

Staff Assignments

- Staff Assignments within TNCompass
- Staff Assignments - Add Non-licensed Staff
- Staff Assignments - Data Management - Import Wizard

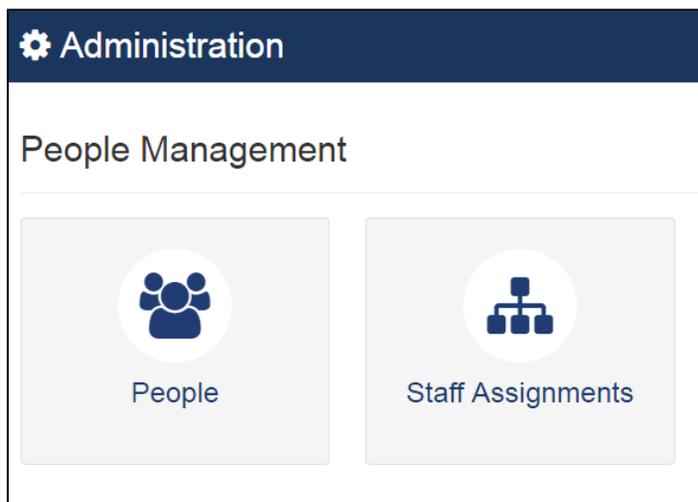
TNCompass delivers the capability to manage **Staff Assignments** which are accessible by authorized state-level administrators, regional administrators, and LEA permitted staff.

TNCompass has been designed to remove the need of Excel-based staff management; each LEA will have its staffing assignments from the previous academic year pre-loaded. Authorized administrators have the tools needed to make one-off changes in staff assignments within the TNCompass **Staff Assignments** tool.

The capability to make bulk staff assignment changes via an export/import process is supported for Administrators with the **Data Management - Import Wizard** tool. The **Data Management - Import Wizard** tool support export and download of bulk data, including Staff Assignment lists into an Excel format for modification, upload, validation, and processing into TNCompass.

Staff Assignments within TNCompass

- Click on the **Administration** tab and then
- Click on the **Staff Assignments** button,



- The **Staff Filters** window appears with a left side bar.
- Click to select **State, EPP, or Region**. Users are limited to **Staff Assignments** for his or her own authorized area. State administrators can perform assignments at the state level and regional administrators can perform staff assignment for their own region.
- The drop down list is modified based on the above selection.
- Select **Staff Status** button for **Active** or **Removed** staff.
- Enter **First Name, Last Name,** and/or **License Number** to perform a search.

Staff Assignments

Staff Filters

Academic Year
2015-2016

State EPP Region

State
Tennessee Department Of Educ: ▾

Staff Status
 Active Removed

First Name

Last Name

License Number

The following illustrates a *Region Selection* with a drop down list to select the appropriate region.

The screenshot displays the 'Staff Assignments' interface. At the top, there is a header with a tree icon and the text 'Staff Assignments'. Below this is a 'Staff Filters' section. Under 'Academic Year', the value '2015-2016' is shown. There are three filter buttons: 'State', 'EPP', and 'Region', with 'Region' being the active one. A 'Region' dropdown menu is open, showing a list of options. The current selection is 'Northwest Tennessee Core Regi'. The dropdown list includes: 'Select a Region', 'East Tennessee Core Regional Office', 'First Tennessee Core Regional Office', 'Memphis/ Shelby Core Regional Office', 'Mid Cumberland Core Regional Office', 'Northwest Tennessee Core Regional Office' (highlighted), 'South Central Core Regional Office', 'South East Tennessee Core Regional Office', 'South West/Memphis Core Regional Office', 'State Agencies/Special Schools', 'Unknown Region', and 'Upper Cumberland Core Regional Office'. Below the dropdown is the 'Staff Status' section with radio buttons for 'Active' (selected) and 'Removed'.

Selecting a region displays drop down lists for the LEAs within the region and then the schools within the selected LEA, as illustrated below.

The screenshot shows a sidebar with three main sections: Region, LEA, and School. At the top, there are three tabs: 'State', 'EPP', and 'Region', with 'Region' being the active tab. Below the tabs, the 'Region' section has a dropdown menu with 'South East Tennessee Core Reg' selected. The 'LEA (clear selection)' section has a dropdown menu with 'McMinn County' selected. The 'School' section has a dropdown menu with 'Select a School' as the header and a list of schools below: 'Select a School', 'Calhoun Elementary', 'Central High School', 'E K Baker Elementary', 'Englewood Elementary', 'McMinn High School', 'Mountain View Elementary' (highlighted with a blue bar and a mouse cursor), 'Niota Elementary', 'Riceville Elementary', 'Rogers Creek Elementary', and 'System-Wide School'. Below the school dropdown, there are two text input fields labeled 'Last Name' and 'License Number'.

The staff list for the selection(s) displays to the right of the **Staff Filter** sidebar.

The following staff list is fictitious and for illustration purposes only.

- Click the paper and pencil icon to edit the line entry.
- Click the trash can icon to delete the line entry.
- Click **Educator Profile** link to access the educator information.
- Click **Account** to access the educator account.
- Click **Add LEA Staff** button to add staff to the LEA.

10 | 20 | 50 | 100
← →

1-4 of 4
page 1 of 1

Location McMinn County (00540) Add LEA Staff

Status Active

License	Name	Role	
874101939	Observer (00540), Olivia	Observer Only (not evaluated)	✎ 🗑 Educator Profile Account
827394122	Resources (00540), Robert	HR Administrator	✎ 🗑 Educator Profile Account
802081634	Superintendent (00540), Susan	District Administrator	✎ 🗑 Educator Profile Account
829247731	Supervisor (00540), John	District Supervisor	✎ 🗑 Educator Profile Account

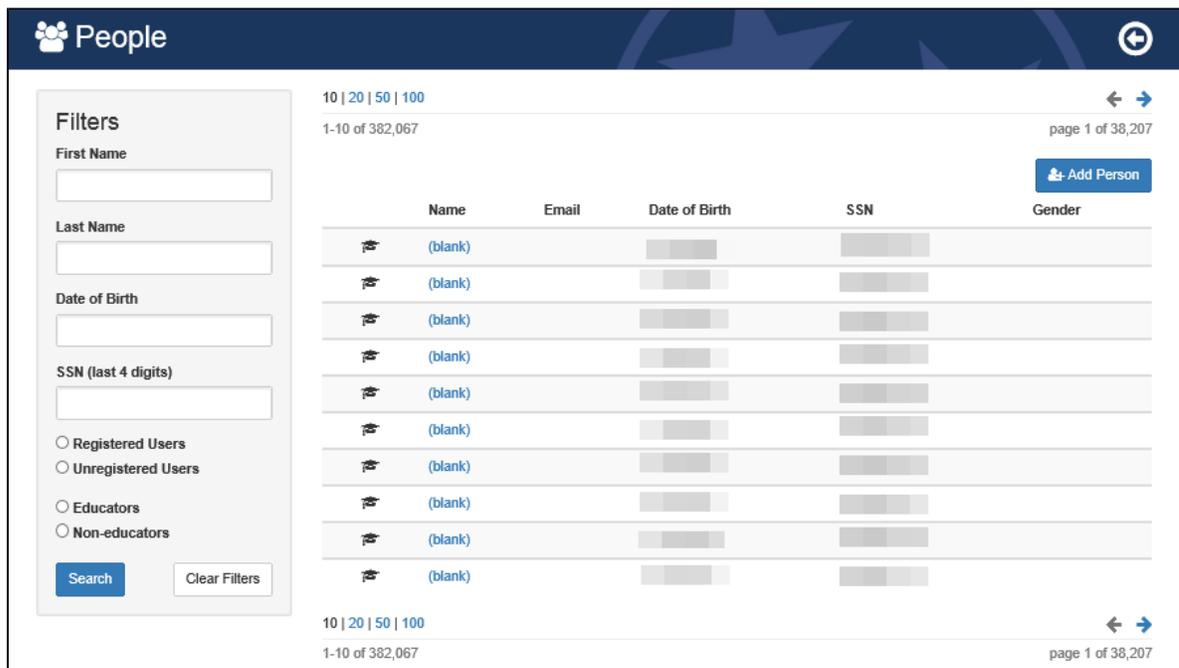
10 | 20 | 50 | 100
← →

1-4 of 4
page 1 of 1

Staff Assignments - Add Non-licensed Staff

i Non-licensed staff with a previous teaching license may already be in the system. Always search for the user before adding him or her to the system.

