsibility	Employee Positions and Pay	Dropdown	List of applicable grades can be found on the ODE Staff Collections website.

NAME	TYPE	DATA TYPE	VALUES FOR DROP-DOWN AND/OR NOTES
Special Education Age Group Code	Employee Positions and Pay	Dropdown	List of applicable sped age groups can be found on the ODE Staff Collections web site.
License Flag	Employee Positions and Pay	Dropdown	Y = Yes or N = No.
Highly Qualified Paraprofessional Flag	Employee Positions and Pay	Dropdown	Y = Yes or N = No.

PAYROLL/HUMAN RESOURCES CONFIGURATION SETUP

Race/Ethnicity Codes

Payroll/Human Resources > Configuration > Race/Ethnicity Codes

Before running the OR Staff Collections report, race/ethnicity must be setup.

Activity *(Required)*

Set Up Race/Ethnicity Codes

1. Add an item to the window by clicking on the **Add** button on the tool bar or right-clicking on the window and selecting **Add**.
2. The Add/Ethnicity Codes window displays. Add the following Race/Ethnicity Codes:

RACE/ETHNICITY	STATE CODE
African American or Black	B
American Indian or Alaskan Native	I
Asian	A
Pacific Islander or Native Hawaiian	P

RACE/ETHNICITY	STATE CODE
White	W

Multiple Races are reported with a semi-colon between each State Code. Examples are shown below:

African American and American Indian – B;I

African American and Asian – B;A

African American, Pacific Islander, and White – B;P;W

3. Click **OK** to save or **Cancel** to exit without saving.
4. After adding the last Race/Ethnicity Code, mark the **Close this dialog after update?** checkbox.
5. The added code(s) display in the grid.
6. Click on the 'x' in the upper right hand corner to exit the window. All items added are saved and available in the Employee's record.

Termination Codes

Payroll/Human Resources > Configuration > Termination Codes

Before running the OR Staff Collections report, race/ethnicity must be setup.

Activity *(Required)*

Set Up Termination Codes

1. Add an item to the window by clicking on the **Add** button on the tool-bar or right-clicking on the window and selecting *Add*.
2. The Add Terminations Codes window displays.
3. Add the following Termination Codes:

TERMINATION CODE	DESCRIPTION
01	Took a Position in another District in Oregon
02	Took a Position in another District Outside Oregon
03	Took a Position Outside the Field of Education
04	To Continue Education

TERMINATION CODE	DESCRIPTION
05	No Plans to Seek other Employment (Not Retired)
06	Leave of Absence or Sabbatical
07	Pregnant
08	Retired
09	Deceased
10	Other Known Reason
11	Unknown Reason

4. Click **OK** to save or **Cancel** to exit without saving.
5. After adding the last Termination Code, mark the **Close this dialog after update?** checkbox.
6. The added code(s) display in the grid.
7. Click on the ‘x’ in the upper right hand corner to exit the window. All added codes are saved and available in the Employee’s record.

State Position Codes

Payroll > Configuration > State Position Codes

Before running the OR Staff Collections report, termination codes must be setup.

Activity *(Required)*

Set Up Termination Codes

1. Add an item to the window by clicking on the **Add** button on the tool bar or right-clicking in the window and selecting **Add**.
2. The Add State Position Code widow displays.
3. Enter the **Code**, **Description**, and **Pay Table** in the appropriate fields. A current list of State Position Codes can be found on the ODE website.
4. Click **OK** to save or **Cancel** to exit without saving.
5. After adding the last State Position Code, mark the **Close this dialog after update?** checkbox.
6. The added code(s) display in the grid.

7. Click the ‘x’ in the upper right hand corner to exit the window. All added codes are saved and be available in the Employee’s record.

EMPLOYEE MAINTENANCE SETUP

Payroll/Human Resources > Employees > Employee Maintenance > Dates/Demographics tab

Overview

Before generating the OR Staff Collections Report, several items must be set up. These items must be setup and completed for each employee in order to pull into the report.

FIELD	NOTES
Ethnicity Codes	Choose the applicable option (Hispanic or Latino, and Not Hispanic or Latino) from the dropdown.
Race	Choose the applicable option from the dropdown.
This Employer	Years in District
Other Employers	Years Outside of Oregon
State Reportable	Years in Oregon This field should include ALL Years in Oregon, including Years in District.
Termination Codes	Select the appropriate Termination Code, if appropriate. It is not necessary to enter a Code of 00 if the employee is active.

EMPLOYEE POSITIONS AND PAY SETUP

Payroll/Human Resources > Employees > Employee Positions and Pay

Overview

Before generating the OR Staff Collections Report, several items must be set up. These items must be setup and completed for each employee in order to pull into the report.

FIELD	NOTES
State Code	Select the appropriate State Code from the dropdown menu for the employee’s position.

FIELD	NOTES
Rank	Select a Rank for the employee's position. Rank determines which positions pull into the report. Options are: Primary, Secondary, Other, Blank, and Supplemental. Supplemental positions only pull into the report if they have a position rank.
Low Grade Code	Select the applicable option from the predefined dropdown.
High Grade Code	Select the applicable option from the predefined dropdown.
Special Education Flag	Mark the checkbox if the position is a Special Education position.
Distance Learning Flag	Mark the checkbox if the position is a Distance Learning position.

In addition, the following fields on the User Defined Field tab should be filled out as appropriate.

NAME	NOTES
Level of Staff Education Code	If degrees are tracked in Human Resources, the crosswalk within the Staff Collections Report can be utilized to report Level of Staff Education. In this case, this field should be left blank.
Lowest Grade Responsibility	From the dropdown, select the Lowest Grade Responsibility to be reported for this position.
Highest Grade Responsibility	From the dropdown, select the Highest Grade Responsibility to be reported for this position.
Special Education Age Group Code	From the dropdown, select the Special Education Age Group if appropriate for this position.
License Flag	
Highly Qualified Paraprofessional Flag	

SETUP WITHIN THE OR STAFF COLLECTIONS REPORT

Payroll/Human Resources > Reports > OR Staff Collections

Overview

The following items need to be setup within the OR Staff Collections Report. Setup is in Actions > Setup.

<table>
<tr><th>MASTER TABLES SETUP</th><th colspan="3">DESCRIPTION</th></tr>
<tr><td>Authorization-Level Code</td><td colspan="3">Identify the following:
• Level Code
• Authorization Codes</td></tr>
<tr><td rowspan="4">Classroom Types</td><td colspan="3">Identify the Classroom Types
Types are:</td></tr>
<tr><td>Code</td><td>Class</td><td>Notes</td></tr>
<tr><td>M</td><td>Multiple Subject Class</td><td>Multiple courses are being taught to groups of students in this classroom/period, but each student is only taking 1 of the courses.</td></tr>
<tr><td>R</td><td>Regular Class</td><td>One course is being taught to all students in this classroom/period.</td></tr>
<tr><td>Course Code/Endorsement Crosswalk</td><td colspan="3">Identify the following:
• Course Code (Human Resources > Reports > OR Staff Collections > Actions > Setup > Master Tables > Course Codes)
• Endorsement (Master Endorsements from Human Resources > Configuration)
• Authorization-Level Code (Human Resources > Reports > OR Staff Collections > Actions > Setup > Master Tables >Authorization-Level Codes)</td></tr>
<tr><td>Course Codes</td><td colspan="3">Identify Course Codes.
These are the National Center for Education Statistics (NCES) or Non-NCES codes.</td></tr>
<tr><td>DAC Crosswalk</td><td colspan="3">Crosswalk each DACE to the Institution Code from the Oregon Department of Education.</td></tr>
<tr><td rowspan="12">Grad Levels</td><td colspan="3">Identify Grade Level codes.</td></tr>
<tr><td colspan="2">PK</td><td>Pre-Kindergarten</td></tr>
<tr><td colspan="2">KG</td><td>Kindergarten</td></tr>
<tr><td colspan="2">01</td><td>First Grade</td></tr>
<tr><td colspan="2">02</td><td>Second Grade</td></tr>
<tr><td colspan="2">03</td><td>Third Grade</td></tr>
<tr><td colspan="2">04</td><td>Fourth Grade</td></tr>
<tr><td colspan="2">05</td><td>Fifth Grade</td></tr>
<tr><td colspan="2">06</td><td>Sixth Grade</td></tr>
<tr><td colspan="2">07</td><td>Seventh Grade</td></tr>
<tr><td colspan="2">08</td><td>Eighth Grade</td></tr>
<tr><td colspan="2">09</td><td>Ninth Grade – Staff Positions only as of 6/30/12</td></tr>
</table>

