

LEAD 2010 – 2011

New LEAD Coordinator Training

This presentation will cover:

- LEAD Terminology
- The EPSB LEAD web application
- Reading LEAD reports
- An overview of the LEAD steps

Terminology

Basic Terminology

- Extract
 - The process in Infinite Campus for generating a LEAD file to upload to the EPSB website
- Full Data Report
 - A document showing all data submitted through the LEAD process
- LEAD
 - Local Educator Assignment Data
- LEAD file/LEAD Extract File
 - The file generated during the extract process in Infinite Campus

Basic Terminology

- Preliminary Audit Report
 - The primary tool for working through LEAD data. This report should be generated by the coordinator after every upload. It will display only those individuals with unresolved LEAD issues.
- Report/LEAD Report
 - The generic term used when referring to all things LEAD
- Run Report
 - Generating the PDF of the Preliminary Audit Report. This does not indicate a new upload is necessary.
- Sign off
 - Entering ones user ID, password, and full name to indicate completion of the LEAD report/LEAD process

Basic Terminology

- Staff Warning
 - Comments appearing in red (other than "certification issue") on the school page of the preliminary audit report. These warnings must be corrected on the preliminary audit report but can be disregarded on the full data report.
- Submit or Finalize
 - Finishing the LEAD report by using the sign off feature. Submitting indicates that work on the LEAD report is complete and all errors are either clear or are understood to be true certification issues. Once submitted/finalized, a district cannot access the LEAD data for further editing.
- Upload
 - Sending the LEAD file to EPSB via the LEAD website once the file has been generated during the extract process in Infinite Campus

Report Comments

- Certification Issue
 - There is an error with one or more of this individual's courses or with their MUNIS jobclass code. This comment is not always indicative of a problem with the individual's certificate; it usually indicates a miscode of some kind.
- Holds only SOE/Must Submit COE
 - The only valid credential held by the teacher is a Statement of Eligibility. If the teacher is new, please file the Confirmation of Employment with the KTIP office. If the teacher has completed KTIP, their current certification has expired and additional steps need to be taken.

Report Comments

- Incorrectly Coded (This error comment will only appear on the Edit LEAD Data Page).
 - The content or the population is currently displaying "none." Supply the needed information to correct
- Insufficient Certification (course)
 - The teacher's certification does not match one or more parameters of the course, but the LEAD system is unable to identify the specific problem

Report Comments

- Insufficient Certification (MUNIS)
 - The teacher/administrator cannot clear this particular jobclass with their current certification
- KTIP Approved
 - This comment can indicate 2 different things:
 - 1. The individual has recently completed KTIP but the final report has not yet been submitted by the District KTIP coordinator
 - 2. The individual has been approved to enter KTIP but the internship certificate has not yet been processed

Report Comments

- ❑ KTIP Final
 - The individual has recently completed KTIP and a final report has been received. Processing is not complete due to one or more missing items (usually \$\$)
- ❑ No Courses for Staffmember
 - STAFF WARNING - this indicates that someone with an employee type of "Teacher" is not assigned as primary or secondary teacher on any course in the LEAD file. All persons with an employee type of "Teacher" should be assigned as primary or secondary on at least one course.

Report Comments

- ❑ Out of Field
 - The content specified for the course does not match the teacher's certification area
- ❑ Out of Grade Range
 - The grade level (s) of the students enrolled in the course do not match the teacher's certification area
- ❑ Out of Population
 - The population specified for the course does not match the teacher's certification area

Report Comments

- ❑ Specify Content
 - The content is currently displaying "none." To correct this, assign a valid state code on the course tab. If the state code of 909999 has been selected, assign the appropriate content on the section tab.
- ❑ Specify Population
 - The population is currently displaying "none" indicating there are no students enrolled in the course. To correct this, either assign students to the section or assign the appropriate population on the section tab
- ❑ SSN Not Found in EPSB Database
 - STAFF WARNING - this indicates that the SSN as it appears in Infinite Campus does not match any SSN on file with EPSB. Should be addressed for all employee types as it indicates they are attached to a course.