- Click **Administration** tab.
- Click **People** button.
- Search for the person to add using the **Filters** tools on the left side bar. Enter any or all of the criteria and click the **Search** button.
- If the person is found, click **Administration** and then **Staff Assignments** to add the person to your staff.
- If the person is not found, click **Add Person** button



When the **Add Person** pop-up window appears, enter the person's **First Name**, **Last Name**, and **Email** address.

The person will receive an email message to complete the registration process.

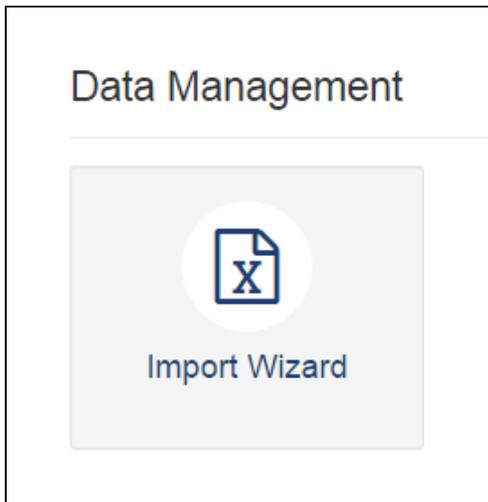
Once the person completes the registration process he or she can then be added to the staff, via the **Administration** and **Staff Assignments** process.

Staff Assignments - Data Management - Import Wizard

Bulk editing of staff assignments is efficiently accomplished using the **Data Management - Import Wizard**.

Access to bulk editing of staff assignment is limited to user authorized to perform this function for the specific locations.

- Click **Administration** tab,
- Click **Import Wizard** under the **Data Management** heading to open the wizard.
- The wizard walks the user through the process of selecting a location to export data and create a template, exporting the template to Excel, after modification is complete importing the template, validating the template, and processing the changes. The left hand sidebar tracks each step in the process.



- Select Location to generate a template. Click to select the Region, LEA, Schools for the template.
- When selections are complete click the **Generate Template** button.

 **Data Imports**



Import Wizard

 **Generate Template**

Select File & Import Data

Validate Data

Process Data

Staff Data Import

Please generate a file using the selections below.

Select location(s)

- Tennessee Department Of Education
 - Northwest Tennessee Core Regional Office (001)
 - Benton County (00030)
 - Benton Co Adult High School (0004)
 - Benton County Career / Technical Center (0009)
 - Big Sandy School (0010)
 - Briarwood School (0015)
 - Camden Elementary (0020)
 - Camden Central High School (0025)
 - Camden Jr High School (0027)
 - Holladay Elementary (0030)
 - System-Wide School (0000)
 - Carroll County (00090)
 - Carroll Co Tech Center (0007)
 - Carroll County Special Learning Center (0009)
 - System-Wide School (0000)
 - Hollow Rock - Bruceton (00092)

Generate Template

- When users already have a template, scroll to the bottom of the page and click to check the box labeled ***I already have a template.***
- Click ***Continue***

- The selected staff list is then exported to the users computer as an Excel file.
- Users already having a staff list do not have the file exported since he or she already has the file.
- Users can then modify the staff information in the Excel file.
- When all changes are made and checked for accuracy the file is ready to be imported into TNCompass for validation.
- On the wizard ***Staff Data Import*** window, note the wizard is tracking progress at ***Select File & Import Data.***
- Click ***Choose File***

- Select the updated file from the computer.
- Click **Continue**

Staff Data Import

Please select a file containing the Staff data.

Choose File TNCompass_Staff_ImportTemplate.xlsx

Cancel
Continue

- The file is uploaded and ready for validation in TNCompass.
- The wizard tracks the progress and shows **Validate Data**.
- Click the **Validate** button to validate the information.

x Data Imports ←

Import Wizard

Generate Template

Select File & Import Data

↻ **Validate Data**

Process Data

TNCompass_Staff_ImportTemplate.xlsx

Staff & Educators > Staff

Created 5/17/2016 3:23:27 PM (Central) by Gloria McMahon

This preview only shows the first ten records. There are 20 record(s) total.

District Id	School Id	License Number	First Name	Middle Name	Last Name	Email	Role
00094		827712527	Olivia		Observer (00094)	oliviaobserver00094@tncompass.org	Observer
00094		867723711	Robert		Resources (00094)	robertresources00094@tncompass.org	HR Admin
00094		889616490	Susan		Superintendent (00094)	susansuperintendent00094@tncompass.org	District Ad
00094		845381154	John		Supervisor (00094)	johnsupervisor00094@tncompass.org	District Su
00094	0000	824180892	Angela		Assistant (00094-0000)	ap00094-0000@tncompass.org	Assistant I
00094	0000	818352682	Homer		Observer (00094-0000)	ob00094-0000@tncompass.org	Observer
00094	0000	825172645	Paul		Principal (00094-0000)	principal00094-0000@tncompass.org	Principal
00094	0000	858451215	Mary		Teacher (00094-0000)	mary00094-0000@tncompass.org	Teacher
00094	0005	808699082	Angela		Assistant (00094-0005)	ap00094-0005@tncompass.org	Assistant I
00094	0005	812547497	Homer		Observer (00094-0005)	ob00094-0005@tncompass.org	Observer

Cancel Import
Validate

- If the data is not successfully validated, TNCompass will advise of errors. Correct the errors and validate the data again. Repeat if necessary.
- When the data has been successfully validated, TNCompass provides a message to advise **The import was validated . . .**
- Users can download the full report by clicking the **Download full report** button.
- The wizard again tracks the progress and shows **Process Data** on the left sidebar.
- The file is ready to be processed, click the **Process** button.

Import Wizard

- Generate Template
- Select File & Import Data
- Validate Data
- **Process Data**

i This import was **Validated** on 5/17/2016 3:24:35 PM (Central) by Gloria McMahon

Summary

- Staff Match (20)

Download full report

TNCompass_Staff_ImportTemplate.xlsx

Staff & Educators > Staff
 Created 5/17/2016 3:23:27 PM (Central) by Gloria McMahon
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00094		827712527	Olivia		Observer (00094)	oliviaobserver00094@tncompass.org	Observer
00094		887723711	Robert		Resources (00094)	robertresources00094@tncompass.org	HR Admin
00094		889816460	Susan		Superintendent (00094)	susansuperintendent00094@tncompass.org	District Ad
00094		845381154	John		Supervisor (00094)	johnsupervisor00094@tncompass.org	District Su
00094	0000	824160692	Angela		Assistant (00094-0000)	ap00094-0000@tncompass.org	Assistant i
00094	0000	818352982	Homer		Observer (00094-0000)	ob00094-0000@tncompass.org	Observer
00094	0000	825172845	Paul		Principal (00094-0000)	principal00094-0000@tncompass.org	Principal
00094	0000	858451215	Mary		Teacher (00094-0000)	mary00094-0000@tncompass.org	Teacher
00094	0005	808696082	Angela		Assistant (00094-0005)	ap00094-0005@tncompass.org	Assistant i
00094	0005	812547497	Homer		Observer (00094-0005)	ob00094-0005@tncompass.org	Observer

Cancel Import
Revalidate
Process

- When the file is successfully processed, TNCompass confirms the date and time processed.
- The wizard tracks the process as **Completed**.

x Data Imports ↶

Import Wizard

- Generate Template
- Select File & Import Data
- Validate Data
- Process Data
- **Completed**

✔ This import was **Processed** on 5/17/2016 3:25:31 PM (Central) by Gloria McMahon.

TNCompass_Staff_ImportTemplate.xlsx

Staff & Educators > Staff
 Created 5/17/2016 3:23:27 PM (Central) by Gloria McMahon
 This preview only shows the first ten records. There are 20 record(s) total.