MASTER TABLES SETUP	DESCRIPTION	
	10	Tenth Grade – Staff Positions only as of 6/30/12
	11	Eleventh Grade – Staff Positions only as of 6/30/12
	12	Twelfth Grade – Staff Positions only as of 6/30/12
	UE	Ungraded Elementary
	UM	Ungraded Middle
	US	Ungraded Secondary
	PS	Post-Secondary
HQ Determination	Identify the following Codes	
	Code	Description
	1	HQ – License/Endorsement
	2	HQ – HOUSSE
	3	Not HQ
	4	Cannot Determine
HQ Status Comment		
Institution Identifier	Identify the ODE Institution Identification number, Institution Name, City, County, School District and Education Service District for each Institution in the District or ESD.	
Level of Staff Education	Identify the Degree and Level of Education. Examples:	
	Degree	Level of Education
	AA	1 Less than Baccalaureate
	BA/BS	2 Baccalaureate Degree
	BA/BS+	3 Baccalaureate Plus Additional hours
	Masters	4 Master's Degree
	Doctorate	5 Doctorate
	More degrees can be added but the 5 Level of Education codes must be used to identify them.	
Not HQ	Identify the Code and Description as Follows:	
	Code	**Description**
	1	Regular Elementary Subject Matter competency
	2	Special Education Elementary Subject-Matter competency
	3	Elementary Emergency Certificate

MASTER TABLES SETUP	DESCRIPTION	
	4	Regular Secondary Subject-Matter competency
	5	Rural Secondary Subject-Matter Competency
	6	Special Education Secondary Subject-Matter Elig
	7	Special Education Secondary Subject-Matter NO
	8	Secondary Emergency Certificate
	9	Other
States	Identify States as follows:	
	State	**Description**
	CA	California
	ID	Idaho
	NV	Nevada
	OR	Oregon
	WA	Washington
	XX	Other State
	YY	Outside USA
Title Flags Crosswalk	Identify Account Masks and their corresponding Title I or Title II Flags.	

Activity *(Required)*

Set Up Report Defaults

1. From the Actions menu, select **Setup > Report Defaults**. The Report Defaults Setup window displays.
2. From the **Institution Identifier, Employer Staff Identifier, Last State Of Residence Field** dropdowns, select the applicable option.
3. From the **Level of Education, Low Grade Responsibility, High Grade Responsibility, Special Ed Age Group, License Flag**, and **HQ Paraprofessional** dropdowns, choose the applicable state defined option to crosswalk to.
4. These fields must be populated as the report uses the information from these fields rather than the fields on the State Data tab.
5. Select 1 **Position Per Line** to have 1 line generate for every employee position.
6. If this option is selected the following error displays: “Please set up all user defined field definitions in the defaults table before generating" if any of the required UDF fields are not populated.

7. To roll positions, select **Roll Positions**.
8. If the positions have the same position code (State Code) and the same assigned institution (DAC), contract length and rate are averaged.
9. FTE and Salary are summed.
10. Click **OK** to save changes or **Cancel** to exit.

MASTER TABLES SETUP

Payroll/Human Resources > Reports > OR – Staff Collections Report

Overview

Master Tables need to be setup prior to generating records for records to pull into the grid.

Activity *(Required)*

Set Up Master Tables

1. Select **Setup > Master Tables** from the Actions menu. The system displays a menu list of the Master Tables.
2. Master Tables to be completed are: **Classroom Types, Course Codes, DAC Crosswalk, Grade Levels, HQ Determination, Institution Identifier, Level of Staff Education, Not HQ, States,** and **Title Flags Crosswalk**.
3. Select the master table name to open the grid for the table.
4. When the table grid displays, right-click and select **Add** to add another item to the table.
5. Delete a record from the table grid by selecting it and using the **Delete** key.
6. Click **OK** to save changes or **Cancel** to exit without saving changes.

Authorization-Level Codes

Human Resources > Reports > OR Staff Collections

Master Authorization Levels and Level Code combinations can be added to this table. There can be duplicates of both Authorization and Level Code; however, there can only be 1 Level Code II, Authorization Level ELE combination. This is tied to the Course Code/Endorsement Crosswalk.

Activities *(Required)*

Set Up Authorization-Level Codes

1. Select **Setup > Master Tables > Authorization-Level Codes** from the Actions menu. The system displays a menu list of the Master Tables. The Authorization-Level Codes window displays.
2. Click **Add** on the tool-bar or right-click and select **Add**. The Add Authorization-Level Codes window displays.
3. Type the **Level Code** and **Authorization Code** in the applicable fields.
4. After adding the last code, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save or **Cancel** to exit without saving. The Authorization Level Codes grid displays with the added records

Edit Authorization-Level Codes

1. Select **Setup > Master Tables > Authorization-Level Codes** from the Actions menu. The Authorization Level Codes window displays.
2. Double-click on the record to edit, or right-click and select **Edit**. The Edit Authorization-Level Codes window displays.
3. Make any necessary changes to the Level Code and Authorization Code. Mark the **Close this dialog after update?** checkbox.
4. Click **OK** to save the edited record or **Cancel** to exit without saving the record. The Authorization Level Codes window displays.

Delete Authorization-Level Codes

1. To delete a record, select the record to delete and press the DELETE key on the keyboard. The Remove Rows window displays.
2. Click **Yes** to delete the record or **No** to exit without deleting the record. The record is deleted from the grid.

Import Authorization-Level Codes from Excel

1. Select **Setup > Master Tables > Authorization-Level Codes > Actions > Import From Excel** from the Actions menu. The Staff Collections Authorization-Level Codes Excel Import window displays.
2. Enter the appropriate spreadsheet columns for **Level Code** and **Authorization Date** in the applicable fields.

3. If the file includes a header line, mark the **File Includes Header Line** checkbox.
4. In the **File Location** field, enter the path or click the ellipse button and browse to the location of the saved file.
5. In the **Worksheet Name** field, enter a name.
6. Click **OK** to import the codes or **Cancel** to exit without importing the codes.
7. A message displays stating the import was successful. Click **OK**. The grid displays with the imported codes.
8. Click **OK** to save or **Cancel** to exit.

Classroom Types

Payroll/Human Resources > Reports > OR Staff Collections Report

Classroom Types Master Table includes a Code and Description for Classroom Types. This information is used in the Staff Assignments tab of the report.

Activities *(Required)*

Add a Classroom Type

1. Go to **Actions > Setup > Master Tables > Classroom Types**. The Add Classroom Types window displays.
2. Click the **Add** button on the tool bar or right-click on the grid and select **Add**. The Add Classroom Types window displays.
3. Enter the **Code** and **Description** in the applicable fields.
4. After the last Type is added, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save the added Type or **Cancel** to exit without saving the added Type. The Classroom Types window displays with the added Classroom Types.
6. Click **OK** to save the changes or **Cancel** to exit without saving.

Edit a Classroom Type

1. To edit a Classroom Type, double-click the selected record or right-click on the grid and select **Edit**. The Edit Classroom Types window displays.
2. Enter the **Code** and **Description** in the applicable fields.
3. After adding the last Type, mark the **Close this dialog after update?** checkbox.

4. Click **OK** to save the edited Type or **Cancel** to exit without saving the edited Type. The Classroom Types window displays with the edited Classroom Type.
5. Click **OK** to save the changes or **Cancel** to exit without saving.

Course Code/Endorsement Crosswalk

Human Resources > Reports > OR Staff Collections

This table crosswalks the Course Code to the Valid Endorsement/Authorization Level Codes. (SEE: Import From Excel.)

