

Steps to Add and Link Personnel Records

Personnel records include a **Registration, Functional Role, Employment, and Professional Status** record. You can assign teachers to classes by adding a Functional Role to their Personnel record. When you link a teacher's Personnel record with their User record, teachers can access their class and student information. This is particularly important if you plan to use the [TE Teacher Portal](#).

Personnel Registration

Step	Screen	Description
1.		<ul style="list-style-type: none"> • From the Menu bar. <ul style="list-style-type: none"> ○ Select Personnel. <ul style="list-style-type: none"> ▪ Click Registration.
2.		<ul style="list-style-type: none"> • To add a new Personnel record, <ul style="list-style-type: none"> ○ Click Registration.
3.		<ul style="list-style-type: none"> • A tabbed page opens to the list of Personnel records in your online account. • From the Toolbar at top left of the list, <ul style="list-style-type: none"> ○ Click New.

Step	Screen	Description
4.		<ul style="list-style-type: none"> When a User record exists in your online account, <ul style="list-style-type: none"> Check Link with existing user.
5.		<ul style="list-style-type: none"> Click the Container field down-arrow. <ul style="list-style-type: none"> Select the Agency level (recommended) Or Site level.
6.		<ul style="list-style-type: none"> You have three options to select an existing User. Click the User field down-arrow, <ol style="list-style-type: none"> Type to Search for the User. Scroll to Select the User. Select [User] from Lister.
7.		<ul style="list-style-type: none"> When the User is located, <ul style="list-style-type: none"> Click on the User to select.

Step	Screen	Description
8.		<ul style="list-style-type: none"> • Personnel Information fields auto-populate after selecting and linking the User. <ul style="list-style-type: none"> ○ Enter an Agency Personnel ID.
9.		<ul style="list-style-type: none"> • From the Toolbar at top, <ul style="list-style-type: none"> ○ Click Save.
10.		<ul style="list-style-type: none"> • The new Personnel record page splits automatically with <ul style="list-style-type: none"> ○ Personnel Information at right ○ Navigator at left to add and access Personnel records. • Click the Red X Box on the Registration tab and return to the Personnel record.

Functional Roles

Functional Roles identify personnel involved in the administration and teaching of adult learners. Personnel may have more than one Functional Role within the agency. Adding a Functional Role for a teacher gives them access to class and student information in TE.

Step	Screen	Description
1.		<ul style="list-style-type: none"> • From Navigator at left of the Personnel Information record, <ul style="list-style-type: none"> ○ Click Functional Roles. • To add a Functional Role for the Personnel member, <ul style="list-style-type: none"> ○ Click New at right.

Step	Screen	Description
2.	<p>Functional Role Information Container: 4908 - Rolling Hills Adult School (RHAS) Class Description: Personnel: 43 - Teacher New User</p> <p>Select Personnel Personnel: Container: 4908 - Rolling Hills Adult School (RHAS) Personnel: 43 - Teacher New User</p> <p>Select container/associations for role Container: Container: 4908 - Rolling Hills Adult School (RHAS) Class Definition: No selection Special Program: No selection</p>	<ul style="list-style-type: none"> A new tab opens to input Functional Role Information in three sections. <ol style="list-style-type: none"> Personnel information, Container to associate the role. Role Identification. Personnel and Container fields auto-populate when using the Navigator to add records.
3.	<p>Select container/associations for role Container: Container: 4908 - Rolling Hills Adult School Class Definition: [Type here to search...] Special Program: 001 ESL - Intermediate Low 002 ESL - Intermediate High 003 ESL - Intermediate High 005 ESL Intermediate Low - Distance Learning 1 ABE 1001 ABE Intermediate 1002 ABE - CEC 110 Low Beginning 1106 ESL - Beginning 111 Intermediate High</p> <p>Role Identification</p>	<ul style="list-style-type: none"> To link the Personnel member with a Class, <ul style="list-style-type: none"> Click the Class Definition field down-arrow and <ul style="list-style-type: none"> Type to search. Scroll to select. Select from Lister Select the Class.
4.	<p>Functional Role Information Container: 4908 - Rolling Hills Adult School (RHAS) Class Description: 1 - Low Intermediate ABE Personnel: 43 - Teacher New User</p> <p>Select Personnel Personnel: Container: 4908 - Rolling Hills Adult School (RHAS) Personnel: 43 - Teacher New User</p> <p>Select container/associations for role Container: Container: 4908 - Rolling Hills Adult School (RHAS) Class Definition: 1 - Low Intermediate ABE Special Program: No selection</p>	<ul style="list-style-type: none"> If the Personnel member is <i>not</i> a teacher, <ul style="list-style-type: none"> Leave “No selection” in the Class Definition field. Special Program will auto-populate if defined for the selected class.
5.	<p>Role Identification</p> <p>Functional Role: <input type="radio"/> Administrator <input type="radio"/> Scorer <input checked="" type="radio"/> Teacher</p> <p>Start Date: 7/1/2017 End Date:</p>	<ul style="list-style-type: none"> For Role Identification, <ul style="list-style-type: none"> Select Administrator, Scorer, or Teacher. Select the Start Date when the role begins. Leave End Date empty if the role will continue across program years.

Step	Screen	Description
6.		<ul style="list-style-type: none"> From the Toolbar at top, <ul style="list-style-type: none"> Click Save.
7.		<ul style="list-style-type: none"> Return to the Personnel record. <ul style="list-style-type: none"> Click the Red X Box on the Functional Role tab and return to the Personnel record.
8.		<ul style="list-style-type: none"> The Functional Role record is now listed with the Personnel record. <p><i>Note!</i> Personnel may have more than one Functional Role at the agency.</p>

Employment Records

The next record to add for **Personnel** is information about their employment. **Personnel** may have more than one **Employment Record** to identify different types of employment within the agency.

Professional Status

The last record to add for **Personnel** is information about their professional status.

Import Personnel Records and Link with User Records

> Tools > **3rd Party Import Wizard**

Importing **Personnel Records** will automatically add and link with **User Records**.

To automatically assign **Functional Roles** for **Teachers**, first import **Personnel Data**. Then, import **Class Data** with Teacher IDs to automatically assign teachers to classes – i.e., automatically add a **Functional Role** for the teacher.

- See [TOPSpro Enterprise Data Exchange Specifications](#) for information about importing **Personnel** records.
 - **IMPORT: PERS – Personnel and User Data**
- A **TE WIOA Import Templates** folder is available from the CASAS website to help you populate your online account without manual data entry or 3rd Party Import.
 - Download: [TE WIOA Import Templates](#)