District Id	School Id	License Number	First Name	Middle Name	Last Name	Email	Role
00094		827712527	Olivia		Observer (00094)	oliviaobserver00094@tncompass.org	Observer
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00094	0000	818352882	Homer		Observer (00094-0000)	ob00094-0000@tncompass.org	Observer
00094	0000	825172845	Paul		Principal (00094-0000)	principal00094-0000@tncompass.org	Principal
00094	0000	858451215	Mary		Teacher (00094-0000)	mary00094-0000@tncompass.org	Teacher
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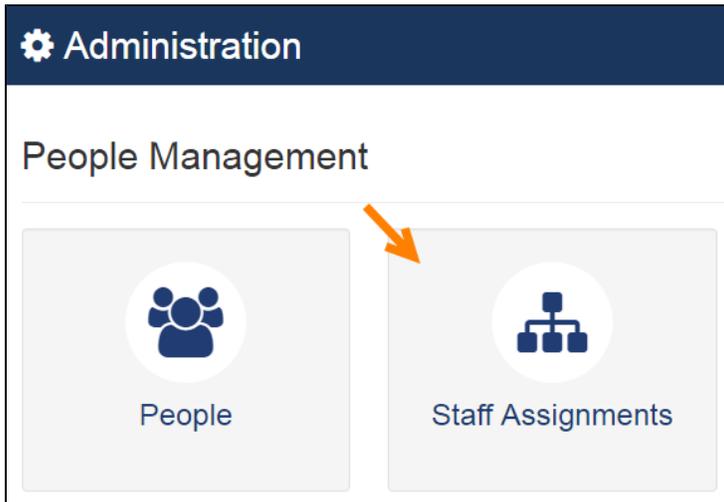
Start a new import
Download full report

Master Schools

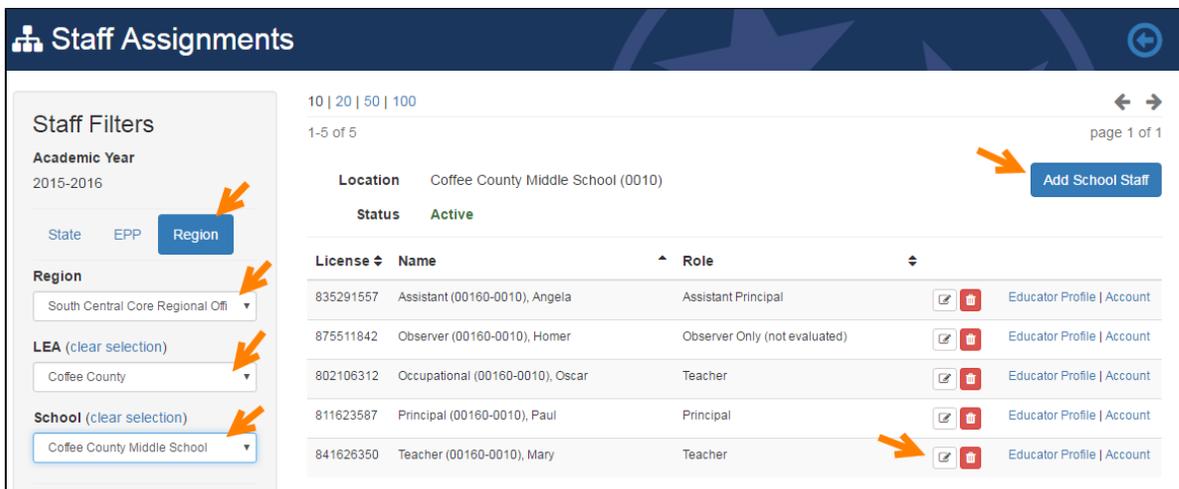
The purpose of this portion of the TNCompass user guide is to provide information about the ability to mark a school as a master school for growth/achievement measure scoring purposes.

To select a home (master) school to apply for growth measures, take the following action.

- Click on **Administration** tab.
- Click on **Staff Assignments**.



- Select region, LEA, and school to be set as the "master" school.
- If the teacher is not already on the list for this school, click on the **Add School Staff** wizard at the top right of the page.
- If the teacher is already on the staff list for the school, click on the pencil and paper icon to edit the teacher information.



- Add the new teacher and select the role or select a current teacher.
- When the information appears on the screen, click **Next**.

Edit Staff
✕

Selected Person

Mary Teacher (00160-0010)
Email: mary00160-0010@tncompass.org
Date of Birth: 12/31/1977
SSN: XXX-XX-6350
Location: Coffee County Middle School (0010) - Teacher

Select a Role

Teacher
 Teacher Evaluator
 Principal
 Assistant Principal
 Observer Only (not evaluated)



- Click to check the **Is Master Location** box to designate the location for use for the growth score.
- Click **Save Staff** to save the entries.

Edit Staff
✕

Please confirm your selections

Person: Mary Teacher (00160-0010)

Date of Birth: 12/31/1977

Location: Coffee County Middle School (0010)

Role: Teacher

Is Master Location:



 Your are changing the role of this person at this location.

Upload Observation Data from Third Party Vendors

 This feature is in development and will be introduced at a future date.

User Management

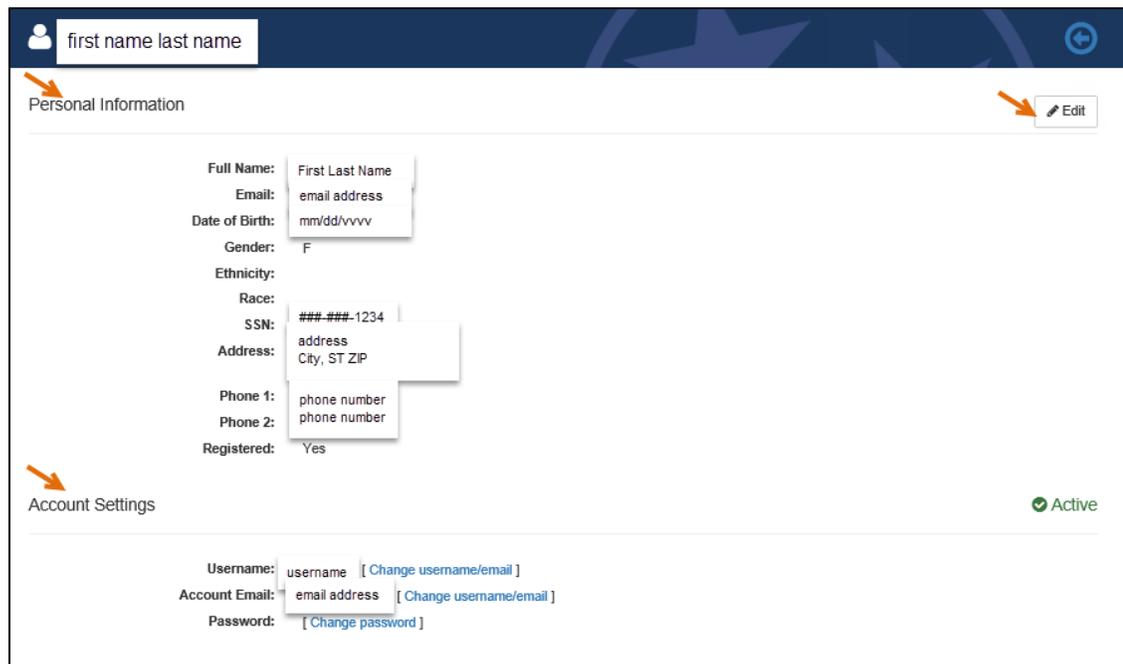
- User Management Permissions
- View User Information
- Add New User

Each user can view and edit his or her own **Personal Profile** information.

- Click on name in the upper right hand corner of the window and select **Account** or click on the **Account Information** button under **Application Quick Links** on the home page.



- When the **personal information** and **account information** page displays, the users name appears at the top of the window with **Personal Information** and **Account Settings** information displayed.
- Validate and edit information as needed; changes save automatically.
- Under **Account Settings** users can change their **Username**, **Account Email**, and/or **Password**. Click on the link following the appropriate **Account Settings** entry to make the changes.



first name last name

Personal Information Edit

Full Name: First Last Name
 Email: email address
 Date of Birth: mm/dd/yyyy
 Gender: F
 Ethnicity:
 Race:
 SSN: ###-##-1234
 Address: address
 City, ST ZIP
 Phone 1: phone number
 Phone 2: phone number
 Registered: Yes

Account Settings Active

Username: username [\[Change username/email \]](#)
 Account Email: email address [\[Change username/email \]](#)
 Password: [\[Change password \]](#)

User Management Permissions

Administrators with authorized permissions have tools to manage user information.

