Louisiana Believes

CIS Training:

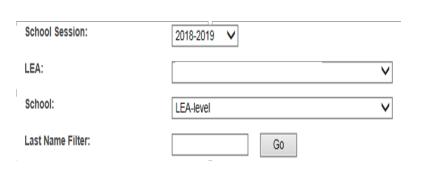
New/Transferring Personnel Procedures, Modifying Records, and Assigning Evaluators



This Training Includes:

- Who can modify records in CIS
- Using security to search for new personnel
- Using security to reactivate an account
- How to add brand new personnel
- How to transfer personnel from other LEAS
- How to setup evaluators
- How to assign evaluators to personnel

LEA vs Site Level Access



In CIS in the Employee tab, you will find 4 fields:

- School Session (2018-2019)
- LEA (3 digit Sponsor Code and Name)
- School (LEA Level or Site Level)
- Last name filter (only searchable field)

LEA Level employees – Can see data from all sites in the same sponsor code

Site Level employees – Can see only data/evaluate personnel from their specific site

Who can Modify Records in CIS?

The only User Group that can modify records in the CIS system is the LEA Administrator.

LEA Administrator – LEA administrators are found at the LEA Level and have the ability to add/edit/move/delete all user accounts for that LEA and serve as data manager/security coordinator. This position should be held by personnel that is not evaluated by Compass. Each LEA may have more than one LEA Administrator if desired.

* If you are a single site sponsor, this role should not be given to the a principal or teacher if possible as one account cannot serve multiple roles.

Using Security to Search for New Personnel

If you are the LEA Administrator, the first tab is the *Security* tab. Here you can search for people be either by first and last name or social security number.

Click *Go*. If the *Account List* is blank as shown to the right, this person is either new to CIS or may be listed under another name.

The full SSN is the best way to search for a person if available.



Using Security to Search for New Personnel

If your search provides a name, CIS will provide the following information:

- Name
- Current LEA
- Current Site
- SSN
- User Group
- Last Login
- Status of the Account

You will need the SSN and LEA code to transfer personnel.

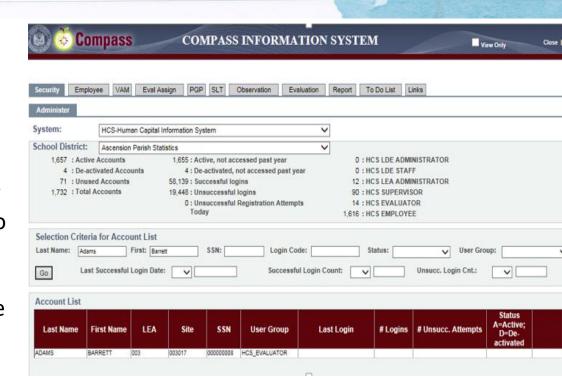


Using Security to Reactivate an Account

If the status of an account is A, the account has been activated and is working.

If the status of an account is D, the account is deactivated. Click the *reset* button on the right and ask the user to register as a new user again.

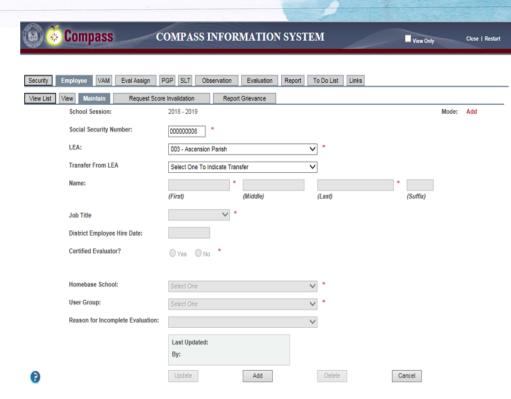
If the status of an account is *blank*, the user can register as a new user.



How to Add New Personnel

In the *Employee tab*, do not click anyone in *View List*, then click *Maintain*.

- 1. Enter the full SSN of the employee
- 2. Click Add



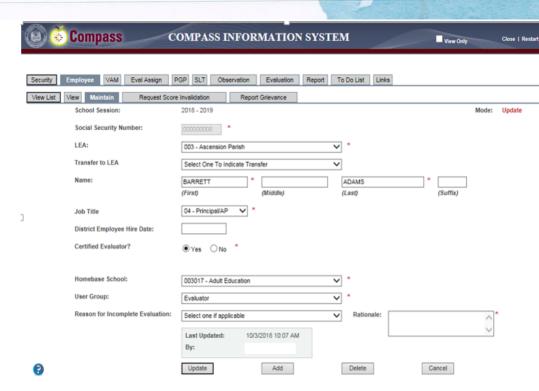
Enter Social Security Number, and if applicable, the Transfer From LEA and click 'Add'.

