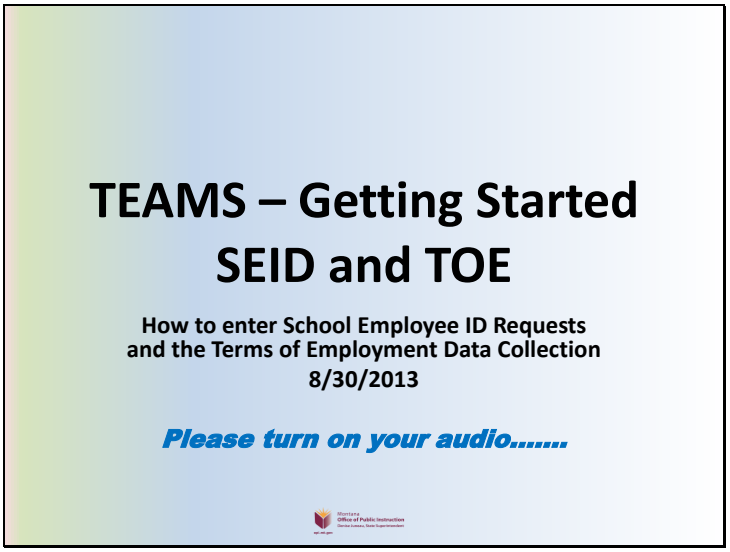
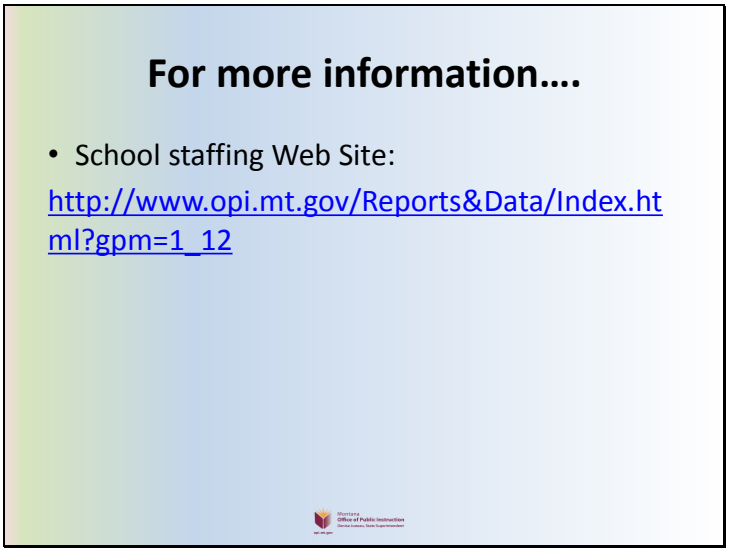
Slide 1



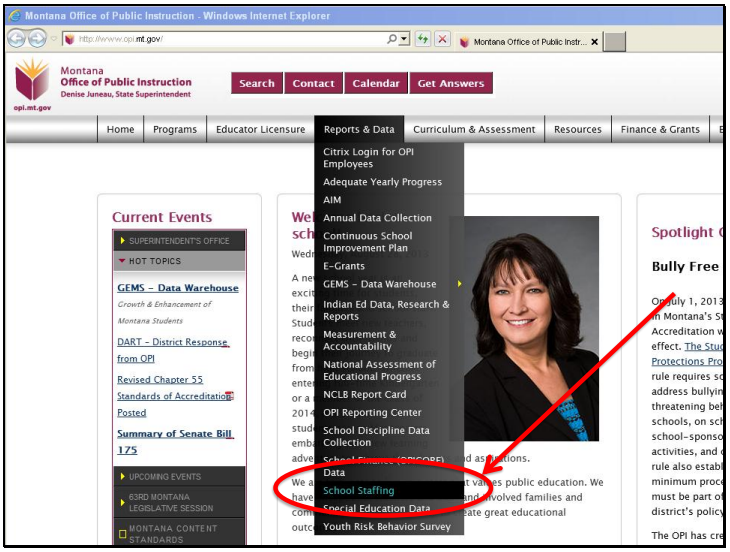
TEAMS – Getting Started. This brief presentation will show you how to login, navigate the screens, and submit your data to OPI. At the end of this presentation, you'll find contact information for staff at OPI who can assist you with questions.

Slide 2



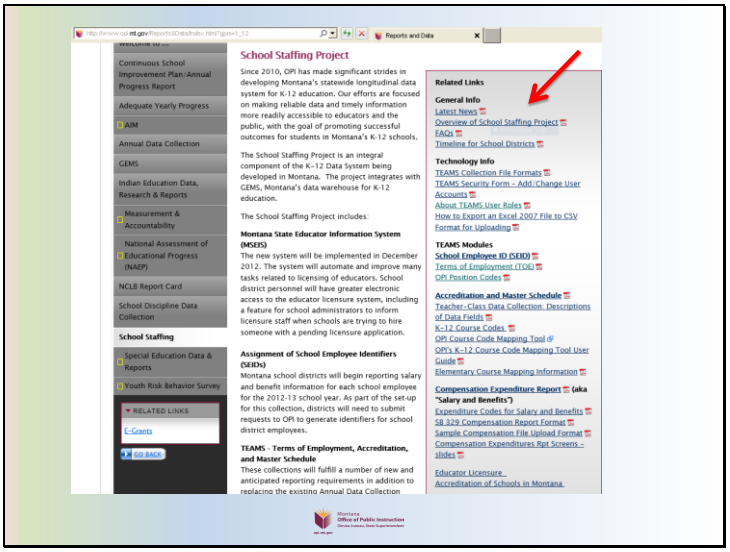
For more information about the School Staffing project, or "TEAMS", please visit the OPI School Staffing web site at the address shown on your screen. The next screen shows how to find that page.