Activities *(Required)*

Set Up Course Code/Endorsement Crosswalk

1. Go to **Actions > Setup > Master Tables > Course Code/Endorsement** Crosswalk. The Add Course Codes/Endorsement Crosswalk window displays.
2. Click **Add** on the tool bar or right-click and select **Add**. The Add Course Codes/Endorsements Crosswalk window displays.
3. Enter the **Course Code** (from Human Resources > Reports > OR Staff Collections > Actions > Setup > Master Tables > Course Codes), **Endorsement** (from master endorsements in Human Resources > Configuration), and **Authorization-Level Code** (from Human Resources > Reports > OR Staff Collections > Actions > Setup > Master Tables > Authorization-Level Codes) from the appropriate dropdown.
4. After the last item has been entered, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save or **Cancel** to exit without saving. The Course Code/Endorsement Crosswalk grid displays with the added records.

Edit Course Code/Endorsement Crosswalk Records

1. Select **Setup > Master Tables > Course Code/Endorsement Crosswalk** from the Actions menu. The Add Course Codes/Endorsement Crosswalk window displays.
2. Double-click the record to edit, or right-click and select **Edit**. The Edit Course Codes/Endorsement Crosswalk window displays.
3. Make any necessary changes to the **Course Code**, **Endorsement**, and **Authorization-Level Code**.

4. Click **OK** to save the edited record or **Cancel** to exit without saving the record. The Course Code/Endorsement Crosswalk window displays.

Delete Course Code/Endorsement Crosswalk Records

1. To delete a record, select the record to be deleted and press the DELETE key on the keyboard. The Remove Rows window displays asking to confirm the delete the selected row from the grid.
2. Click **Yes** to delete the record or **No** to exit without deleting the record. The record is deleted from the grid.

Import Course Code/Endorsement Crosswalk

1. From the Actions menu, select **Setup > Master Tables > Course Code/Endorsement Crosswalk**. The Add Course Codes/Endorsement Crosswalk window displays.
2. From the Actions menu, select **Import From Excel**. The Staff Collections Course Code/Endorsement Crosswalk window displays.
3. Enter the appropriate Excel column in the **Course Code, Endorsement**, and **Authorization-Level Code** fields.
4. If the file includes a header click the ellipse button and search for the desired location.
5. In the **Worksheet** field, enter a name to identify the worksheet.
6. Click **OK** to import the file or **Cancel** to exit without importing the file. A message displays stating the import was successful.
7. Click **OK**. The Course Code/Endorsement Crosswalk grid re-displays.
8. Click **OK** to save or **Cancel** to exit.

Course Codes

The Master Table Course Codes is comprised of the Code and Course Description. Course Codes are used in the Staff Assignments tab.

Activities *(Required)*

Add Course Codes

1. From the Actions menu, select **Setup > Master Tables > Course Codes**. The Add Classroom Types window displays.
2. Click the **Add** button on the tool bar or right-click on the grid and select **Add**. The Add Course Codes window displays.

3. Enter the **Code** and Description in the applicable fields.
4. From the **Course Type** dropdown, select the applicable option. Options are: *Core Content, Non-Core Content*, or *CTE*.
5. After the last code is added, mark the **Close this dialog after update?** checkbox.
6. Click **OK** to save the added Course Codes or **Cancel** to exit without saving the added Course Codes. The Course Codes window displays with the added Course Codes.
7. Click **OK** to save the changes or **Cancel** to exit without saving.

Edit Course Codes

1. To edit a Course Code, double-click the selected record or right-click on the grid and select **Edit**. The Edit Course Codes window displays.
2. Type the **Code** and **Description** in the applicable fields.
3. Click **OK** to save the edited Course Codes or **Cancel** to exit without saving the edited Course Codes. The Course Codes window displays with the edited record.
4. Click **OK**.

Import Course Codes from Excel

1. From the Actions menu, select **Setup > Master Tables > Course Codes**. The Course Codes window displays.
2. From the Actions menu, select **Import From Excel**. The Staff Collections Course Codes Excel Import window displays.
3. Enter the appropriate column from Excel in the **Code, Course Description,** and **Course Type** fields.
4. If the file includes a header line, mark the **File Includes Header Line** checkbox.
5. In the **File Location** field, enter the path or click the **Browse (...)** button to navigate to the location.
6. In the **Worksheet** name field, enter the name.
7. Click **OK** to import the file or **Cancel** to exit without importing the file. A message displays stating the file has imported successfully.
8. Click **OK**. The Course Codes grid displays with the imported records.
9. Click **OK** to save or **Cancel** to exit.

DAC Crosswalk

DAC Crosswalk is used to crosswalk district DACs to the state defined institution in order to pull accurately report to the state.

Activities *(Required)*

Add DAC Crosswalk

1. From the Actions menu, select Setup > Master Tables. The Add DAC Crosswalk window displays.

   > Each defined DAC in IVEE must be linked to the appropriate state defined institution. Many institutions codes can be linked to 1 DAC but only 1 combination per DAC can be marked as Primary.

2. To Add a record, click **Add** on the tool bar or right-click in the grid and select **Add**. The Add DAC Crosswalk window displays.
3. From the **DAC Description and Institution Code** dropdown, select the applicable option.
4. If this is the primary institution code for this DAC, mark the **Primary** checkbox. Otherwise, clear the checkbox.
5. If there are currently no additional DACs to define, mark the **Close this dialog after update?** checkbox.
6. Click **OK** to save the crosswalk or **Cancel** to exit without saving. The DAC Crosswalk window displays with the added DACs.

Edit DAC Crosswalk

1. To edit the DAC Crosswalk, double-click on the crosswalk. The Edit DAC Crosswalk window displays.
2. Make the necessary changes to the **DAC Description, Institution Code**, or the **Primary** field.
3. Click **OK** to save the changes or **Cancel** to exit without saving.

Grade Levels

The Grade Levels Master Table includes a 2-digit designation for grade and a text description. The Grade Levels are available on the Staff Positions tab in the Low Grade and High Grade Responsibility Code fields.

Activities *(Required)*

Add Grade Levels

1. To add Grade Levels, select **Actions > Setup > Master Tables > Grade Levels**. The Add Grade Levels window displays.
2. Click **Add** on the tool bar or right-click in the grid and select **Add**. The Add Grade Levels window displays.
3. Enter the grade and description in the applicable fields. After adding the last grade level, mark the **Close this dialog after update?** checkbox.
4. Click **OK** to save the added Grade Levels or **Cancel** to exit without saving. The Grade Level window displays with the added Grade Levels.
5. Click **OK** to save the changes or **Cancel** to exit without saving.

Edit Grade Levels

1. To edit Grade Levels, double-click a record or right-click in the grid and select **Edit**. The Edit Grade Levels window displays.
2. Enter the **Grade** and **Description** in the applicable fields.
3. Click **OK** to save the edited Grade Levels or **Cancel** to exit without saving. The Grade Levels window displays.

HQ Determination

The HQ Determination Master Table includes a 1-digit code and description. This information displays in the HQ Status Determination field of the Staff Assignments tab.

Activities *(Required)*

Add HQ Determination

1. To add an HQ Determination, select **Actions > Setup > Master Tables > HQ Determination**. The Add HQ Determination window displays.
2. Click **Add** on the tool bar or right-click in the grid and select **Add**. The Add HQ Determination window displays.
3. Enter the code and description in the applicable fields.
4. After adding the last code, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save or **Cancel** to exit without saving. The HQ Determination window displays with the added records.

Edit HQ Determination

1. To edit an HQ Determination, double-click the selected record or right-click in the grid and select **Edit**. The Edit HQ Determination window displays.
2. Enter the code and description in the applicable fields.
3. Click **OK** to save **Cancel** to exit without saving. The HQ Determination window displays with the added records.
4. Click **OK** to save the changes or **Cancel** to exit without saving.

Institution Identifier

The Institution Identifier Master Table includes Institution ID, Institution Name, City, County, School District, and Educational Service District.

