eTests TOPSpro

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 <u>TE Teacher Portal</u>.

Personnel Registration

Step	Screen	Description
1.	View Organization Records Reports Tools Help AEBG Consortia Agencies Agencies Sites Classes Ites Classes Ites Classes Ites Classes Ites Classes Ites Registration Employment Records Forms Employment Records Functional Roles Professional Status Foressional Status Testing Stations Testing Sessions Testing Session Templates Tests in Progress	 From the Menu bar. Select Personnel. Click Registration.
2.	Organization Records Reports Tools Help Agencies Sites Classes Image: Classe	 To add a new Personnel record, Click Registration.
3.	TE View Organization Records Reports T Personnel X New 1908 - Rolling Hills Adult School (RHAS) Subsite Container A Personnel ID Y Y Y	 A tabbed page opens to the list of Personnel records in your online account. From the Toolbar at top left of the list, Click New.

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Step	Screen	Description
4.	 Personnel Information Select Container Link with existing user: User: Container: 4908 - 	 When a User record exists in your online account, Check Link with existing user.
5.	 Personnel Information Select Container User: 4908 - Rolling Hills Adult School (RHAS) User: 4908 - Rolling Hills Adult School (RHAS) O1 - RHAS: North Campus O2 - RHAS: South Campus O3 - RHAS: Sunrise Center O7 - RHAS: North City 	 Click the Container field down-arrow. Select the Agency level (recommended) Or Site level.
6.	View Organization Records Reports Tools Help Personnel New Personnel Personnel: ® Select Container User: User: <	 You have <u>three</u> options to select an existing User. Click the User field down-arrow, Type to Search for the User. Scroll to Select the User. Select [User] from Lister.
7.	View Organization Records Reports Tools Help Personnel New Personnel Personnel Personnel Image: Save Cancel Container Container: Image: Select Container Link with existing user: Container: User: Container: User: Container: User: Container: User: Container: User: Define: User: Container: User: Define: User: Define: User: Middle Title: Last Name:	When the User is located, O Click on the User to select.

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Step	Screen	Description
8.	Personnel Information Personnel Information Postainer Link with existing user: Container: 4908 - Rolling Hills Adult School (RHAS) V User: newuser@agency.org - Teacher New User	• Personnel Information fields auto-populate after selecting and linking the User .
	Personnel Identification User Account: Inexuser Dagincy org Personnel ID: 43 Title: Teacher: Last Name: User Middle Name: First Name: New	 Enter an Agency Personnel ID.
9.	TE View Organization Records Report Personner New Personnel Image: Cancel Image: Canc	 From the Toolbar at top, Click Save.
10.	View Organization Records Reports Tools Help Personnel 43 - Mary Perkins Image: Concell of the second sec	 The new Personnel record page splits automatically with 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	Scr	een	Description
1.	TE View Organization R Personnel 43 - Teacher Navigator 4 Edit / Mow Functional Roles Personnel Employment Professional Status	ecords Reports Tools Help New User Personnel Information Functional Roles New Filter Columns Container Container T	 From Navigator at left of the Personnel Information record, Click Functional Roles. To add a Functional Role for the Personnel member, Click New at right.

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Step		Screen	Description
2.	 Functional Role Information Container: 4908 - Rolling Hills Class Description: Personnel: 43 - Teacher New for a second secon	ion Adult School (RHAS) User	 A new tab opens to input Functional Role Information in three sections. Personnel information, Container to associate the role. Role Identification. Personnel and Container fields autopopulate when using the Navigator to add records.
3.	Select container/associa Container: Container: Class Definition: Special Program: Role Identification	Ations for role	 To link the Personnel member with a Class, Click the Class Definition field down-arrow and Type to search. Scroll to select. Select from Lister Select the Class.
4.	Functional Role Information Container: 4908 - Rolling Hills Class Description: 1 - Low Intermedia Personnel: 43 - Teacher New Personnel: Container: Personnel: Container: Container: Container: Container: Container: Container: Container: Special Program:	ion Adult School (RHAS) Ate ABE User 4908 - Rolling Hills Adult School (RHAS) 43 - Teacher New User 43 - Teacher New User 4908 - Rolling Hills Adult School (RHAS) 4908 - Rolling Hills Adult School (RHAS) 1 - Low Intermediate ABE No selection	 If the Personnel member is <i>not</i> a teacher, Leave "No selection" in the Class Definition field. Special Program will auto-populate if defined for the selected class.
5.	Role Identifica Functional Role: Start Date: End Date:	Administrator Scorer Teacher 7/1/2017	 For Role Identification, 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.	View Organization Records Reports Tools Help Perso inel 43 - Mary Perkins New Functional Role X New Save Cancel Delete Duplicate No items Go To Persoinel Functional Role Information Container: 4908 - Rolling Hills Adult School (RHAS) Class Description: 113 - ESL Advanced - Distance Learning Personnel: 43 - Mary Perkins	 From the Toolbar at top, Click Save.
7.	View Organization Record: Reports Tools Help Personnel 43 - Mary Perkins: New Save Cancel Delete Delete Duplicate Functional Role Information Container: 4908 - Rolling Hills Adult School (RHAS) Class Description: 113 - ESL Advanced - Distance Learning Personnel: 43 - Mary Perkins Role Identification Facher Start Date: 7/1/2017 Related Class: 113 - ESL Advanced - Distance Learning	 Return to the Personnel record. Click the Red X Box on the Functional Role tab and return to the Personnel record.
8.	View Organization Records Reports Tools Help Personnel 43 - Mary Perkins Image: Container Image: Container Delete Duplice Edit / View Image: Container Personnel Information Container: 4908 - Rolling Hills Adult School (RHAS) Personnel Employment Professional Status Functional Roles Functional Roles New Image: Filter Image: Columns I	 The Functional Role record is now listed with the Personnel record. <i>Note!</i> Personnel may have more than one Functional Role at the agency.

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



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

To automatically assign **Functional Roles** for **Teachers**, <u>first</u> 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 <u>TOPSpro Enterprise Data Exchange Specifications</u> 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: <u>TE WIOA Import Templates</u>