Slide 3



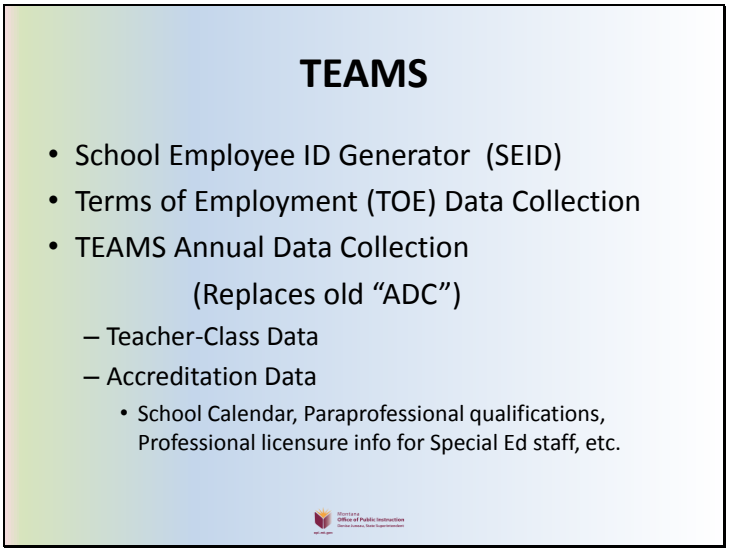
On the OPI website at http:/OPI.mt.gov, click <Reports and Data>, then choose ‘‘School Staffing.’’

Slide 4



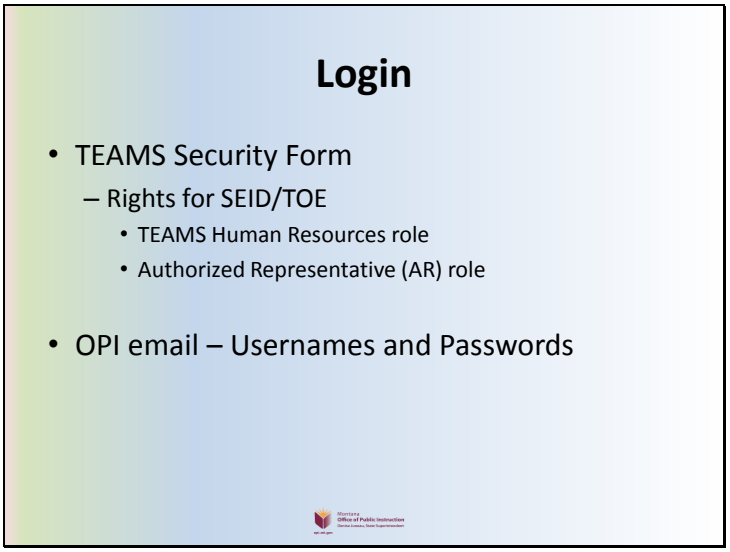
On the School Staffing page, you'll find the most up-to-date information, including frequently asked questions about all parts of the project, the project timeline, and instructions about the data being collected. Please be sure to call OPI staff if you cannot locate the information you need.

Slide 5



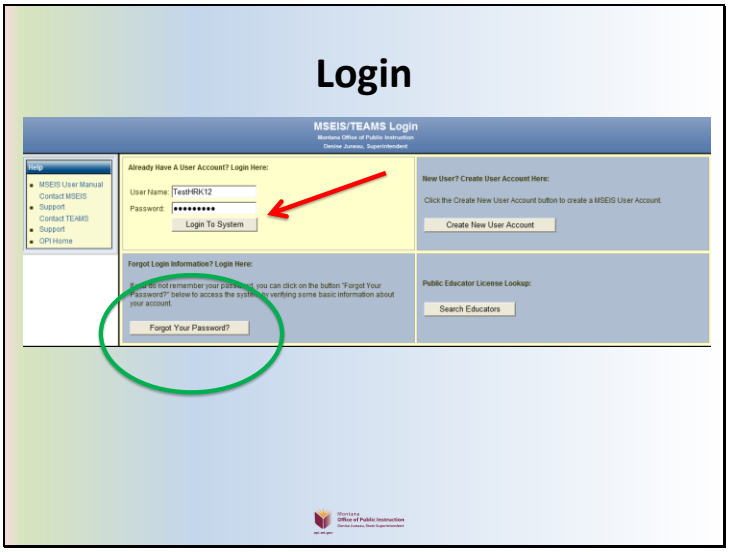
The TEAMS system will be used for several data collections. The first 2 modules to open will be the SEID generator and the TOE data collection. Later in the fall, OPI will open the next module, the TEAMS Annual Data Collection. This module replaces the old ADC, or annual data collection, that OPI used to collect. In general, the data collected in the new TEAMS Annual Data Collection is much the same as the data that was collected in the old ADC, but in a different format. This presentation focuses on the SEID Generator and Terms of Employment (TOE) collection.