Activities *(Required)*

Add Institution Identifier

1. To add an Institution Identifier, select **Actions > Setup > Master Tables > Institution Identifier**. The Add Institution Identifier window displays.
2. Click **Add** on the tool bar or right-click and select **Add**. The Add Institution Identifier window displays.
3. Enter the applicable information in the **Institution ID, Institution Name, City, County, School District,** and **Education Service District** in the fields.
4. After adding the last identifier, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save the added Identifier or **Cancel** to exit without saving. The Institution Identifier window displays.

Edit Institution Identifier

1. To edit an Institution Identifier, double-click the record to edit or right-click in the grid and select **Edit**. The Edit Institution Identifier window displays.
2. Edit the information as needed.
3. Click **OK** to save the edited Identifier or **Cancel** to exit without saving. The Institution Identifier grid displays.
4. Click **OK** to save changes or **Cancel** to exit without saving.

Level of Staff Education

This crosswalk table populates the Level of Staff Education Code field in the Staff Positions grid. If an employee is assigned a Degree in HR and there is a Degree/Level of Staff Education combination in the Level of Staff Education Master Table, the degree information populates into the Level of Staff Education Code field in the Staff Positions grid.

This crosswalk is only available if the district has purchased the IVEE Human Resources module.

Activities *(Required)*

Add a New Level of Staff Education Record

1. To add a new record, select **Actions > Setup > Master Tables > Level of Staff Education**. The Add Level of Staff Education window displays.
2. Click **Add** on the tool bar or right-click in the grid and select **Add**. The Add Level of Staff Education window displays.
3. From the **Degree and Level of Education** dropdown, select the applicable option.
4. After adding the last level, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save the Level of Education or **Cancel** to exit without saving. The Level of Education grid displays with the added records.
6. Click **OK** to save or **Cancel** to exit without saving.

Edit a Level of Staff Education Record

1. To edit the Level of Education, double-click on the record to edit or right-click in the grid and select **Edit**.
2. The Edit Level of Staff Education window displays.
3. Select the Level of Education and click **OK** to save or **Cancel** to exit without saving.

Not HQ

The information defined in the Not HQ grid display in the Reason Not HQ dropdown on the Staff Assignments tab of the report when editing an employee record.

Activities *(Required)*

Add a Not HQ Record

1. To add a Not HQ record, select **Actions > Setup > Master Tables > Not HQ**. The Add Not HQ window displays.

2. Click **Add** on the tool bar or right-click in the grid and select **Add**. The Add Not HQs window displays.
3. Enter the code and description in the applicable fields.
4. After adding the last record, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save the added code or **Cancel** to exit without saving. The Not HQ grid displays.
6. Click **OK** to save the changes or **Cancel** to exit without saving.

Edit a Not HQ Record

1. To edit a Not HQ record, double-click the selected record or right-click in the grid and select **Edit**. The Edit Not HQ window displays.
2. Enter the code and description in the applicable fields.
3. Click **OK** to save the edited code or **Cancel** to exit without saving the edited code. The Not HQ grid displays.

States

Information from the States Master Table display in the Last State of Residence field in the Staff Positions tab of the report. If Last State of Residence is setup in the User Defined Fields in Employee Maintenance, the report pulls in the data as defined in Actions > Setup > Report Defaults Setup. Otherwise, the report pulls in the data from Actions > Setup > Master Tables > States.

Activities *(Required)*

Add a State

1. To add a State, select **Actions > Setup > Master Tables > States**. The Add States window displays.
2. Click **Add** on the tool bar or right-click in the grid and select **Add**. The Add States window displays.
3. Enter the state (abbreviation) and description in the applicable fields.
4. After adding the last state, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save the added State or **Cancel** to exit without saving. The States grid displays.

Edit a State

1. To edit a State, double-click the selected record or right-click in the grid and select **Edit**. The Edit States window displays.
2. Enter the state (abbreviation) and description in the applicable fields.
3. Click **OK** to save the edited State or **Cancel** to exit without saving. The edited records display in the States grid.

Title Flags Crosswalk

The Title Flags Crosswalk Master Table determines Title I-A and Title II-A by account mask.

> The User Defined fields in Employee Positions and Pay are no longer used for this report.

Activities *(Required)*

Add a Title Flags Crosswalk

1. To add a Title Flags Crosswalk, select **Actions > Setup > Master Tables > Title Flags Crosswalk.** The Add Title Flags Crosswalk window displays.
2. Select **Add** on the tool bar or right-click in the grid and select **Add**. The Add Title Flags Crosswalk window displays.
3. In the **Account Mask** field, enter the mask.
4. Click on either the defined Account Mask depending on whether it is a Title I-A Flag or a Title II-A Flag.
5. After adding the last flag, mark the **Close this dialog after update?** box.
6. Click **OK** to save the crosswalks or **Cancel** to exit without saving. The Title Flags grid displays.
7. Click **OK** to save the changes or **Cancel** to exit without saving.

Edit a Title Flags Crosswalk

1. To edit a record, double-click on the record to edit or right-click in the grid and select **Edit**. The Edit Title Flags Crosswalk window displays.
2. In the **Account Mask** field, enter the mask.
3. Click on either the defined Account Mask depending on whether it is a Title I-A Flag or a Title II-A Flag.
4. Click **OK** to save the crosswalks or **Cancel** to exit without saving the crosswalks. The edited crosswalks display in the grid.
5. Click **OK** to save the changes or **Cancel** to exit without saving.

GENERATE RECORDS

Menu Path > Menu Path > Menu Path > Menu Path

Overview

The Staff Collections Report grid consists of 3 tabs: Staff Positions, Staff Assignments and Class Size. Records must be generated from the Staff Positions, Staff Assignments, and Class Size tabs for records to populate the grids.

This action populates the grids where the position start date is on or before the date selected, AND the position end date is on or after the date selected. The position grid is populated with employees with certified and classified positions. Only Certified positions are included in the Staff Assignments grid.

Activity *(Required)*

Generate Records

1. To generate records, select the tab (**Staff Positions, Staff Assignments or Class Size**) to generate records.
2. From the Actions menu, select **Generate Records**. The Staff Collection Report window displays.
3. Choose the Position Rank to include in the report. Options **are Primary, Secondary, Other** or **Blank** (no position rank defined in Employee Positions and Pay).
4. If applicable, mark **Supplementals to include in the report**.
5. Supplemental positions populate for all positions with a position rank.
6. Mark the **Include Closed Positions** checkbox to have closed positions pull into the report.
7. Closed positions populate for all positions with a position rank.
8. Select the **Date** for the report to be run by either typing in the date or by selecting the date from the dropdown calendar.
9. In the **Report Name** field, enter a name to identify the report.
10. Click **OK** to populate the grids or **Cancel** to exit without populating the grids. Records meeting the selected criteria populates the grid.

The Class Size and Staff Assignments grids can also be populated by selecting Actions > Import (to import records from Excel) or by manually adding data to the grid.

IMPORT USID NUMBERS

Payroll > Employees > Employee Maintenance

Overview

The Staff Collections Report imports USID Numbers from the State. The imported USIDs populate the State ID field in Payroll > Employees > Employee Maintenance.

Activity *(Required)*

Import USID Numbers

1. To import USID Numbers, select **Actions > Import USID Numbers**. The Import USID Numbers window displays.
2. Select the File Location by either entering the location or by clicking the **Browse (...)** button to navigate to the location of the import file.
3. Select the file.
4. Click **OK** to import the USID Numbers or **Cancel** to exit without importing.
5. A message displays stating the import was successful. Click **OK**.

CONTRACTED EMPLOYEES

Overview

Districts are required to report all contracted employees (Contracted Employees are those who work for the District but are not paid as employees). Typically, they are paid through Accounts Payable. Since they are not employees, all the information for the employee must be entered into the Contracted Employee to the State through the Staff Collections Report. Records can be created by importing contracted employees or adding contracted employees manually. record and/or Excel file.

Activity *(Required)*

Add Contract Position

1. From the Actions menu, select the **Staff Positions** tab and then select **Actions > Update Report > Add Contract Position**. The Add Contract Employees Grid window displays.
2. Complete the **Last Name, First Name, Middle Name, Suffix**, and **SSN** fields by entering the information as applicable.