Permissions or authorization within TNCompass for user administration are as follows:

- State-level administrators can view all LEAs, educators, and non-licensed users in the state.
- Regional or LEA permitted staff can view the educators in their respective regions or districts.
- Principals can see all assistant principals and educators in their own schools.
- Assistant principals can see all educators in their own schools. Assistant principals cannot see principals or other assistant principals.
- Teachers will only be able to view their own record.

View User Information

User information is available to view for individual educators from the **Educator's** tab. Search for an Educator and when the specific educator information is found, click on the educator name to display the Educator Profile record.

User information is available through the **Administrator - Staff Assignment** functions within TNCompass.

- Select **Region, LEA, and School** to locate the user.
- Click on **Educator Profile** or **Account** to view user information.

Staff Assignments

10 | 20 | 50 | 100

1-5 of 5

page 1 of 1

Location Coffee County Middle School (0010)

Status Active

Add School Staff

License	Name	Role			
835291557	Assistant (00160-0010), Angela	Assistant Principal	✓	✖	Educator Profile Account
875511842	Observer (00160-0010), Homer	Observer Only (not evaluated)	✓	✖	Educator Profile Account
802106312	Occupational (00160-0010), Oscar	Teacher	✓	✖	Educator Profile Account
811623587	Principal (00160-0010), Paul	Principal	✓	✖	Educator Profile Account
841626350	Teacher (00160-0010), Mary	Teacher	✓	✖	Educator Profile Account

- Alternately, search for a specific user by **First Name**, **Last Name**, and/or **License Number**.

Staff Filters

Academic Year
2015-2016

State EPP Region

State
Tennessee Department Of Educa ▼

Staff Status
 Active Removed

First Name

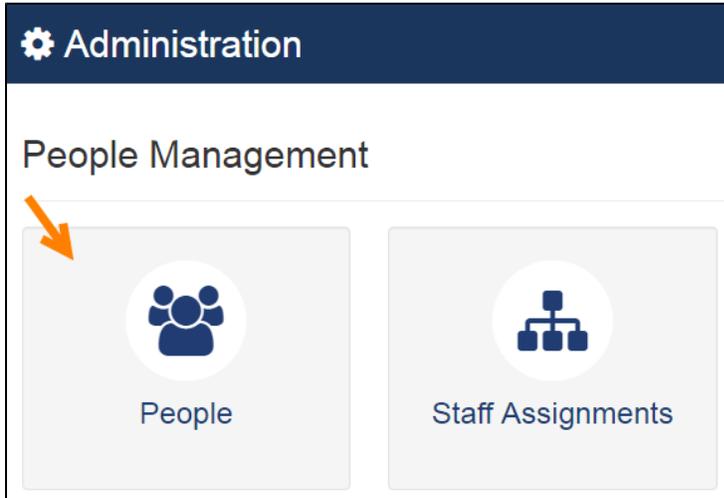
Last Name

License Number

Add New User

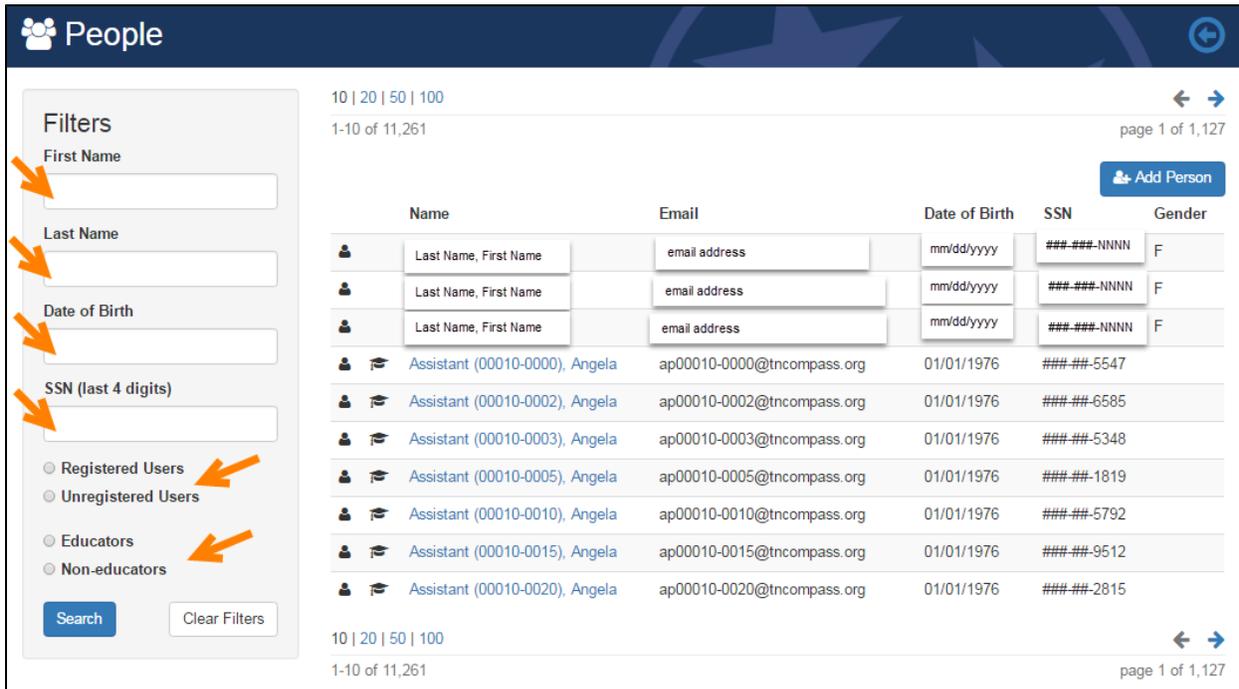
Licensed users are added by the state through the **Licensure** process and cannot be added by LEA personnel.

To add unlicensed users, click on the **Administration** tab and then click on the **People** button.



When the **People** window displays:

- Search for the person. Enter the **first name**, **last name**, **date of birth**, and/or **social security number** to locate the person.
- To filter the search based on **registered users**, **non-registered users**, **educators**, or **non-educators** click the appropriate radio buttons and click the **Search** button.
- To clear filters, click the **Clear Filters** button.



- If the person cannot be located, click the **Add Person** button.
- When the **Add New Person** pop-up window displays, enter the **First Name**, **Last Name**, and **email address** for the new person and click the **Find** button.

Add New Person ×

⚠ Adding a person with this process will **not** allow them to be evaluated. Evaluated staff must be on file as an active licensed educator.

First Name

Last Name

Email Address

Cancel Find Person

- TNCompass will perform a search to reduce the chance of creating a duplicate record.
- If the new person's record is located it is displayed on the screen.
- If the new person does not have a record, TNCompass displays a confirmation window stating the next step in the process will create a record for this person and he or she will be sent an email message to complete the new person registration process.

The following is an *Add New Person* screen with entries followed by results from the search,

 Add New Person ✕

 Adding a person with this process will **not** allow them to be evaluated. Evaluated staff must be on file as an active licensed educator.