Slide 6



The TEAMS system requires a username and password. To set up access, the Authorized Representative or AR, of your district, coop, nonpublic accredited school, or treatment center (I'll just call this your "organization") must submit a TEAMS Security Form to OPI to designate who should be allowed to enter and submit the data for the organization. For the SEID and TOE collection, the organization has told OPI who to set up with "TEAMS Human Resources" rights. This is a person with access to the organization's payroll or HR information so they can enter SEID requests (which require names, social security numbers and birthdates) and TOE information, which requires contract information on each employee. When TEAMS is opened, OPI will email each user with a username and password for TEAMS.

Slide 7



To login, click the link in the username/password email to go to the URL of the Login page. You can also find this link on the School Staffing website shown in an earlier slide.

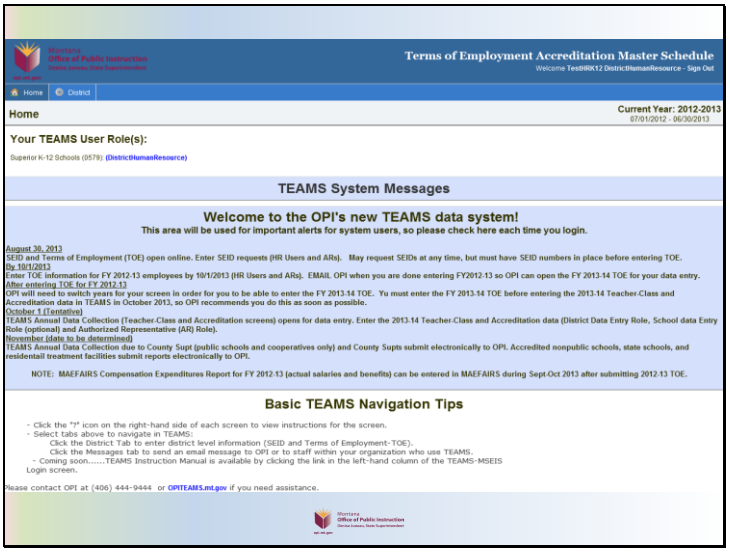
Enter you username and password, then click "Login to System."

Notice – below the login box, if you forgot your password there is button to click that allows you to reset it. You can only do that AFTER you have logged in for the first time and chosen a password.

Slide 8

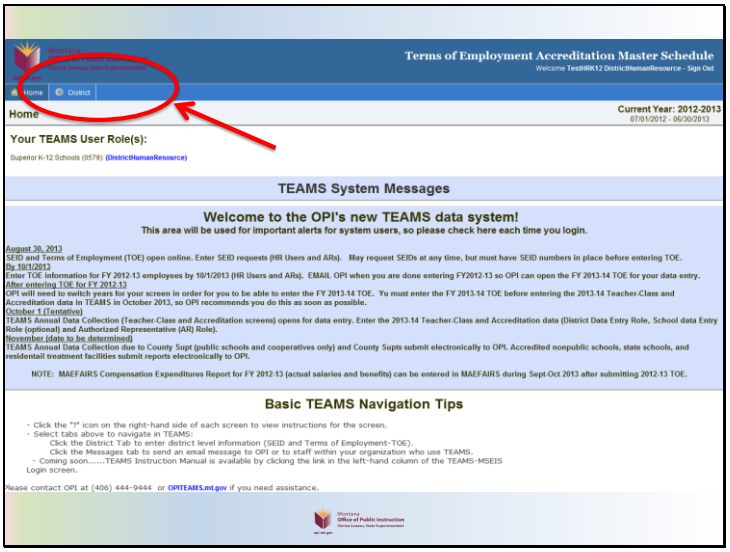
After entering the username and password, you'll be taken through several steps to choose your own password. In the email that OPI sends you with your Username and Password, you will find a list of steps you must follow when you first login to TEAMS. PLEASE follow those instructions because they give you the default answers to secret questions that you'll need to know when you first login! This is a one-time process….You will not be taken through that process the next time you login to TEAMS.

Slide 9



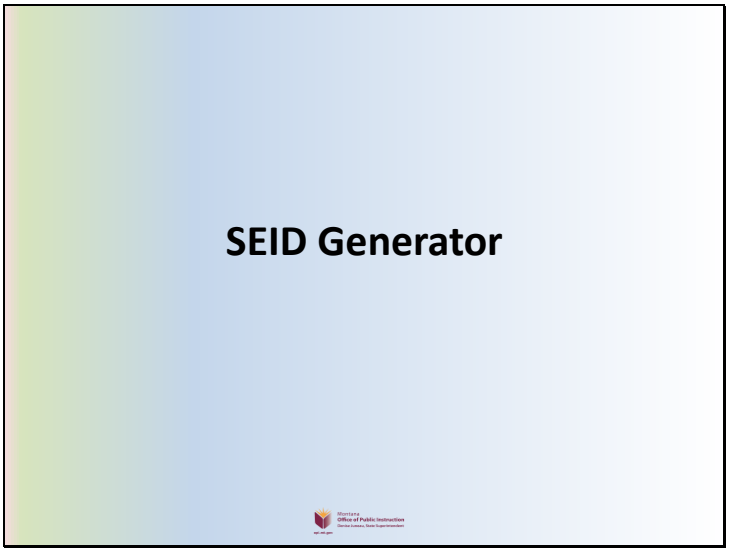
This is the TEAMS HOME screen. In the middle of the page is an area for TEAMS system messages. OPI will use this section for important messages to users, including pending due dates. Be sure you check here each time you login.
On the bottom of the screen, you'll find some basic navigational instructions about using TEAMS screens. I'll show you those navigational tips in this presentation.
Toward the top of the screen, your user roles are listed. Some users will have only one role and others may have several roles. Your roles determine which screens you can access and what data you are allowed to enter and change. If you are responsible for more than one organization, such as an elementary and high school district, or a set of districts and a cooperative, you'll see those listed. You can toggle between your roles by clicking on the blue links.