3. Select the **Date Of Birth** by either entering the date or by selecting the date from the dropdown calendar.
4. From the **Gender** dropdown, select the applicable option.
5. Complete the **Employee ID, State ID,** and **TSPC ID** field by entering information as applicable.
6. From the **Race and Ethnicity** dropdown, select the applicable option.
7. In the **Primary Job Title** field, enter the title.
8. From the **Category** dropdown, select the applicable option.
9. In the **Position Description** field, enter a brief description for the position.
10. From the **Assigned Institution** and **Position Code** dropdown, select the applicable option.
11. Enter the **Position Comment, Position FTE**, **Position Salary**, and **Position Rate**.
12. From the **PERS Pickup** dropdown, select the applicable option.
13. In the **Contract Length** and **Full Contract** field, enter the information as applicable.
14. From the **Last State of Residence** and **Termination Code** dropdown, select the applicable option.
15. In the **Years In District, State Reportable**, and **Outside of Oregon** fields enter the information as applicable.
16. From the **Level Of Staff Education Code, Low Grade Responsibility Code, High Grade Responsibility Code; Special Ed Age Group Code, License Flag, Highly Qualified Paraprofessional Flag, Title I-A Flag**, and **Title II-A Flag** dropdowns, select the applicable options.
17. After adding the last record, mark the **Close this dialog after update?** checkbox.
18. Click **OK** to add the Contracted Employee or **Cancel** to exit without adding the Contracted Employee. The Contracted Employee displays in the grid.

IMPORT CONTRACT POSITIONS FROM EXCEL

Overview

Contracted Employees can also be added to the OR Staff Collections Report by importing from Excel.

Before importing, first setup the Excel file. Format the file as follows and then enter the appropriate data into the file.

DATA	DESCRIPTION
Last Name	This is the last name of the employee.
First Name	This is the first name of the employee.
Middle Name	This is the middle initial of the employee.
Suffix	This is the suffix of the employee, if any.
SSN	This is the Social Security Number of the employee. Format as XXX-XX-XXXX.
DOB	This is the birth date for the employee. Format as XX/XX/XXXX.
Gender	This is the gender of the employee. Indicate M (Male) or F (Female).
Employee ID	This is the Employee ID given by the entity or school district.
State ID	This is the employee's State ID issued by the State.
TSPC ID	The TSPC ID is the Teacher Standards and Practices Commission assigned account identifier.
Race	This is the employee's Race. For example, White or Asian.
Ethnicity	This is the employee's ethnicity (Hispanic/Latino or Not Hispanic/Latino). This is a Y/N field.
Primary Job Title	This is the primary job title for the employee.
Employee Category	This field identifies the category in which an employee is defined. An example would be a Contracted Employee.
Position Description	This is the description of the contracted employee's position.
Assigned Institution	This is the DAC assigned to the employee's position. The DAC field is compared to the Institution Name in Actions | Master Tables > Institution Identifier. The Institution ID associated with the Institution Name in Actions > Master Tables > Institution Identifier is populated in the Assigned Institution column.
Position Code	The Position Code is the code describing the position filled by the contracted employee, or the function most like the staff member's duties.
Position Comment	Position Comment is a comment describing services rendered by the staff member.

DATA	DESCRIPTION
Position FTE	FTE is the proportion of a full-time position anticipated for the position. It is computed by dividing the unit of time scheduled to be worked by the unit of time normally considered full-time.
Position Salary	Salary is the amount of the position's base salary in whole dollars. It does not include extra duty pay, stipend amounts, or other compensation above and beyond the amount provided for by the basic contract.
Position Rate	The Rate is the Hourly Rate the staff person is being paid for the position.
Pers Pickup	PERS Pickup is a flag indicating the employer pays the employee's share of the PERS (Public Employees' Retirement System) contribution for this position. Enter Y/N in this field.
Contract Length	Contract Length is the total number of whole days the staff member is expected to work as specified in the position contract. For recently separated employees (within the current year) this represents the total number of whole days the staff member actually worked during the school year.
Full Contract Length	Full Contract Length is the total number of whole days in a typical full school year contract for this position.
Last State of Residence	The Last State of Residence code indicates the state in which the staff member resided just prior to beginning employment with the district. This is the 2 letter identifier. An example would be OR for Oregon.
Termination Code	If an employee is terminated, this is the code as identified in Payroll/Human Resources > Configuration > Termination Codes.
Years in District	This is the number of years the employee has been employed with the district under Oregon licensure, cumulatively in any position. This number does not include the current year. New hires are represented by a "0." Any service of a half-year or more is counted as 1 full year, excluding the current year.
State Reportable	This is the number of years required to be reported to the State for the employee.
Outside of Oregon	This is the number of years the employee was employed outside of the state of Oregon.
Classification	Classification indicates whether the employee is Certified Admin, Certified Non-Admin, or Classified.

DATA	DESCRIPTION
Level of Staff Education Code	The Level of Education code indicates the highest level of education attained by the staff member. Only the first 3 numbers of the code need to be entered.
Low Grade Responsibility Code	Low Grade Responsibility is the code indicating the lowest grade level for which the position is responsible. In the case of teachers, this represents the lowest grade the teacher actually teaches. In the case of administrators, this represents the lowest grade served by the institution.
High Grade Responsibility Code	High Grade Responsibility is the code indicating the highest grade level for which the position is responsible. In the case of teachers, this represents the highest grade the teacher actually teaches. In the case of administrators, this represents the highest grade served by the institution.
Special Ed Age Group Code	Special Education Age Group Code is the code indicating the age group to which the position provides specialized Special Education services. Only the first 2 numbers of the code need to be entered.
License Flag	License Flag is a flag indicating the staff member holds a current license for this position from the appropriate regulatory agency. Enter a Y/N in this field.
HQ Paraprofessional Flag	The Highly Qualified Paraprofessional Flag is a flag indicating the staff member is a highly qualified paraprofessional in this position. Paraprofessionals are considered ‘highly qualified’ by virtue of having taken a paraprofessional exam, or through presentation of college credits equivalent to an Associate’s Degree. Enter a Y/N in this field.
Title I A Flag	The Title I-A Flag is a flag indicating the position is funded in any part by Title I-A Funds, regardless of how small the amount may be. Enter a Y/N in this field.
Title II A Flag	The Title II-A Flag is a flag indication the position is funded in any part by Title II-A funds for the purpose of reducing class sizes, regardless of how small the amount may be. Enter a Y/N in this field.

Activity *(Required)*

Import Contract Positions from Excel

1. Verify the Staff Positions tab is active. From the Actions menu, select **Import Contract Positions from Excel**. The Staff Collections Contract Positions Import from Excel window displays.
2. According to the data location as entered in the Excel file to import, verify the column letter of the data.
3. If there is not a column of data, leave the column letter blank. For example, if the Excel file does not include Suffix, delete the column letter of D and leave the column letter blank.
4. If the Excel file has a header line in Row 1, leave the default File Includes Header Line marked.
5. If Row 1 of the Excel file includes the very first person to import, clear the File Includes Header Line box.
6. Click the **Browse (...)** button in the File Location field to browse to the Excel file to import.
7. The default worksheet name Excel creates is Sheet1. If using the default name, leave Sheet1 in the **Worksheet** field.
8. If the sheet is renamed in the Excel file, enter the needed worksheet name in the **Worksheet** field.
9. In the **Report Name** field, enter a name to identify the report.
10. Once the data in the Staff Collections Contract Positions Import from Excel file is entered, click **OK**.
11. The records are imported into the Staff Positions grid and the Report Name is available for selection from the Report Name dropdown.

EDIT RECORDS

Overview

If necessary, edit records in each of the tab grids.

Activity *(Required)*

Edit Records

1. Select the tab to containing records to edit.
2. Double-click the record to edit or right-click on the grid and select **Edit**.

3. Depending on the selected tab, the Edit window for the tab displays. Make changes as needed.
4. Click **OK** to save the changes or **Cancel** to exit without saving the changes.