First Name

Last Name

Email Address

 Add New Person ✕

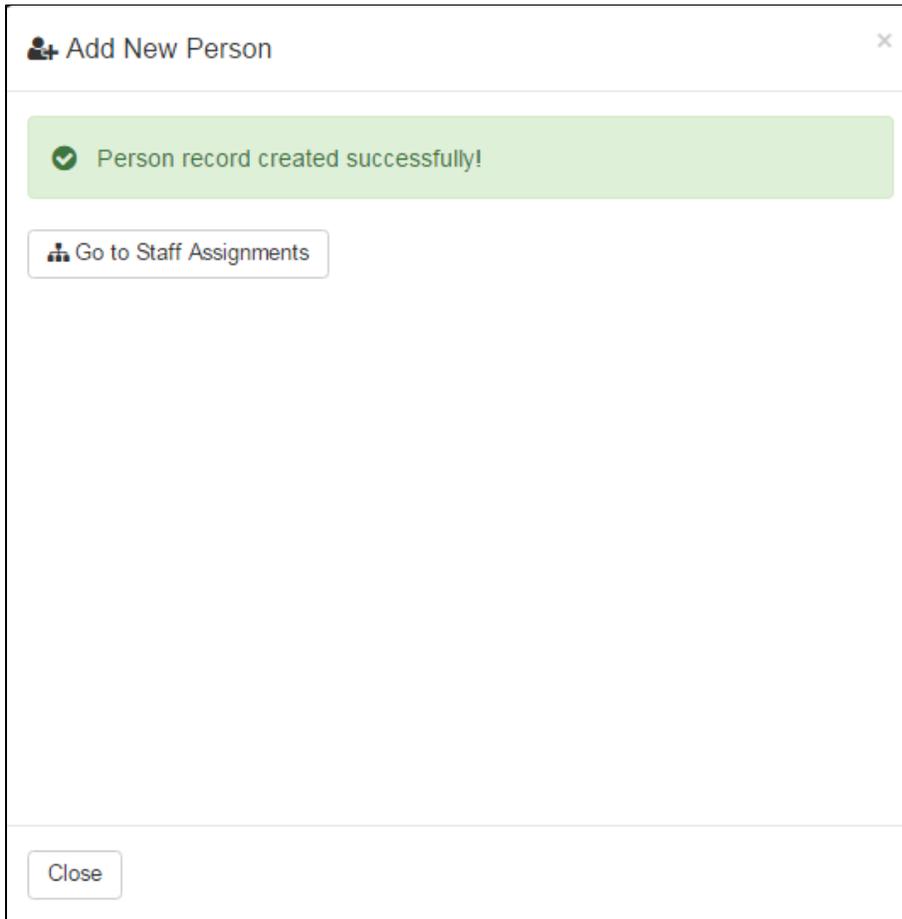
 Adding a person with this process will **not** allow them to be evaluated. Evaluated staff must be on file as an active licensed educator.

 Completing this step will create a new person record in TNCompass. The person will be notified at the given email address for creating a TNCompass account.

Person to be added:
James Ray
jray@gmail.com

- To create the New Person record, click the **Create Person** button.
- To change entries for the new person, click the **Back** button.
- To cancel the new person record creation, click the **Cancel** button.
- Click the **Create Person** button to create a new person record.

- TNCompass sends an email message to the person with links to complete the registration process and displays a pop-up window advising **Person record created successfully!**
- Administrators can then click the **Go to Staff Assignments** button, which will display the **Administration - Staff Assignments** page. The administrator can then assign the new person to a either a **Region, LEA,** and **School** and click the **Add Staff** button to assign the new person to the appropriate role.



TNCompass Evaluation: State-level Administrators

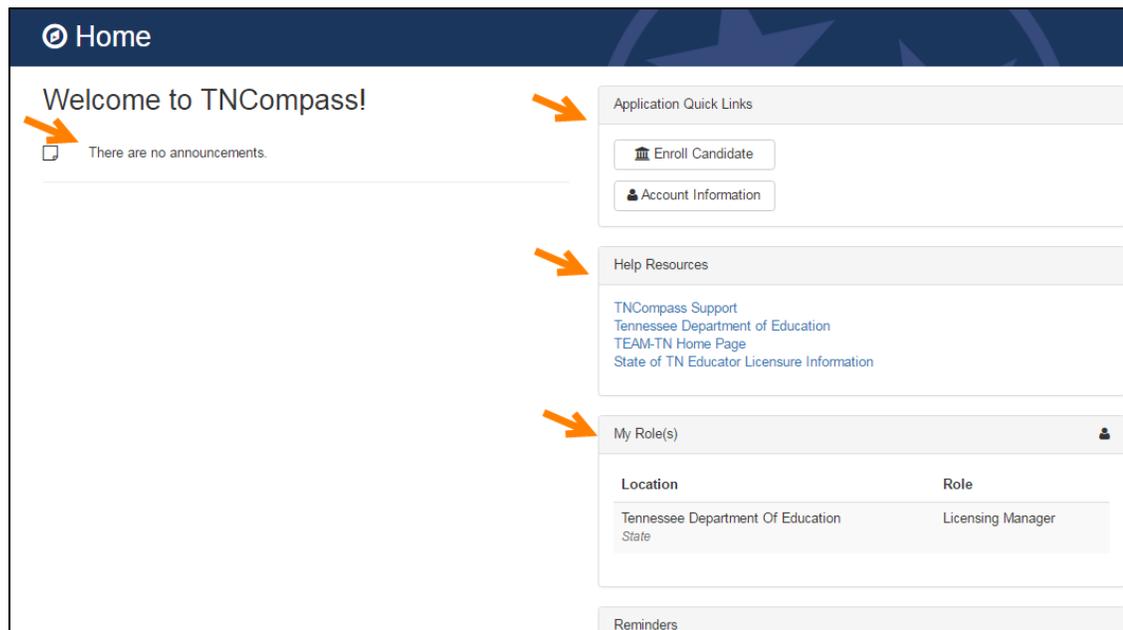
Links to User Guide Pages

- [Home or Dashboard for State-Level Administrators](#)
- [Staff Management](#)
- [User Management for State-Level Administrators](#)

Home or Dashboard for State-Level Administrators

Logging into TNCompass now delivers access to **Evaluation**, **Licensure**, **Staff Assignment**, and **Transaction** tools.

- [Login to the system.](#)
- The home dashboard displays for all users and roles in the system. Dashboards are specific to roles and responsibilities.
- **Announcements** lists announcements and notifications. Critical announcements will always be at the top left and may indicate important notices (e.g., site maintenance events).
- **Enroll Candidate** is one click access to the **Enroll Candidate** process.
- **Account Information** delivers one click access to the individual's account details.
- **Help Resources** delivers one click access to department support and documentation resources.
- **My Staff Assignments** displays current **location** and **role**.



Home

Welcome to TNCompass!

There are no announcements.

Application Quick Links

- Enroll Candidate
- Account Information

Help Resources

- [TNCompass Support](#)
- [Tennessee Department of Education](#)
- [TEAM-TN Home Page](#)
- [State of TN Educator Licensure Information](#)

My Role(s)

Location	Role
Tennessee Department Of Education State	Licensing Manager

Reminders

Staff Management

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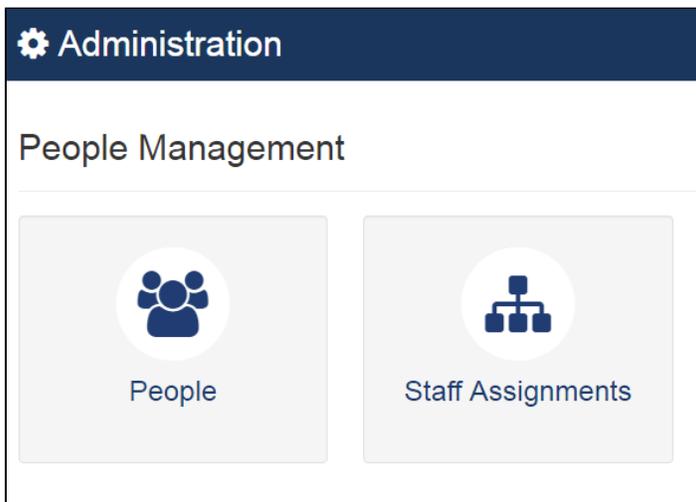
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Staff Assignments

Staff Filters

Academic Year
2015-2016

State EPP Region

State
Tennessee Department Of Educ: ▾

Staff Status
 Active Removed

First Name

Last Name

License Number

The following illustrates a *Region Selection* with a drop down list to select the appropriate region.