Slide 10



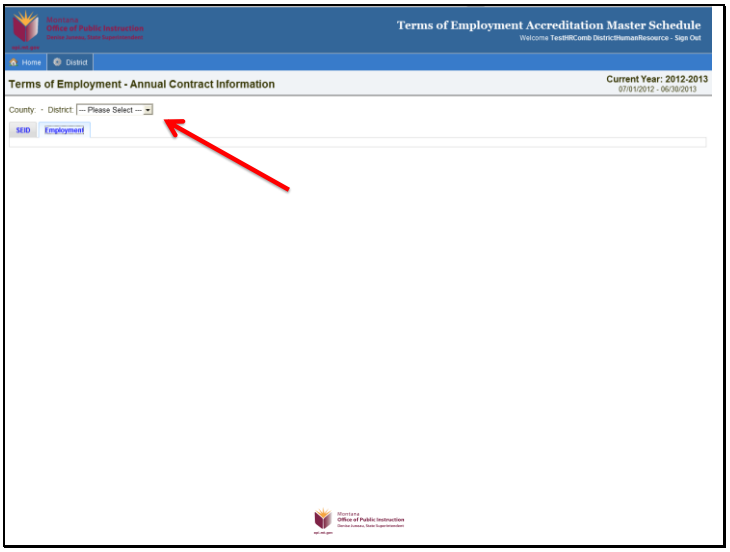
From the HOME screen, click the District tab to enter data.

Slide 11



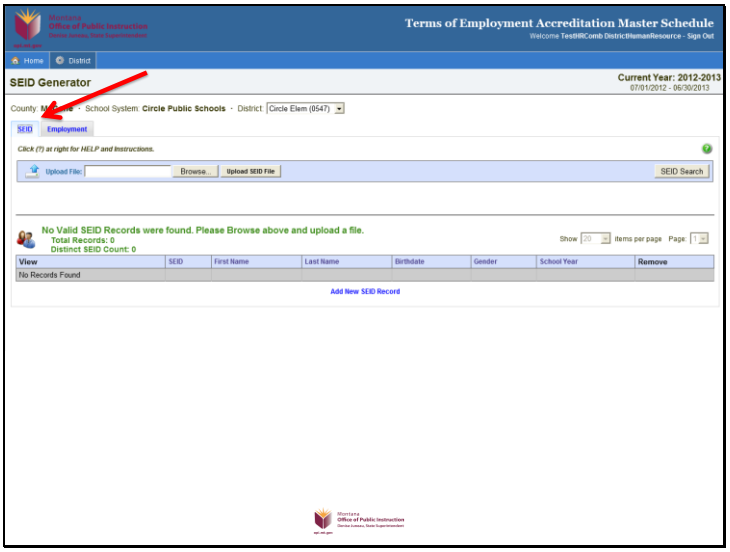
First, we'll cover how to use the SEID generator.

Slide 12



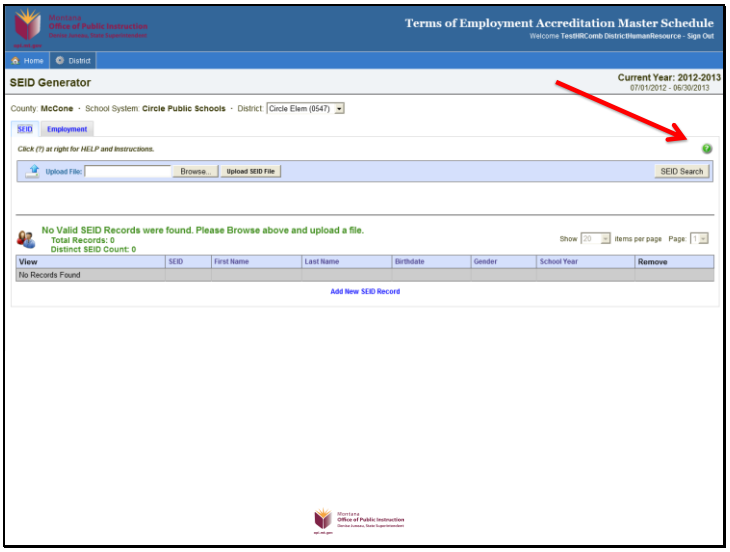
On the District tab, you'll see the SEID subtab and Employment (TOE) subtab. If you are responsible for more than one organization, such as an elementary and high school district, multiple elementary districts, or a school district and cooperative, you'll need to select the county and district, or organization, from the pull down menu. If you only have one organization, this will automatically open with that entity chosen.