Add Records

1. Select the tab to add a record.
2. Click the **Add** button on the tool bar or right-click on the grid and select **Add**. The Add window displays for the grid.
3. Add the information.
4. After adding the last record, mark the **Close this dialog after update?** checkbox.
5. Click **OK** to save the added record or **Cancel** to exit without saving the record.

MASS UPDATE

Overview

There may a need at times to mass update all records in the grid.

Activity *(Required)*

Mass Update Records

1. To mass update records, select the data to mass update by choosing the appropriate tab.
2. Filter the grid for the records to mass update. Select **Actions > Update Report > Mass Update**. The system displays the Update Data window.
3. From the **Data Field** dropdown, select the applicable option.
4. The New Value field becomes available for entering information or selecting from the dropdown.
5. Enter or select the values.
6. Click **OK** to save changes or **Cancel** to exit without saving changes.
7. The Update Data message window displays stating all records in the grid are updated.
8. Click **Yes** to continue, **No** to make further changes, or **Cancel** to exit without mass updating.
9. A message displays stating the update was successful. Click **OK**. The records are now updated with the new value in the grid.

SPLIT RECORDS

Overview

There may be a need at times to split a record. For example, in Infinite Visions, positions are stored as 1 record even though they need to be reported on the Staff Assignments and Class Size collections as 1 record per period taught. So, if the employee pulls into the report with 1 position but needs to be reported on the Staff Assignments collection with 6 periods, choose the option to split the 1 record into 6.

Activity *(Required)*

Split a Staff Collections Record

1. To split a Staff Collections record, go to **Payroll/Human Resources > Reports > OR - Staff Collections Report**. Records can only be split on the Staff Assignments and Class Size grids.
2. Select the record to split.
3. Select **Update Report** from the Actions menu and then select **Split Record**. A message displays confirming to split the record.
4. Click **Yes** to continue, or **No** to exit without splitting the record.
5. The Split Records message window displays asking how many final records are needed.
6. Enter the number as applicable.
7. Click **OK** to continue or **Cancel** to exit.
8. The system splits the record into the number of records entered in the Split Records window. The split records are available for selection in the grid.

IMPORT FROM EXCEL

Overview

Rather than Generate Records on each grid, the option to import from Excel is available for the Staff Assignments and Class Size Grids.

Import Staff Assignments

To import from Excel on the Staff Assignments grid, first setup the Excel file as follows.

ITEM	DESCRIPTION
Employee ID	Must match the employee ID defined in Actions > Report Defaults Setup as the Employee Staff Identifier.
Employee Name	Must match the employee name defined in Payroll > Employees > Employee Maintenance.
School Institution ID	Set the default format to ‘text’ for this field.
School Section Identifier	Set the default format to ‘text’ for this field.
School Course ID	Set the default format to ‘text’ for this field.
Team Teaching Flag	Y or N in the file. Defaults as unmarked.
Teacher License Flag	Y or N in the file. Defaults as unmarked.
Instructional Unit ID	Set the default format to ‘text’ for this field.
District Institution ID	Up to a 10 digit Institution Identification number. Set the default format to ‘text’ for this field.
Class Instructional Hours	Numeric value only under 4 digits.
Full Time Schedule Hours	Numeric value under 4 digits or blank as applicable.
Alternate License Last Name	First 50 characters import.
Qualification Comment	First 200 characters import.
Emergency/Provisional Determination Flag	Blank or valid values.
Out of Field Determination Flag	Blank or valid values.
Preliminary Determination Flag	Blank or valid values.
Class Instructional Full Time Equivalency	Numeric value under 3 digits or blank as applicable.

Activity *(Required)*

Import from Excel File

1. After setting up the Excel file, enter the appropriate data into the file.
2. Choose the **Staff Assignments** tab.

3. From the Actions menu, select **Import File**. The Staff Collections Assignments Excel Import window displays.
4. Complete the items in the window with the corresponding column name from the Excel spreadsheet.
5. If the file does not have a corresponding column in the spreadsheet, leave the box blank.
6. Mark the **File Includes Header Line** checkbox if the Excel spreadsheet has a header line.
7. Complete the File Location by either entering the location or by clicking the **Browse (...)** button and searching for the Excel file.
8. In the **Name** field, enter a name for the worksheet.
9. Click **OK** to import the Excel file or **Cancel** to exit without importing the file.
10. Click **OK** to the message stating the import was successful. The records from the spreadsheet display in the grid on the Staff Assignments tab.

Import Class Size

To import from Excel on the Staff Assignments grid, first setup the Excel file as follows.

ITEM	DESCRIPTION
Employee ID	Must match the employee ID defined in Actions > Report Defaults. Setup as the Employee Staff Identifier.
District Institution ID	Up to a 10 digit Institution Identification number. Set the default format to ‘text’ for this field.
School Institution ID	Set the default format to ‘text’ for this field.
Classroom Identifier	Set the default format to ‘text’ for this field.
Class Period	Set the default format to ‘text’ for this field.
Course Code	Set the default format to a custom format of 0000. This requires the leading zero to display.
Grade Level	Set the default format to ‘text’ for this field.
Class Size Count Male	Set the default format to ‘text’ for this field.
Class Size Count Female	Set the default format to ‘text’ for this field.
Classroom Type Code	Set the default format to a custom format of 0000. This requires the leading zero to display.

ITEM	DESCRIPTION
Web Only Flag	Y or N in the file.
Employee Name	Optional. Set the default format to 'text' for this field.

Activity *(Required)*

Import Class Size from Excel

Payroll/Human Resources > Reports > OR Staff Collections Report

1. After setting up the Excel file, enter the appropriate data into the file.
2. Choose the **Class Size** tab.
3. From the Actions, select **Import from Excel**. The Staff Collections Class Size Excel Import window displays.
4. Complete the items in the window with the corresponding column name from the Excel spreadsheet.
5. If the file does not have a corresponding column in the spreadsheet, leave the box blank.
6. Mark the **File Includes Header Line** checkbox if the Excel spreadsheet has a header line.
7. Complete the File Location by either typing the location or by clicking the ellipse button to browse to the location of the Excel file.
8. Type the name of the worksheet.
9. Click **OK** to import the Excel file or **Cancel** to exit without importing the file.
10. Click **OK** to the message stating the import was successful. The records from the spreadsheet display in the grid in the Class Size tab.

CREATE REPORT

Overview

Once records have been generated and edited, the reports can be run.

Activity *(Required)*

Create Report

1. From the Actions menu, select **Reports**. The system displays the Reports window.

2. Mark the checkbox in the Report column or Warning File to print written reports. Options are the **USID Report; Staff Position Report; Staff Position Report Warning File; Staff Assignment Report; Staff Assignment Warning File;** and **the Class Size Report**.
3. Electronic Files are available for upload to the State for all reports. The electronic files meet the required state standards.
4. In the **Destination Path** field, enter the selected path or click the **Browse (...)** button to navigate to the destination location.
5. This is the location the mag media files are saved for later retrieval. This is a required field whether a mag media file is being created.
6. Click **OK** to print the reports or **Cancel** to exit without printing the reports.
7. The system prepares the report(s) and displays it in the Report Viewer.
8. To create a mag media file, select **Reports** from the Actions menu. The system displays the Reports window.
9. Mark the **Electronic File** checkbox as applicable. Electronic files are saved as CSV.
10. The Report Name field becomes available.
11. Select the report from the dropdown.
12. Click **OK** to create the Mag Media File (Electronic File) or **Cancel** to exit without creating the file. A message displays asking to enter a name for the new file. Do not include the path or the extension.
13. Type the mag media report name in the field.
14. Click **OK** to create the file or **Cancel** to exit without creating the file.
15. The Positions File Complete window displays informing stating the file has been generated. Click **OK**.
16. The file is saved in the location identified in the Destination Path.
17. The Warning Reports indicate employee records which do not have all the required criteria entered to upload successfully to the State. For example, an employee with a Position Code of 36 requires a Position Comment in order to upload successfully.