Tips

Helpful Hints

- The LEAD process is a team approach.
- Involve HR staff, curriculum specialists, special ed coordinators, guidance counselors, finance officers
 - Provide training to staff as needed (counselors, principals, attendance staff, and curriculum specialists)
- Create a consistent method for communicating information from the school to the district level during LEAD reporting

Helpful Hints

- Upload your report early and as frequently as needed
 - Early upload allows staff assignment changes to happen early
 - As paperwork is processed at EPSB, corrections happen automatically
- Uploading to our site allows you to view any certification or coding errors AND allows us to see that information so we can help you. Your report is not officially “submitted” until you sign off.
- **Do not wait to hear from EPSB after an upload. We do not notify you concerning errors during the uploading phase.**

Related Topics

- KECI (Kentucky Educator Certification Inquiry)
 - Principals and district personnel can use the permissions tool in KECI to find out exactly what an individual can teach. If you have questions, please contact the LEAD Help Desk.
- MUNIS
 - MUNIS errors related to job class corrections will be corrected by re-submitting the district PSD/CSD file to KDE (usually done by your finance officer)

The Online EPSB LEAD Web Application

Access

- Log in from the www.epsb.ky.gov homepage then select LEAD from your EPSB Online Services menu OR
- Web address to directly access the online EPSB LEAD site is <https://wd.kyepsb.net/EPSB.WebApps/LEAD>
- Login using your user ID and password
- Contact Cindy Godsey or the EPSB help desk if you have problems logging in

Navigating the Site

The screenshot shows the top navigation bar with the following links: [KECI](#), [Intro](#), [Upload Files](#), [Edit LEAD Data](#), [Reports](#), [Signoff and Submit Final LEAD Data](#), and a dropdown menu for [Allen County](#). Below the navigation bar is a welcome message: "Welcome to the online EPSS LEAD Site!" followed by a paragraph stating that the site has many tools to help complete a LEAD Report, available from September 9th. A "Getting Started" section lists the following steps: 1. Upload the files, 2. Run the Preliminary Audit Report, 3. Investigate lock-outs and make needed adjustments, 4. Use your access to make the changes, 5. Upload the files again, 6. Run the Preliminary Audit Report again, 7. Investigate and make adjustments again, 8. Continue to repeat this until the LEAD data is correct, and 9. Submit the LEAD data on or before the deadline **November 1st**. A note at the bottom states that LEAD Coordinators may also choose to edit using the "Edit LEAD Data" tool, but that changes made using this tool are not saved in the districts and are saved on EPSS servers, with a warning that additional uploads will erase changes made in the LEAD Editor.

Navigating the Site

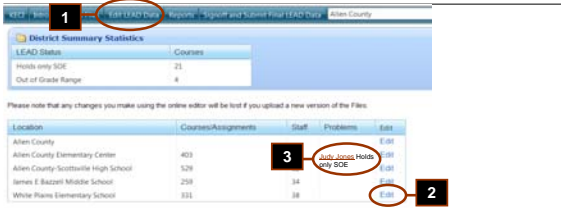
The screenshot is identical to the one above, but with six yellow callout circles containing numbers 1 through 6. Callout 1 points to the "KECI" link, callout 2 to the "Intro" link, callout 3 to the "Upload Files" link, callout 4 to the "Edit LEAD Data" link, callout 5 to the "Reports" link, and callout 6 to the "Signoff and Submit Final LEAD Data" link.

1. Link to Kentucky Educator Certification Inquiry (KECI) to check certificate type, status, and permissions
2. Returns to the main LEAD page
3. Page to upload file once it has been exported from the SIS
4. Online LEAD editor – use for final corrections once SIS corrections are complete
5. View Preliminary Audit Report, Full Data Report for district and specific schools; e-mail reports to building level principals
6. Use your user ID and password to digitally signoff and submit your report by November 1

Upload page

The screenshot shows the "LEAD File Upload Instructions from Infinite Campus" page. It includes a "Pre-upload step" which is to zip the file once it has been extracted from Infinite Campus, with sub-steps: Right click on the file, Click "Send to", and Click "Compressed Folder". The "Upload steps" section lists: 1. Click "Browse" below, 2. Click on the following: a. Desktop, b. (if you placed the file in a folder titled LEAD, click that next), 3. Click on "LEAD_###_2_10", a. It may have .xml or .xml.zip at the end, b. Make sure that it is the one with the zipper on the folder, 4. Click "open" after the file has been selected, and 5. Click the "Upload" button. Uploading may take several minutes. At the bottom, there is a "Select File to Upload:" label, a text input field, a "Browse" button, and an "Upload" button.