How to Add New Personnel

Once the SSN has been added to your LEA you will be able to add:

- Name
- Job Title
- Hire Date
- Certified Evaluator
- Home Base School
- User Group

Click *Update* once the required fields have been added.

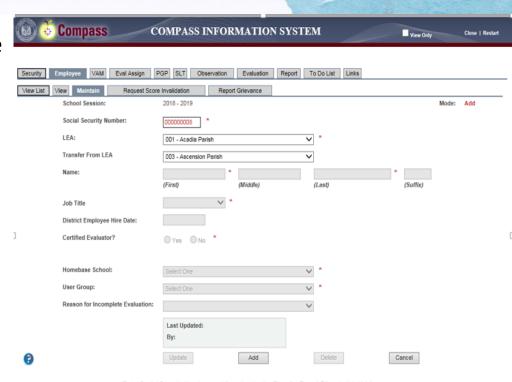


Employee records added to the database. To update record click Update. To add new employee click Add. To delete click Delete.

How to Transfer Personnel from other LEAS

Until the end of November, if you know the SSN and LEA of a person that you are currently employing you may move them without being released from the previous LEA.

- Go to Employee
- Go to Maintain
- Enter the SSN
- Select the correct LEA from Transfer from LEA
- Click Add



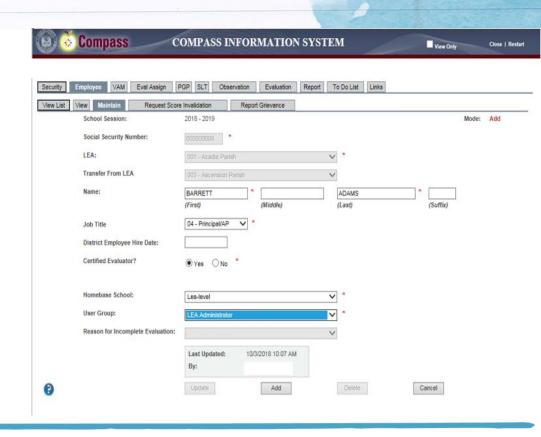
Enter Social Security Number, and if applicable, the Transfer From LEA and click 'Add'

How to Transfer Personnel from other LEAS

Once the employee is added by the SSN, you will be able to change:

- Job Title
- Certified Evaluator
- Home Based School
- User Group

Click *Add* once the employee has the correct updated information.



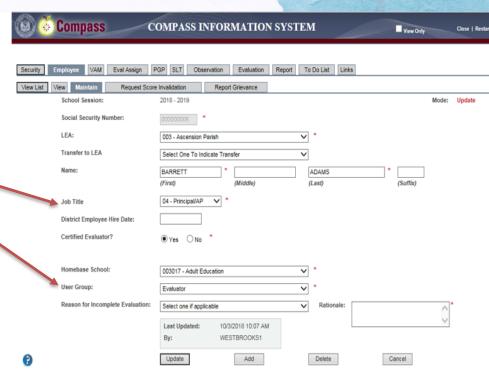
How to Setup Evaluators

Select the personnel that should be evaluator and go to *Maintain*.

Two things must be set to be an evaluator:

- Certified Evaluator must be Yes
- User Group must be Evaluator or Supervisor

Principals should be at their home-based school. Supervisors can be at the LEA level if they are going to evaluate principals from multiple sites.



Employee records added to the database. To update record click Update. To add new employee click Add. To delete click Delete.

How to Assign Evaluators to Personnel

Once all employees have been added to correct sites and evaluators are set, evaluators can be assigned to personnel.

Go to Eval Assign:

- Select either LEA or School
- Select the Evaluator
- Select the Employee Home Base School
- Select the Job Title
- Either manually select the employees to be assigned using the checkboxes or select Check All.
- Click Submit



CIS Personnel Reminders

- Double check the accuracy of site rosters before assigning evaluators.
- Accounts can only be in one LEA and one User Group at a time. If you manage multiple LEAs you will need multiple accounts.
- LEA Administrators are the only people capable of adding or modifying records.
- Please do not delete personnel unless you know that they are retired or have moved out of state with no immediate intention of returning to work in the state of Louisiana.

Resources

If you need assistance with Compass, please email us at Compass@la.gov

If you need help with accounts, please speak with your local LEA Administrator first.

If you are the LEA Administrator please include the following in your email:

- Name
- Sponsor/Site Code
- As much information to describe the problem as possible.