STAFF POSITIONS GRID

Payroll/Human Resources > Reports > OR Staff Collections Report

Overview

The Staff Collections Report consists of 3 tabs: Staff Positions, Staff Assignments and Class Size. Information in the grids can be used to review data quickly on an individual without running a report. The following is a summary of the Staff Positions grid.

ITEM	DESCRIPTION
Employee ID	This is either the Employee ID or the User Defined ID from Payroll > Employees > Employee Maintenance as defined in the Report Setup window.
Name	Name pulls from Payroll > Employees > Employee Maintenance.
SSN	SSN pulls from Payroll > Employees > Employee Maintenance.
Primary Job Title	Primary Job Title pulls from Payroll > Employees > Employee Maintenance. If the grid is populated using Actions> Import From Excel, the Primary Job Title field is blank. This is used for filtering purposes only.
Employee Category	The Employee Category pulls from the Employee Category field in Payroll > Employees > Employee Maintenance. This is used for filtering purposes only.
Position Description	Position Description is pulled from Payroll > Employees > Employee Positions and Pay. (Position descriptions are setup in Payroll > Master Positions > Pay Descriptions.) If the grid is populated using Actions > Import From Excel, the Position Description field is blank. This is used for filtering purposes only.
Assigned Institution	This is the Institution ID associated with the DAC assigned to this record in Payroll > Employees > Employee Positions & Pay. The crosswalk table defined in Setup defines the Institution ID associated with each DAC.

ITEM	DESCRIPTION
Position Code	The Position Code comes from the State Code field assigned to this record in Payroll > Employees > Employee Positions & Pay.
Position Comment	Position Comment is a comment describing services rendered by the staff member. It generates blank into the grid. Modify the record by double-clicking the record to make changes.
FTE	FTE comes from the FTE field assigned to the position in Payroll > Employees > Employee Positions and Pay if 1 Position Per Line in Actions > Report Defaults Setup is marked. If Roll Positions in Actions > Report Defaults Setup is marked, FTE is the sum of the FTE from the positions rolled together.
Salary	Salary is the Position Amount assigned to this record in Payroll > Employees > Employee Positions and Pay. It does not include extra duty pay, stipend amounts, or other compensation above and beyond the amount of the basic contract. If 1 Position Per Line in Actions > Report Defaults Setup is marked, the Salary is the Amount from Payroll > Employees > Employee Positions and Pay. If Roll Positions in Actions > Report Defaults Setup is marked, the Salary is the sum of Amounts of the rolled positions.
Rate	The Rate is the Hourly Rate assigned to this record in Payroll > Employees > Employee Positions and Pay. If 1 Position Per Line in Actions > Report Defaults Setup is marked, the Rate is the Hourly Rate from Payroll > Employees > Employee Positions and Pay. If Roll Positions in Actions > Report Defaults Setup is marked, the Rate is the average of Hourly Rate of the rolled positions.

ITEM	DESCRIPTION
Pers Pickup	PERS Pickup is a flag indicating the employer pays the employee's share of the PERS (Public Employees' Retirement System) contribution for this position. PERS Pickup populates into the grid as 'Y' for all employees assigned a deduction with a deduction type of 'Retirement - OR Employer Contr. For Employee'. Modify the value by double-clicking on a record to update or by going to Actions > Mass Update.
Contact Length	Contract Length equals the Position Days from Payroll > Employees > Employee Positions and Pay.
Full Contract Length	Full Contract Length equals the total work days from the Work Calendar assigned to the Position in Payroll > Employees > Employee Positions and Pay
Last State of Residence	The Last State of Residence code is only populated for employees when this is their first year of service with the district. (Years in District = 0) This is populated from the User Defined field in Employee Maintenance tied to this record or by manually editing the record.
Level of Education	The Level of Education Code comes from the User Defined Field designated as the Level of Education code from Payroll > Employees > Employee Positions and Pay. If the district has Human Resources and is utilizing the Level of Staff Education crosswalk as defined in Setup, this is populated based on the highest degree assigned to the employee in Human Resources > Employee Demographics > Employee Education. The Level of Education code indicates the highest level of education attained by the staff member. If 1 Position Per Line in Actions > Report Defaults Setup is marked, the Level of Education is the value from the Level of Staff Education Code in Payroll > Employees > Employee Positions and Pay > User Defined Fields tab. If Roll Positions in Actions > Report Defaults Setup is marked, the value for Level of Education pulls from the position with the highest value in the Position Amount.

ITEM	DESCRIPTION
Termination Code	Termination Code is populated from the Termination Code in Payroll > Employees > Employee Maintenance. It is not required to enter a Termination Code of '00' for employees with no change in status.
Years In District	Years in District is populated from the This Employer field on the dates/demographics tab in Payroll > Employees > Employee Maintenance. Years in District is the number of years the staff member has been employed with the district under Oregon licensure, cumulatively in any position. This number does not include the current year. New hires are represented by a '0.' Any service of a half-year or more is counted as 1 full year, excluding the current year.
State Reportable	State Reportable pulls from the State Reportable field on the dates/demographics tab in Payroll > Employees > Employee Maintenance.
Outside of Oregon	Outside of Oregon pulls from the Other Employers field on the dates/demographics tab in Payroll > Employees > Employee Maintenance.
Classification	Classification pulls from the Cert/Class value in the employee's position in Payroll > Employees > Employee Position and Pay. This is used for filtering purposes only.
Low Grade Responsibility	This is populated from the User Defined field defined as Low Grade Responsibility in Payroll > Employees > Employee Positions and Pay. If 1 Position Per Line in Actions > Report Defaults Setup is marked, the Low Grade Responsibility is the value from the Lowest Grade Responsibility from Payroll > Employees > Employee Positions and Pay > User Defined field. If Roll Positions in Actions > Report Defaults Setup is marked, the value for Low Grade responsibility pulls from the Position with the lowest value in Position Amount in Payroll > Employees > Employee Positions and Pay.

ITEM	DESCRIPTION
High Grade Responsibility	This is populated from the User Defined field defined as High Grade Responsibility in Payroll > Employees > Employee Positions and Pay. If 1 Position Per Line in Actions > Report Defaults Setup is marked, the High Grade Responsibility is the value from the Highest Grade Responsibility from Payroll > Employees > Employee Positions and Pay > User Defined field. If Roll Positions in Actions > Report Defaults Setup is marked, the value for High Grade Responsibility pulls from the Position with the highest value in Position Amount in Payroll > Employees > Employee Positions and Pay.
Special Education Age Group Code	This populates from the User Defined field defined as Special Education Age Group Code in Payroll > Employees > Employee Positions and Pay. If Roll Positions in Actions > Report Defaults Setup is marked, the value for Special Education Age Group Code pulls from the position with the highest value in the Position Amount. Modify the column by double-clicking on a record to populate or update via Actions > Mass Update. Special Education Age Group Code could have been updated if the data is imported from Excel via Actions > Import From Excel.
License Flag	This is populated from the User Defined field defined as License Flag in Payroll > Employees > Employee Positions and Pay. If Roll Positions in Actions > Report Defaults Setup is marked, the value for License Flag pulls from the Position with the highest value in Position Amount.

ITEM	DESCRIPTION
Highly Qualified Paraprofessional	This pulls from the User Defined field defined as Highly Qualified Paraprofessional in Payroll > Employees > Employee Positions and Pay. If 1 Position Per Line in Actions > Report Defaults Setup is marked, the Highly Qualified Paraprofessional flag from Payroll > Employees > Employee Positions and Pay > User Defined field. If Roll Positions in Actions > Report Defaults Setup is marked, the Highly Qualified Paraprofessional flag pulls from the Position with the highest value in Position Amount in Payroll > Employees > Employee Positions and Pay.
Title I – A Flag	This is populated with a 'Y' if any of the position funding records matches the Title I-A account masks as entered in setup. If Roll Positions in Actions > Report Defaults Setup is marked, the value for the Title I-A Flag pulls from the Position with the highest value in Position Amount in Payroll > Employees > Employee Positions and Pay.
Title II – A Flag	This is populated with a 'Y' if any of the position funding records matches the Title II-A account masks as entered in setup. If 1 Position Per Line in Actions > Report Defaults Setup is marked, the Title II-A Flag is the value from the Title I-A Flag from Payroll > Employees > Employee Positions and Pay > User Defined field. If Roll Positions in Actions > Report Defaults Setup is marked, the value for the Title II-A Flag pulls from the Position with the highest value in Position Amount in Payroll > Employees > Employee Positions and Pay.
USID	USID is the State ID from Payroll > Employees > Employee Maintenance.
TSPC ID	The TSPC ID is the Teacher Standards and Practices Commission assigned account identifier and is pulled from the State Data tab in Payroll > Employees > Employee Maintenance.
Report Date	The Report Date is the date chosen during Actions > Generate Records.
Report Description	The Report Description is the Report Name given during Actions > Generate Records.