Slide 13



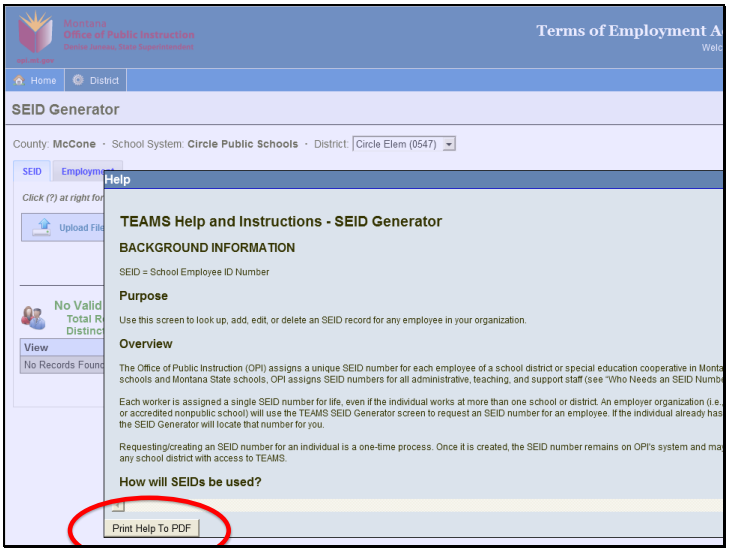
After you've selected you district, the SEID subtab will open. I want to show you the features of the SEID screen. As you know this screen is used for requesting the SEID, or School Employee ID number, for your employees. You can find more information about SEIDs on the School staffing webpage. AND, we have information and instructions on each screen. So here's the first feature—how to find HELP and instructions on TEAMS.

Slide 14



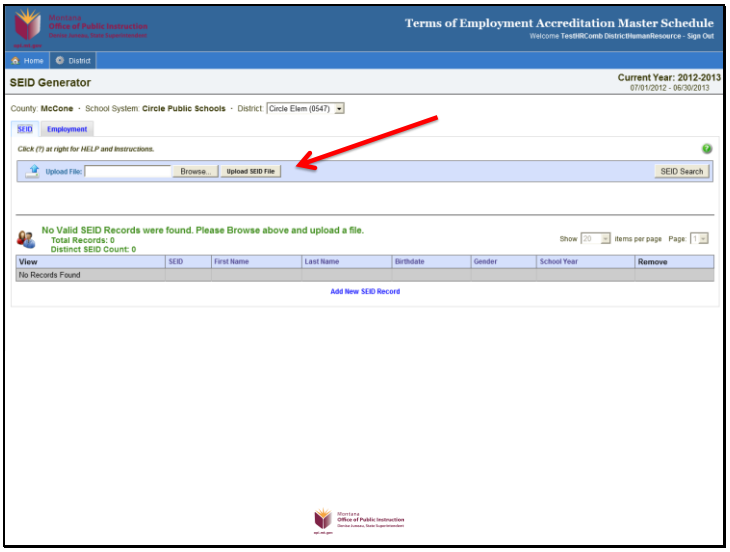
On each screen, on the right hand side, you'll find a green button with a question mark. Click on the button to find help and instructions for the screen. Here's an example of the help text you'll find.

Slide 15



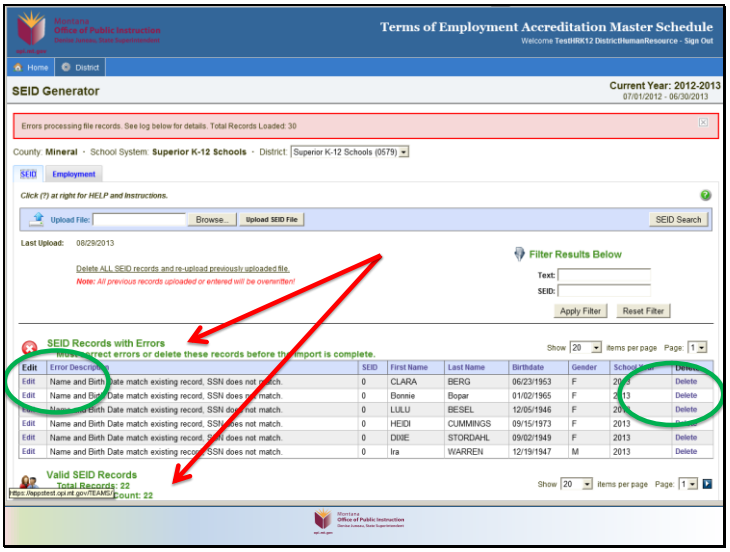
The help text covers an overview and background information to help you understand the data to enter, and it gives specific directions about how to add, edit, delete, and submit data. Note that you can print the document to a PDF and save it or print it for easier use. Click the red "X" at the top of the help screen to go back to the main screen.

Slide 16



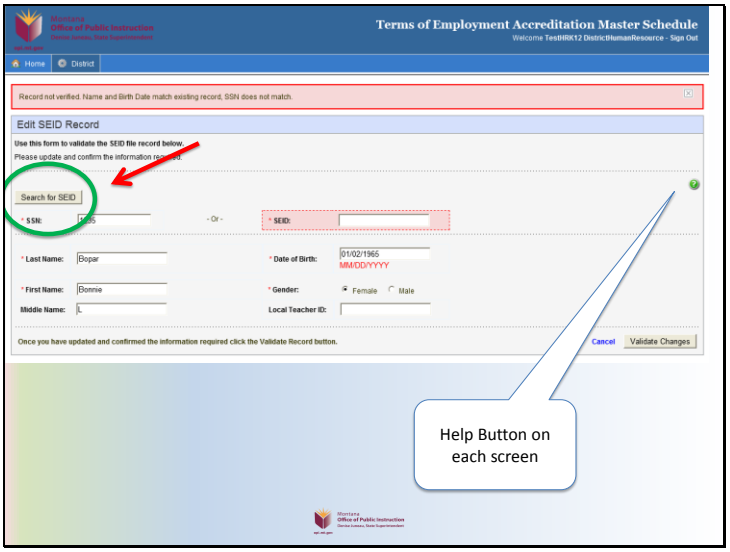
There are two ways to enter SEID requests for your employees. You can upload a file or you can enter a single request manually, one at a time. I'll show you both ways. To upload a file, you'll have to prepare an SEID file that conforms to a required format and contents. Many accounting software vendors have already developed a method to help you create an SEID file from your payroll system. Check with your vendor for more information. Alternatively, you can use an Excel template OPI can provide. Either way, the file MUST be in the proper format and MUST be saved as a dot-CSV or a dot-TSV file from Excel. Click the browse button to choose the SEID file you want to upload from your computer. The file name will show in the Upload File box. The click the Upload SEID button to load the file. A timer appears to show you it's loading. The loading might take a minute for larger schools but should only take seconds for smaller schools. If for any reason it takes a very long time loading, please contact OPI for assistance.