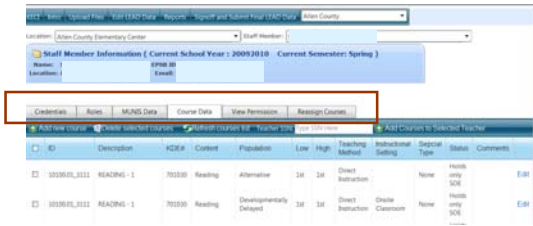
Online LEAD Editor Main Edit Screen



1. To access this page, click “Edit LEAD Data”
2. To review an entire school, click the edit link
3. To edit an individual, click on the name

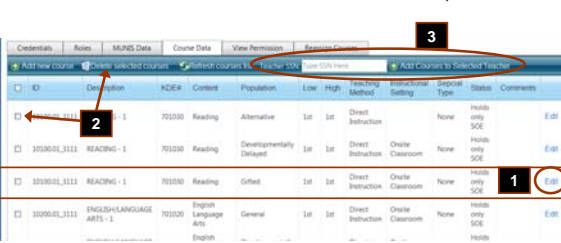
Online LEAD Editor Individual Edit Screen

- Use tabs show and edit information
 - Roles – can be added here
 - MUNIS data when loaded
 - Course data (edit here)
 - Permissions for this teacher
 - Reassign all courses



Online LEAD Editor Individual Edit Screen: course data tab

1. Click “Edit” for courses showing errors in status column
2. Delete multiple courses if necessary
3. Add an additional teacher to courses (check mark courses and enter additional teacher’s SSN)



Sign off page

Home | Info | Upload Files | Edit LEAD Data | Reports | Signoff and Submit Final LEAD Data | **Demille Independent**

Signing below indicates that you are finished working with your LEAD data, and expect no further uploads or changes.

I hereby affirm and declare that the information provided in this report is true, accurate, and complete to the best of my knowledge. I further verify and understand that by typing my name in the signature box, I am affixing my electronic signature and that this constitutes a legally binding document.

User ID:

Full Name:

Password:

[Click Here To Agree And Digitally Sign](#)

Reports

- Preliminary Audit Report
- Full Data Report
- E-mailing reports

Reports

- Preliminary Audit Report
 - **Run after every upload**
 - Use to investigate errors
- Full Data Report
 - Run by mid October (fall) and by mid February (spring)
 - Use the e-mail tool to distribute portions to the appropriate school personnel for verification
 - Save a copy on disk or hard drive for a record of all data submitted

Full Data Report

- Use to verify staff lists after first upload each semester
- Download in mid October (FALL) and mid-February (SPRING)
- Distribute to schools for verification of the information (use LEAD application e-mail tool)
- Make sure all principals have reviewed the information prior to HQ in March
 - Any needed corrections will be made by the school/district by unlocking your Spring report
 - Will result in all schools having to start over with HQ report

Reports

E-mailing Reports

E-mailing reports

- Check name of report recipient
 - If incorrect person is showing, update role in KECI
 - Individual must log in to update incorrect or missing e-mail addresses
- Type in message – be specific about which report you want the individual to view
- Click “Send Message” – this will send a link to this report page for their school only



Teacher List Review

- Use the e-mail tool to send each school's full report early each reporting period
- Have school level staff (or district where appropriate) review the staff list and compare EPSB Name to SIS Name
 - If they are different individuals, correct the SSN at the school level
 - If someone's name has changed (marriage etc), they can contact EPSB to have the name changed in our database or change it by logging into their account
 - Make sure all teaching staff are listed in both the SIS and the EPSB columns