The screenshot displays the 'Staff Assignments' interface. At the top, there is a header with a tree icon and the text 'Staff Assignments'. Below this is a 'Staff Filters' section. Under 'Academic Year', the value '2015-2016' is shown. There are three filter buttons: 'State', 'EPP', and 'Region', with 'Region' being the active one. A 'Region' dropdown menu is open, showing a list of options. The current selection is 'Northwest Tennessee Core Regi'. The dropdown list includes: 'Select a Region', 'East Tennessee Core Regional Office', 'First Tennessee Core Regional Office', 'Memphis/ Shelby Core Regional Office', 'Mid Cumberland Core Regional Office', 'Northwest Tennessee Core Regional Office' (highlighted), 'South Central Core Regional Office', 'South East Tennessee Core Regional Office', 'South West/Memphis Core Regional Office', 'State Agencies/Special Schools', 'Unknown Region', and 'Upper Cumberland Core Regional Office'. Below the dropdown is the 'Staff Status' section with radio buttons for 'Active' (selected) and 'Removed'.

Selecting a region displays drop down lists for the LEAs within the region and then the schools within the selected LEA, as illustrated below.

The screenshot shows a sidebar with three main sections: Region, LEA, and School. At the top, there are three tabs: 'State', 'EPP', and 'Region', with 'Region' being the active tab. Below the tabs, the 'Region' section has a dropdown menu currently set to 'South East Tennessee Core Reg'. The 'LEA (clear selection)' section has a dropdown menu set to 'McMinn County'. The 'School' section has a dropdown menu with a list of schools: 'Select a School', 'Calhoun Elementary', 'Central High School', 'E K Baker Elementary', 'Englewood Elementary', 'McMinn High School', 'Mountain View Elementary' (which is highlighted in blue and has a mouse cursor over it), 'Niota Elementary', 'Riceville Elementary', 'Rogers Creek Elementary', and 'System-Wide School'. Below the school dropdown, there are two text input fields labeled 'Last Name' and 'License Number'.

The staff list for the selection(s) displays to the right of the **Staff Filter** sidebar.

The following staff list is fictitious and for illustration purposes only.

- Click the paper and pencil icon to edit the line entry.
- Click the trash can icon to delete the line entry.
- Click **Educator Profile** link to access the educator information.
- Click **Account** to access the educator account.
- Click **Add LEA Staff** button to add staff to the LEA.

10 | 20 | 50 | 100
← →

1-4 of 4
page 1 of 1

Location McMinn County (00540) Add LEA Staff

Status Active

License ↕	Name	Role	↕
874101939	Observer (00540), Olivia	Observer Only (not evaluated)	✎ 🗑
827394122	Resources (00540), Robert	HR Administrator	✎ 🗑
802081634	Superintendent (00540), Susan	District Administrator	✎ 🗑
829247731	Supervisor (00540), John	District Supervisor	✎ 🗑

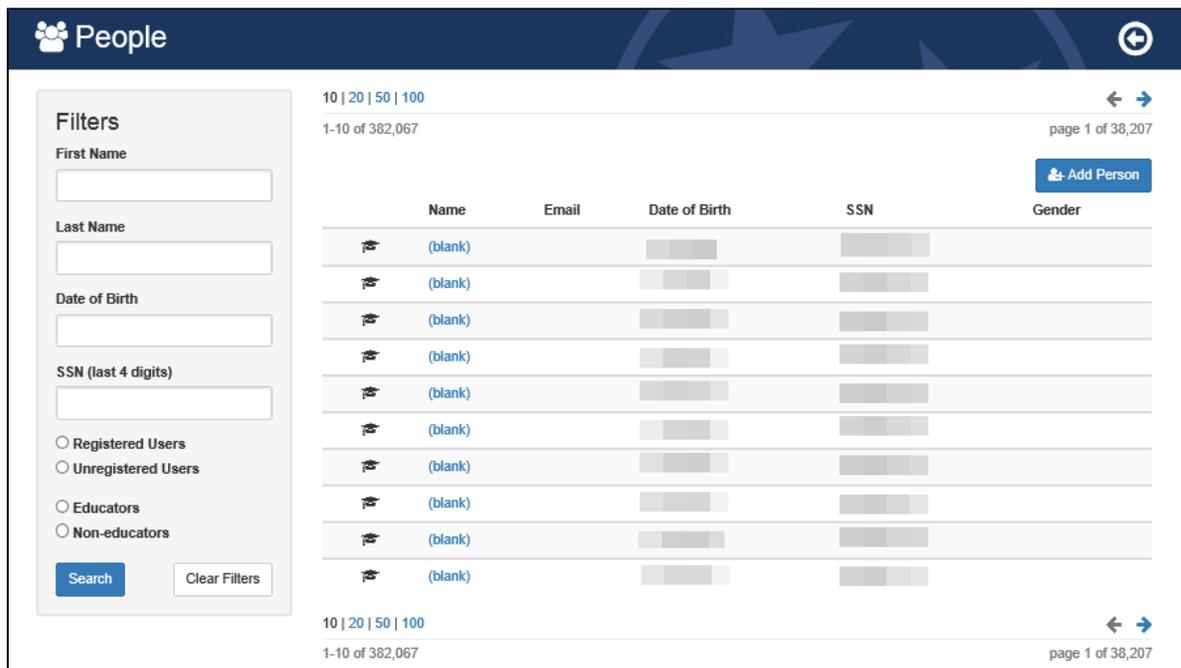
10 | 20 | 50 | 100
← →

1-4 of 4
page 1 of 1

Staff Assignments - Add Non-licensed Staff

i Non-licensed staff with a previous teaching license may already be in the system. Always search for the user before adding him or her to the system.

- Click **Administration** tab.
- Click **People** button.
- Search for the person to add using the **Filters** tools on the left side bar. Enter any or all of the criteria and click the **Search** button.
- If the person is found, click **Administration** and then **Staff Assignments** to add the person to your staff.
- If the person is not found, click **Add Person** button



When the **Add Person** pop-up window appears, enter the person's **First Name**, **Last Name**, and **Email** address.

The person will receive an email message to complete the registration process.

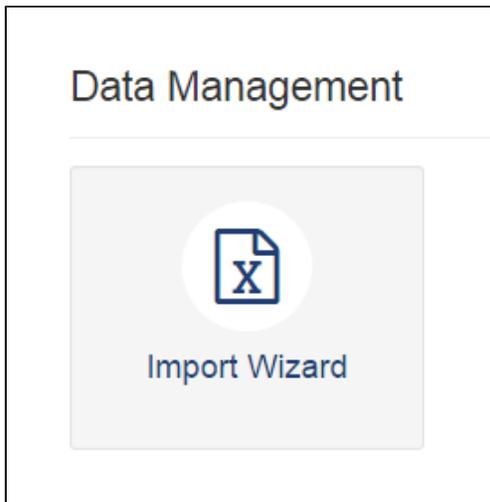
Once the person completes the registration process he or she can then be added to the staff, via the **Administration** and **Staff Assignments** process.

Staff Assignments - Data Management - Import Wizard

Bulk editing of staff assignments is efficiently accomplished using the **Data Management - Import Wizard**.

Access to bulk editing of staff assignment is limited to user authorized to perform this function for the specific locations.

- Click **Administration** tab,
- Click **Import Wizard** under the **Data Management** heading to open the wizard.
- The wizard walks the user through the process of selecting a location to export data and create a template, exporting the template to Excel, after modification is complete importing the template, validating the template, and processing the changes. The left hand sidebar tracks each step in the process.



- Select Location to generate a template. Click to select the Region, LEA, Schools for the template.
- When selections are complete click the **Generate Template** button.

 **Data Imports**



Import Wizard

 **Generate Template**

Select File & Import Data

Validate Data

Process Data

Staff Data Import

Please generate a file using the selections below.

Select location(s)

- Tennessee Department Of Education
 - Northwest Tennessee Core Regional Office (001)
 - Benton County (00030)
 - Benton Co Adult High School (0004)
 - Benton County Career / Technical Center (0009)
 - Big Sandy School (0010)
 - Briarwood School (0015)
 - Camden Elementary (0020)
 - Camden Central High School (0025)
 - Camden Jr High School (0027)
 - Holladay Elementary (0030)
 - System-Wide School (0000)
 - Carroll County (00090)
 - Carroll Co Tech Center (0007)
 - Carroll County Special Learning Center (0009)
 - System-Wide School (0000)
 - Hollow Rock - Bruceton (00092)

Generate Template

- When users already have a template, scroll to the bottom of the page and click to check the box labeled ***I already have a template.***
- Click ***Continue***

- The selected staff list is then exported to the users computer as an Excel file.
- Users already having a staff list do not have the file exported since he or she already has the file.
- Users can then modify the staff information in the Excel file.
- When all changes are made and checked for accuracy the file is ready to be imported into TNCompass for validation.
- On the wizard ***Staff Data Import*** window, note the wizard is tracking progress at ***Select File & Import Data.***
- Click ***Choose File***

- Select the updated file from the computer.
- Click **Continue**

Staff Data Import

Please select a file containing the Staff data.