Slide 17



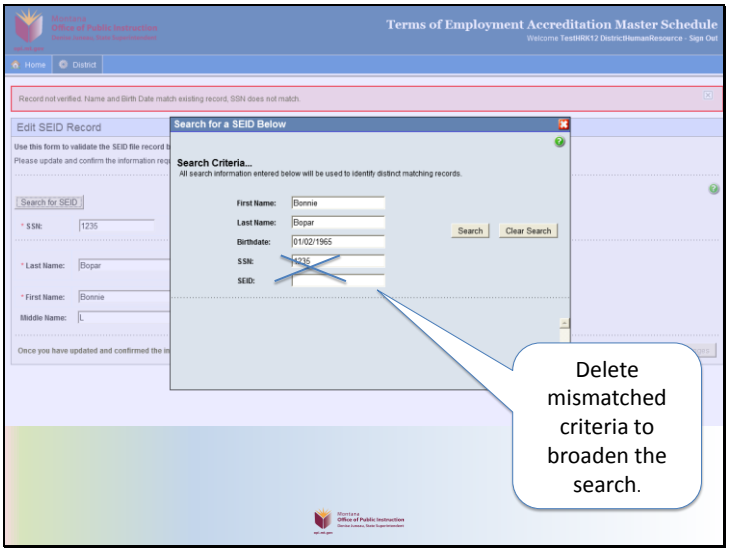
When you've uploaded an SEID file, the pink box at the top of the screen tells you how many records were imported. Make sure this count is correct, to avoid losing any records. You'll see several tables on the screen. The SEID Records with Errors table lists records that either need more information to create an SEID or require clarification to know if it's the same person that OPI already has an SEID. This will occur when a name, last 4 digits of a social security number, or a date of birth match existing records….it wants you to confirm the identity of the person. Click the edit button at the left of a record to alter it or click the delete button at the right of the record to delete it. If you click "edit" here is what you'll see.

Slide 18



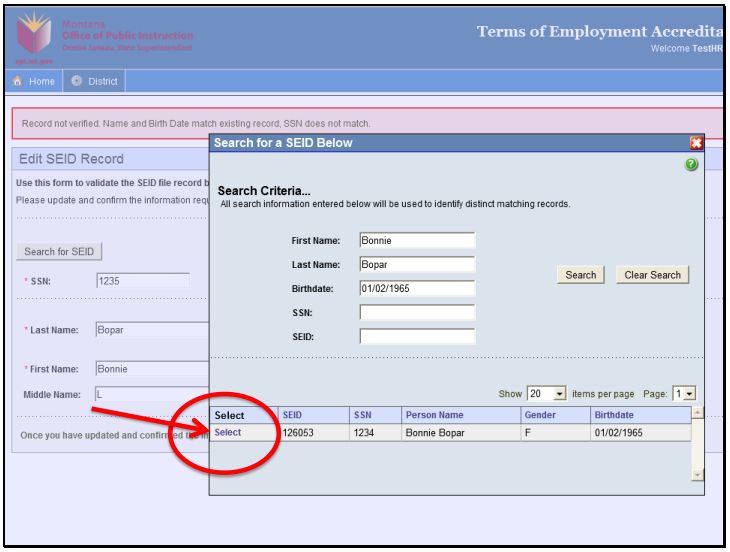
This is the Edit SEID Record screen. Notice the green help icon appears on this screen, so you can find help on every individual screen. The pink box at the top of the screen tells you what to fix. In this case, the name and date of birth match an existing record, but the SSN doesn't match so it's trying to clarify whether this is an error or whether it's actually a different person. You can the SEID files to clarify the information. Click Search for SEID.