School Full Data Report

SIS	Teacher #	EPSB Name	EMPLOYEE	SIS NAME
111111AB	111111AB		SUPPORT	FISHER, BRIGGS
123456CD	123456CD		SUPPORT	GIBSON, DEBBIE
101943EF	101943EF		SUPPORT	WILLIAMS, DAVID
101950GH	101950GH		SUPPORT	CARR, HANBET
101443IJ		Adams, Virginia B		
100389KL		Baird, Sara Lynn		
100644MN	100644MN	Bowden, Roberta	TEACHER	BOWDEN, ROBERTA
111812OP	111812OP	Bush, Lisa Catherine	TEACHER	CHARLES, VICKY
111813QR	111813QR	Charles, Vicky Lynn	TEACHER	COX, BRANDON
100879ST	100879ST	Cox, Brandon Paul	TEACHER	DAVIS, DERRA
100208UV	100208UV	Clark, Diana Rebecca	TEACHER	
100300WX		Clark, Diana Rebecca	TEACHER	BROWN, ANGELINE
104730YZ	104730YZ	Conrad, Jeanette M	TEACHER	
100220BA	100220BA	Conrad, Jeanette M	TEACHER	
100890CC		Conrad, Lisa Anne	TEACHER	
100844DE	100844DE	Hartford, Linda Carol	TEACHER	HARTFORD, LINDA
100305FG	100305FG	Hartford, Linda Carol	TEACHER	HENDERSON, MICHELLE
101712HI		Jones, Stephen Elliot	TEACHER	
100156JK		Lewis, Tracy	TEACHER	WATSON, WEE
100623LM	100623LM	McCoy, Tracy M	TEACHER	
102218NO	102218NO	Moore, Tammy Luke	SUPPORT	MORGAN, TIMOTHY
100644PQ		Paul, Dawn	TEACHER	
104195RS	104195RS	Patton, Sara Roseanne	TEACHER	PETER, SARA
102277TU	102277TU	Paul, Stanley E	TEACHER	POOL, STAN
100644VW	100644VW	Rhodes, Jackson	TEACHER	RHODES, JACKSON
100545XZ	100545XZ	Sampson, Kent A	SUPPORT	SAMPSON, KENT
10790801	10790801	Smith, Cindy L	TEACHER	SMITH, CINDY
10248802	10248802	Smith, Michele LaTrina	TEACHER	SMITH, MICHELLE
10122003		Smith, Michele LaTrina	TEACHER	
10790804	10790804	Stark, David P	TEACHER	ADAMS, SEVY
11122005	11122005	Stark, David P	TEACHER	STARK, DAVID P

- Compare **EPSB Name** to **SIS Name**
 - Examples A and B
- Look for teachers **without SIS data**
 - Examples C and D

The LEAD Steps

Infinite Campus Steps

- Step 1 – Create the LEAD extract file in Infinite Campus
 - Before creating the extract file:
 - Run ad hoc reports to check for errors
 - Selections on extract page
 - For a smaller data set, select only one school
 - All schools must be included in final extract
 - Don't make any changes on EPSB website with just one school loaded
 - Formats – XML, CSV, HTML
 - XML is required for upload
 - Use CSV (Excel spreadsheet) or HTML if you want to look at specific data – these are in the raw file format

Infinite Campus Steps

- Step 1 – continued
 - Extract Summary (Error report)
 - The summary error report created during the extract process indicates records that will not be included in the file uploaded to EPSB.
 - These are NOT your LEAD errors; they do need to be resolved
 - Complete the extract process and upload to the EPSB site even if errors remain at first
 - Save and Zip the file

EPSB Site Steps

- Step 2 – Upload the file to the EPSB website
 - The EPSB LEAD system will warn you if the file name is not correct. It must be a zipped file. Acceptable versions include:
 - LEAD_xxx_1_11 (icon must have zipper)
 - LEAD_xxx_1_11.xml (icon must have zipper)
 - LEAD_xxx_1_11.xml.zip
 - Replace the 1 with a 2 for the spring report
 - If duplicate data exists in your file, it will not load = big red stop sign on upload
 - If you see the stop sign, e-mail EPSBLEADTEAM@ky.gov with your name, the district name, and the time of your error

EPSB Site Steps

- Step 3 – Open and review the report
 - Always open preliminary audit report immediately after successful upload
 - Use the “comments” to determine how to correct errors
 - After the first upload, have the schools review the staff list on the full data report for inaccuracies

Correcting and Finalizing

- Step 4 – Correct issues
 - Make corrections in Infinite Campus
 - Repeat Steps 1, 2, and 3 as many times as needed
 - STOP HERE – these steps will be repeated multiple times. Do not move on until most corrections have been made using Infinite Campus
 - Final edits can be done in the LEAD application (*do not go to this step until all possible corrections have been made in Infinite Campus and uploaded through the LEAD application*)

Correcting and Finalizing

- Step 5 – Submit the report
 - Prior to sign off, have each school principal verify the full report for their school. Things they should look for include:
 - Teachers on the 1st page showing with no courses
 - Teachers with incorrect or missing schedules or content
 - Teachers missing from the report completely.
 - NOTE: collaborating special education teachers will not have an individual listing but should appear in the teacher list.
 - HQ status for each course once it has been entered at the school
 - Sign off indicates you are done working with the report and all data is accurate
 - No changes after sign off
 - Errors still on the report as of Nov. 1 will be reported to KDE

Questions?

More questions?

- Contact the EPSB LEAD Team
 - EPSBLEADTEAM@ky.gov
 - 502-564-4606 or 888-598-7667
- This presentation will be available for download at www.epsb.ky.gov/certification/LEAD.asp