Choose File TNCompass_Staff_ImportTemplate.xlsx

Cancel
Continue

- The file is uploaded and ready for validation in TNCompass.
- The wizard tracks the progress and shows **Validate Data**.
- Click the **Validate** button to validate the information.

x Data Imports ←

Import Wizard

Generate Template

Select File & Import Data

↻ **Validate Data**

Process Data

TNCompass_Staff_ImportTemplate.xlsx

Staff & Educators > Staff
 Created 5/17/2016 3:23:27 PM (Central) by Gloria McMahon
 This preview only shows the first ten records. There are 20 record(s) total.

District Id	School Id	License Number	First Name	Middle Name	Last Name	Email	Role
00094		827712527	Olivia		Observer (00094)	oliviaobserver00094@tncompass.org	Observer
00094		867723711	Robert		Resources (00094)	robertresources00094@tncompass.org	HR Admin
00094		889616490	Susan		Superintendent (00094)	susansuperintendent00094@tncompass.org	District Ad
00094		845381154	John		Supervisor (00094)	johnsupervisor00094@tncompass.org	District Su
00094	0000	824180892	Angela		Assistant (00094-0000)	ap00094-0000@tncompass.org	Assistant I
00094	0000	818352682	Homer		Observer (00094-0000)	ob00094-0000@tncompass.org	Observer
00094	0000	825172645	Paul		Principal (00094-0000)	principal00094-0000@tncompass.org	Principal
00094	0000	858451215	Mary		Teacher (00094-0000)	mary00094-0000@tncompass.org	Teacher
00094	0005	808699082	Angela		Assistant (00094-0005)	ap00094-0005@tncompass.org	Assistant I
00094	0005	812547497	Homer		Observer (00094-0005)	ob00094-0005@tncompass.org	Observer

Cancel Import
Validate

- If the data is not successfully validated, TNCompass will advise of errors. Correct the errors and validate the data again. Repeat if necessary.
- When the data has been successfully validated, TNCompass provides a message to advise **The import was validated . . .**
- Users can download the full report by clicking the **Download full report** button.
- The wizard again tracks the progress and shows **Process Data** on the left sidebar.
- The file is ready to be processed, click the **Process** button.

Import Wizard

Generate Template

Select File & Import Data

Validate Data

➤ **Process Data**

i This import was **Validated** on 5/17/2016 3:24:35 PM (Central) by Gloria McMahon

Summary

- Staff Match (20)

[Download full report](#)

TNCompass_Staff_ImportTemplate.xlsx

Staff & Educators > Staff

Created 5/17/2016 3:23:27 PM (Central) by Gloria McMahon

This preview only shows the first ten records. There are 20 record(s) total.

District Id	School Id	License Number	First Name	Middle Name	Last Name	Email	Role
00094		827712527	Olivia		Observer (00094)	oliviaobserver00094@tncompass.org	Observer
00094		887723711	Robert		Resources (00094)	robertresources00094@tncompass.org	HR Admin
00094		889816460	Susan		Superintendent (00094)	susansuperintendent00094@tncompass.org	District Ad
00094		845381154	John		Supervisor (00094)	johnsupervisor00094@tncompass.org	District Su
00094	0000	824160692	Angela		Assistant (00094-0000)	ap00094-0000@tncompass.org	Assistant i
00094	0000	818352982	Homer		Observer (00094-0000)	ob00094-0000@tncompass.org	Observer
00094	0000	825172845	Paul		Principal (00094-0000)	principal00094-0000@tncompass.org	Principal
00094	0000	858451215	Mary		Teacher (00094-0000)	mary00094-0000@tncompass.org	Teacher
00094	0005	808696082	Angela		Assistant (00094-0005)	ap00094-0005@tncompass.org	Assistant i
00094	0005	812547497	Homer		Observer (00094-0005)	ob00094-0005@tncompass.org	Observer

◀ ▶

Cancel Import
Revalidate
Process

- When the file is successfully processed, TNCompass confirms the date and time processed.
- The wizard tracks the process as **Completed**.

Data Imports

Import Wizard

- Generate Template
- Select File & Import Data
- Validate Data
- Process Data
- Completed**

This import was **Processed** on 5/17/2016 3:25:31 PM (Central) by Gloria McMahon.

TNCompass_Staff_ImportTemplate.xlsx

Staff & Educators > Staff
Created 5/17/2016 3:23:27 PM (Central) by Gloria McMahon
This preview only shows the first ten records. There are 20 record(s) total.

District Id	School Id	License Number	First Name	Middle Name	Last Name	Email	Role
00094		827712527	Olivia		Observer (00094)	oliviaobserver00094@tncompass.org	Observer
00094		887723711	Robert		Resources (00094)	robertresources00094@tncompass.org	HR Admin
00094		889816490	Susan		Superintendent (00094)	susansuperintendent00094@tncompass.org	District Ad
00094		845381154	John		Supervisor (00094)	johnsupervisor00094@tncompass.org	District Su
00094	0000	824180892	Angela		Assistant (00094-0000)	ap00094-0000@tncompass.org	Assistant f
00094	0000	818352882	Homer		Observer (00094-0000)	ob00094-0000@tncompass.org	Observer
00094	0000	825172845	Paul		Principal (00094-0000)	principal00094-0000@tncompass.org	Principal
00094	0000	858451215	Mary		Teacher (00094-0000)	mary00094-0000@tncompass.org	Teacher
00094	0005	809899082	Angela		Assistant (00094-0005)	ap00094-0005@tncompass.org	Assistant f
00094	0005	812547497	Homer		Observer (00094-0005)	ob00094-0005@tncompass.org	Observer

< >

Start a new import
 Download full report

User Management for State-Level Administrators

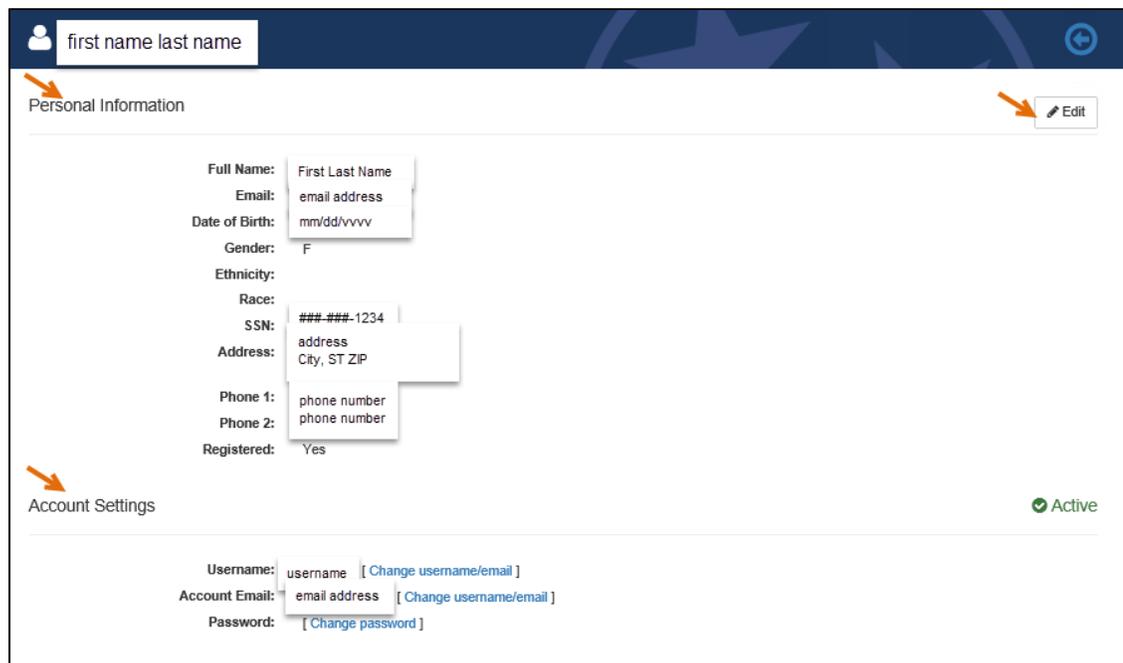
- User Management Permissions
- View User Information
- Add New User

Each user can view and edit his or her own **Personal Profile** information.