ITEM	DESCRIPTION
Language of Origin	This is populated with the language assigned in HR > Configuration Education/Credentials > Languages.

THE STAFF ASSIGNMENTS GRID

Payroll/Human Resources > Reports > OR Staff Collections Report

Overview

The Staff Collections Report consists of 3 tabs: Staff Positions, Staff Assignments and Class Size. Information in the grids can be used to review data quickly on an individual without running a report. The following is a summary of the Staff Assignments grid.

ITEN	DESCRIPTION
Employee ID	This is either the Employee ID or the User Defined ID from Payroll > Employees > Employee Maintenance as defined in the Report Setup window.
Name	Name pulls from Payroll > Employees > Employee Maintenance.
SSN	SSN pulls from Payroll > Employees > Employee Maintenance.
Primary Job Title	Primary Job Title pulls from Payroll > Employees > Employee Maintenance. If the grid is populated via Actions > Import From Excel, the Primary Job Title field is blank. This is used for filtering purposes only.
Position Description	Position Description is pulled from Payroll > Employees > Employee Positions and Pay. (Position descriptions are setup in Payroll > Master Positions > Pay Descriptions.) If the grid is populated via Actions > Import From Excel, the Position Description field is blank. This is used for filtering purposes only.
School Institution ID	This is the Institution ID associated with the DAC assigned to this record in Payroll > Employees > Employee Positions & Pay. The crosswalk table defined in Setup defines the Institution ID associated with each DAC.

ITEN	DESCRIPTION
School Section Identifier	This is populated by double-clicking on the record and typing in the School Section Identifier information. This is a local identifier assigned by the District used to uniquely identify the section. School Section Identifier could have been updated if the data is imported from Excel via Actions > Import from Excel.
School Course ID	School Course ID is populated by double-clicking on the record and typing in the District Course ID information. This a local identifier assigned by the District used to uniquely identify the course. District Course ID could have been updated if the data was imported from Excel via Actions > Import From Excel.
Course Code	If the grid is populated via Actions > Generate Records, Course Code is blank. Modify the column by double-clicking on the record to populate or via Actions > Mass Update. Course Code could have been updated if the data was imported from Excel via Actions > Import From Excel.
Instructional Unit	This is populated by double-clicking on the record and typing in the Instructional Unit information. This is a local identifier assigned by the School and used to uniquely identify the unit.
Course Start Date	If the grid is populated via Actions > Generate Records, Course Start Date equals the Position Start Date. Course Start Date could have been updated if the data was imported from Excel via Actions > Import From Excel.
HQ Status Determination	If the grid is populated via Actions > Generate Records, HQ Status Determination is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. HQ Status Determination could have been updated if the data was imported from Excel via Actions > Import Data.

ITEN	DESCRIPTION
HQ Status Comment	If the grid is populated via Actions > Generate Records, the HQ Status Comment is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. HQ Status Comment could have been update if the data was imported from Excel via Actions > Import from Excel.
Reason Not HQ	If the grid is populated via Actions > Generate Records, the Reason Not HQ is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Reason Not HQ could have been updated if the data was imported from Excel via Actions > Import from Excel.
HW Plan Comment	If the grid is populated via Actions > Generate Records, the HQ Plan Comment is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. HQ Plan Comments could have been updated if the data was imported from Excel via Actions > Import from Excel.
USID	USID is the State ID from Payroll > Employees > Employee Maintenance.
TSPC ID	The TSPC ID is the Teacher Standards and Practices Commission assigned account identifier and is pulled from the State Data tab in Payroll > Employees > Employee Maintenance.
Team Teaching Flag	The Team Teaching Flag is populated into the grid as unchecked. In order to change the flag, double-click on the record to edit or filter on the grid and mass update the records. The Team Teaching Flag could have been updated if you imported the data from Excel via Actions > Import from Excel.
TSPCHQ Flag	The TSPCHQ Flag is populated into the grid as unchecked. In order to change the flag, double-click on the record to edit or filter on the grid and mass update the records. The TSPCHQ Flag could have been updated if data was imported from Excel via Actions > Import from Excel.

ITEN	DESCRIPTION
Teacher License Flag	The Teacher License Flag indicates this teacher is licensed, or registered, with TSPC (Teacher Standards and Practices Commission). If the grid is populated via Actions > Generate Records, the Teacher License Flag is not marked. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. The Teacher License Flag could have been updated if the data was imported from Excel via Actions > Import from Excel.
Report date	The Report Date is the date selected during Actions > Generate Records.
Report Description	The Report Description is the Report Name entered in Actions > Generate Records.
Low Grade Code	This is populated from what is displayed in Payroll > Employees > Employee Positions and Pay > State Data tab.
High Grade Code	This is populated from what is displayed in Payroll > Employees > Employee Positions and Pay > State Data tab.
Special Education	If checked, identifies the position as a Special Education position.
Distance Learning	If checked, identifies the position as a Distance Learning position.

THE CLASS SIZE GRID

Payroll/Human Resources > Reports > OR Staff Collections Report

Overview

The Staff Collections Report consists of 3 tabs: Staff Positions, Staff Assignments and Class Size. Information in the grids can be used to review data quickly on an individual without running a report. The following is a summary of the Class Size grid.

ITEMS	DESCRIPTION
Employee ID	This is either the Employee ID or the User Defined ID from Payroll > Employees > Employee Maintenance as defined in the Report Setup window.
Name	Name pulls from Payroll > Employees > Employee Maintenance.

ITEMS	DESCRIPTION
School Institution ID	This is the Institution ID associated with the DAC assigned to this record in Payroll > Employees > Employee Positions & Pay. The crosswalk table defined in Setup defines the Institution ID associated with each DAC.
Class Room Identifier	If the grid is populated via Actions > Generate Records, Class Room Identifier is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Class Room Identifier could have been update if the data was imported from Excel via Actions > Import From Excel.
Class Period	If the grid was populated via Actions > Generate Records, Class Period is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Class Period could have been updated if the data was imported from Excel via Actions > Import From Excel.
Course Code	If the grid is populated via Actions > Generate Records, Course Code is blank. Modify the column by double-clicking on the record to populate or via Actions > Mass Update. Course Code could have been updated if the data was imported from Excel via Actions > Import From Excel.
Grade Level Code	If the grid is populated via Actions > Generate Records, Grade Level Code is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Grade Level Code could have been updated if the data was imported from Excel via Actions > Import From Excel.
Class Size count – Male	If the grid is populated via Actions > Generate Records, Class Size Count – Male is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Class Size Count - Male could have been updated if the data was imported from Excel via Actions > Import From Excel.

ITEMS	DESCRIPTION
Class Size Count – Female	If the grid is populated via Actions > Generate Records, Class Size Count – Female is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Class Size Count - Female could have been updated if the data was imported Excel via Actions > Import From Excel.
Class Room Type	If the grid is populated via Actions > Generate Records, Class Room Type is blank. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Class Room Type could have been updated if the data was imported from Excel via Actions > Import From Excel.
Web Only Flag	If the grid is populated via Actions > Generate Records, Web Only Flag is unchecked. Modify the column by double-clicking on a record to populate or via Actions > Mass Update. Web Only Flag could have been updated if the data was imported from Excel via Actions > Import From Excel.
Report Date	The Report Date is populated during Actions > Generate Records by selecting the date.
Report Description	The Report Description is the name given to the report during Actions > Generate Records.