Slide 19



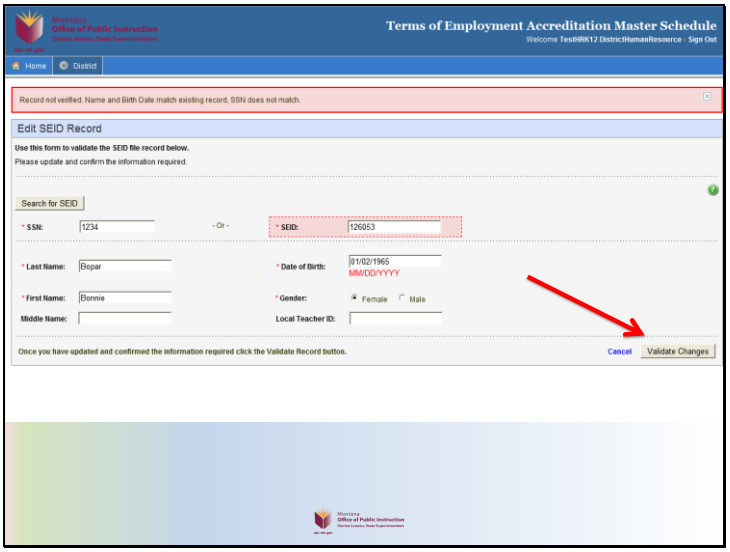
This is the SEID Search screen. To use it, enter or delete the search criteria to find existing SEID records for people you're looking for. In this case, the info entered doesn't match the SSN, so I want to see people with the same name and birthdate, since one of them might be the person I'm looking for. Since I want to see people with the name and date of birth I'm looking for, I'll remove the SSN from the criteria and click Search. Likewise, if it was mismatching on date of birth, you'd want to remove date of birth and then search. If it was mismatching on name, remove the first or last name and click search. When you click search……

Slide 20



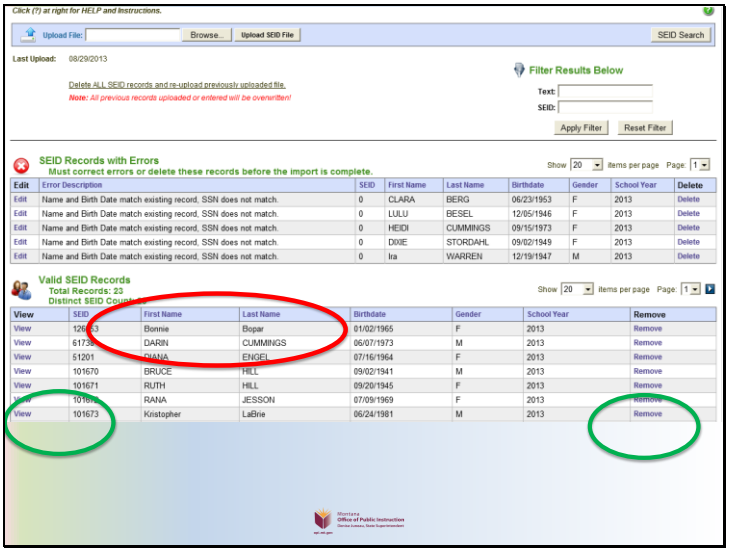
The Search feature locates the potential matches who already have SEID on the system. Sometimes there are many partial matches for a name and sometimes only a few. If one of them matches the person you want, click <Select> to bring the record into your edit screen.

Slide 21



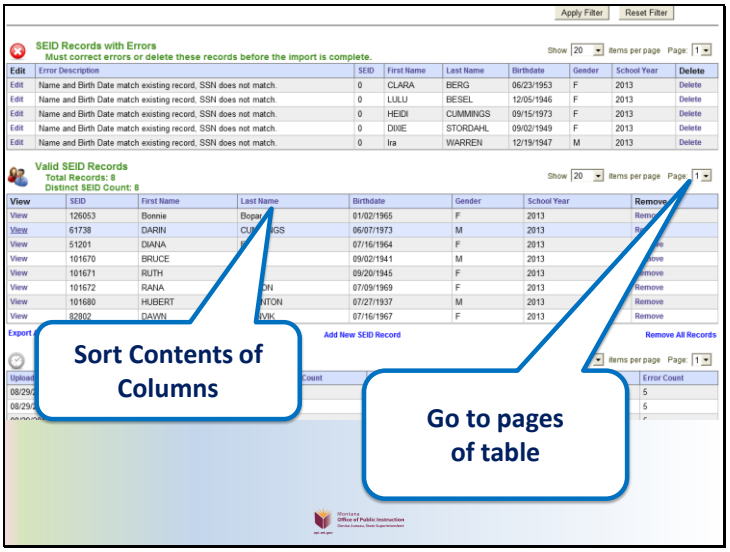
Selecting the record brings it into the edit screen and shows you the SEID number. Click "Validate Changes" to save the record.

Slide 22



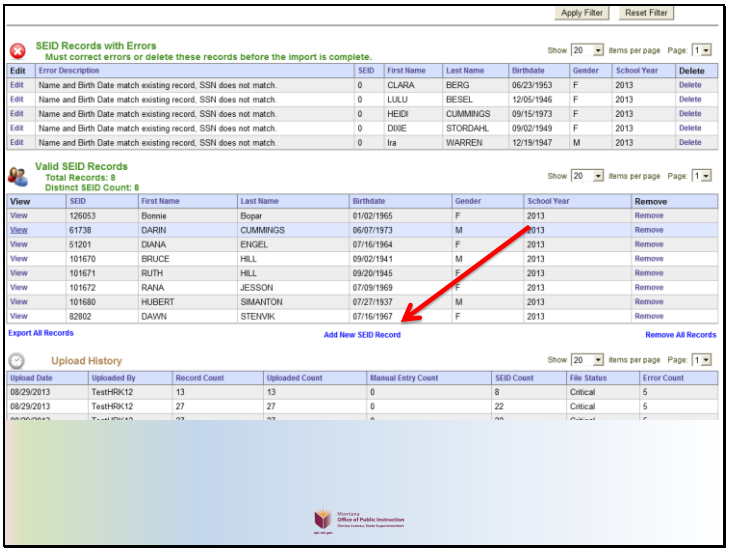
With the record edited and validated, it will bring you back to the main SEID screen. The record now shows up in the Valid SEID Records list, meaning the SEID is established and listed on your SEID list. You'll need to edit or delete every record from the SEID Records with Errors table to be sure you have an SEID for each employee. You can edit a record from the Valid SEID Records list ONLY if you JUST added it and haven't closed your session. After you close your TEAMS session by logging out, you can't edit the valid record anymore. That's because once TEAMS adds an SEID, it is available on the system for use by any organization who employs that person, so it can't be changed. Likewise, you can remove a valid record from your screen, but the record remains at OPI. If you think a record needs correction or removal, please contact OPI.