- Click on name in the upper right hand corner of the window and select **Account** or click on the **Account Information** button under **Application Quick Links** on the home page.



- When the **personal information** and **account information** page displays, the users name appears at the top of the window with **Personal Information** and **Account Settings information** displayed.
- Validate and edit information as needed; changes save automatically.
- Under **Account Settings** users can change their **Username, Account Email, and/or Password**. Click on the link following the appropriate **Account Settings** entry to make the changes.



first name last name

Personal Information Edit

Full Name: First Last Name
 Email: email address
 Date of Birth: mm/dd/yyyy
 Gender: F
 Ethnicity:
 Race:
 SSN: ###-##-1234
 Address: address
 City, ST ZIP
 Phone 1: phone number
 Phone 2: phone number
 Registered: Yes

Account Settings Active

Username: username [\[Change username/email \]](#)
 Account Email: email address [\[Change username/email \]](#)
 Password: [\[Change password \]](#)

User Management Permissions

Administrators with authorized permissions have tools to manage user information.

Permissions or authorization within TNCompass for user administration are as follows:

- State-level administrators can view all LEAs, educators, and non-licensed users in the state.
- Regional or LEA permitted staff can view the educators in their respective regions or districts.
- Principals can see all assistant principals and educators in their own schools.
- Assistant principals can see all educators in their own schools. Assistant principals cannot see principals or other assistant principals.
- Teachers will only be able to view their own record.

View User Information

User information is available to view for individual educators from the **Educator's** tab. Search for an Educator and when the specific educator information is found, click on the educator name to display the Educator Profile record.

User information is available through the **Administrator - Staff Assignment** functions within TNCompass.

- Select **Region, LEA, and School** to locate the user.
- Click on **Educator Profile** or **Account** to view user information.

Staff Assignments

10 | 20 | 50 | 100

1-5 of 5

page 1 of 1

Location Coffee County Middle School (0010)

Status Active

Add School Staff

License	Name	Role			
835291557	Assistant (00160-0010), Angela	Assistant Principal	✓	✖	Educator Profile Account
875511842	Observer (00160-0010), Homer	Observer Only (not evaluated)	✓	✖	Educator Profile Account
802106312	Occupational (00160-0010), Oscar	Teacher	✓	✖	Educator Profile Account
811623587	Principal (00160-0010), Paul	Principal	✓	✖	Educator Profile Account
841626350	Teacher (00160-0010), Mary	Teacher	✓	✖	Educator Profile Account

- Alternately, search for a specific user by **First Name**, **Last Name**, and/or **License Number**.

Staff Filters

Academic Year
2015-2016

State EPP Region

State
Tennessee Department Of Educa ▼

Staff Status
 Active Removed

First Name

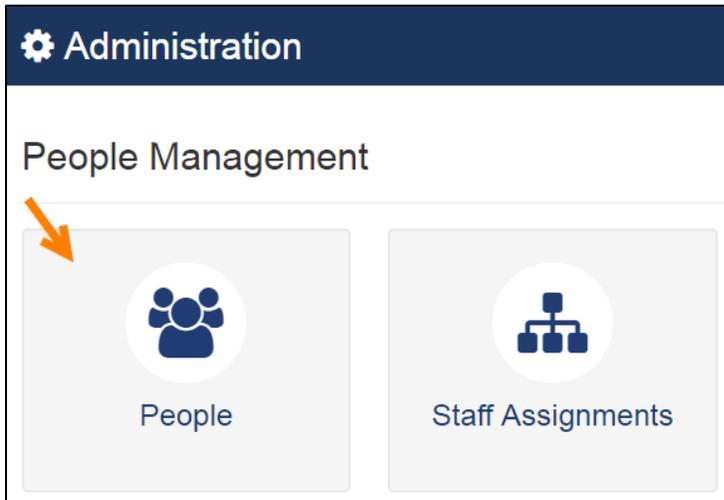
Last Name

License Number

Add New User

Licensed users are added by the state through the **Licensure** process and cannot be added by LEA personnel.

To add unlicensed users, click on the **Administration** tab and then click on the **People** button.



When the **People** window displays:

- Search for the person. Enter the **first name**, **last name**, **date of birth**, and/or **social security number** to locate the person.
- To filter the search based on **registered users**, **non-registered users**, **educators**, or **non-educators** click the appropriate radio buttons and click the **Search** button.
- To clear filters, click the **Clear Filters** button.

10 | 20 | 50 | 100
1-10 of 11,261
page 1 of 1,127

Filters

First Name

Last Name

Date of Birth

SSN (last 4 digits)

Registered Users
 Unregistered Users
 Educators
 Non-educators

Search Clear Filters

Name	Email	Date of Birth	SSN	Gender
Last Name, First Name	email address	mm/dd/yyyy	###-##-NNNN	F
Last Name, First Name	email address	mm/dd/yyyy	###-##-NNNN	F
Last Name, First Name	email address	mm/dd/yyyy	###-##-NNNN	F
Assistant (00010-0000), Angela	ap00010-0000@tncompass.org	01/01/1976	###-##-5547	
Assistant (00010-0002), Angela	ap00010-0002@tncompass.org	01/01/1976	###-##-6585	
Assistant (00010-0003), Angela	ap00010-0003@tncompass.org	01/01/1976	###-##-5348	
Assistant (00010-0005), Angela	ap00010-0005@tncompass.org	01/01/1976	###-##-1819	
Assistant (00010-0010), Angela	ap00010-0010@tncompass.org	01/01/1976	###-##-5792	
Assistant (00010-0015), Angela	ap00010-0015@tncompass.org	01/01/1976	###-##-9512	
Assistant (00010-0020), Angela	ap00010-0020@tncompass.org	01/01/1976	###-##-2815	

10 | 20 | 50 | 100
1-10 of 11,261
page 1 of 1,127

- If the person cannot be located, click the **Add Person** button.
- When the **Add New Person** pop-up window displays, enter the **First Name**, **Last Name**, and **email address** for the new person and click the **Find** button.

Add New Person ×

⚠ Adding a person with this process will **not** allow them to be evaluated.
Evaluated staff must be on file as an active licensed educator.

First Name

Last Name

Email Address

Cancel **Find Person**

- TNCompass will perform a search to reduce the chance of creating a duplicate record.
- If the new person's record is located it is displayed on the screen.
- If the new person does not have a record, TNCompass displays a confirmation window stating the next step in the process will create a record for this person and he or she will be sent an email message to complete the new person registration process.

The following is an *Add New Person* screen with entries followed by results from the search,

 Add New Person ✕

 Adding a person with this process will **not** allow them to be evaluated. Evaluated staff must be on file as an active licensed educator.

First Name

Last Name

Email Address

 Add New Person ✕

 Adding a person with this process will **not** allow them to be evaluated. Evaluated staff must be on file as an active licensed educator.

 Completing this step will create a new person record in TNCompass. The person will be notified at the given email address for creating a TNCompass account.

Person to be added:
James Ray
jray@gmail.com

- To create the New Person record, click the **Create Person** button.
- To change entries for the new person, click the **Back** button.
- To cancel the new person record creation, click the **Cancel** button.
- Click the **Create Person** button to create a new person record.

- TNCompass sends an email message to the person with links to complete the registration process and displays a pop-up window advising **Person record created successfully!**
- Administrators can then click the **Go to Staff Assignments** button, which will display the **Administration - Staff Assignments** page. The administrator can then assign the new person to a either a **Region, LEA,** and **School** and click the **Add Staff** button to assign the new person to the appropriate role.