Slide 23



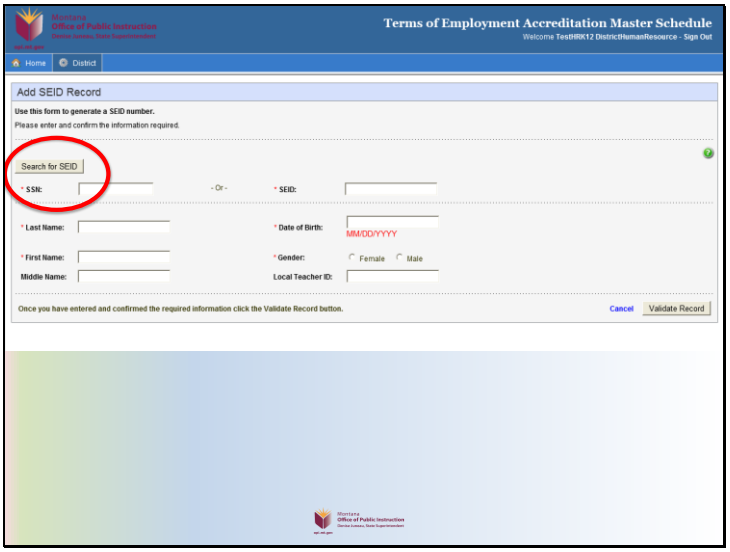
A couple of tips on using tables in TEAMS…..First, you can sort the columns of tables by clicking on the column headers. Click to sort names alphabetically or reverse alphabetically, or click numeric columns to sort smallest to largest, etc. Second, the tables may have multiple pages of records. Navigate through the pages by clicking the page number box and click a page number on the list.

Slide 24



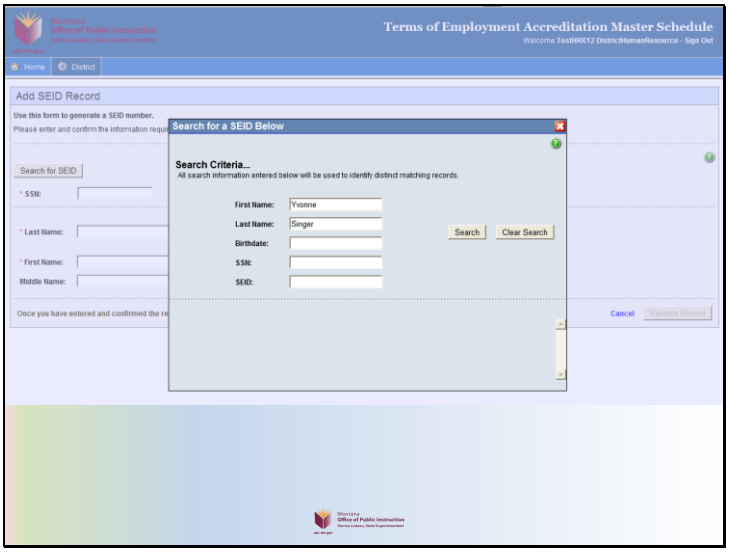
To add a record manually, look for the ‘‘Add New SEID Record’’ button under the Valid SEID Record table. Click to add a new SEID request record.

Slide 25



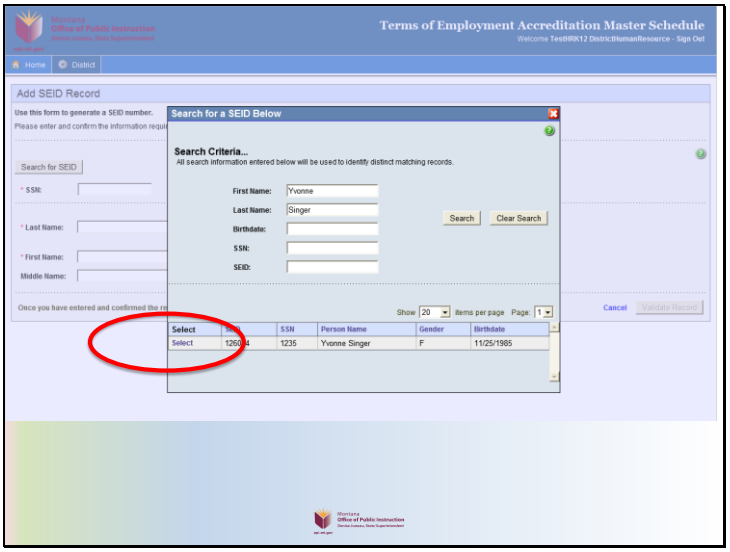
This is the Add SEID Record screen. If you think the person already has an SEID from previous employment at another district, you might use the Search feature to find the persons' existing SEID. Here's how that works. Click Search for SEID.

Slide 26



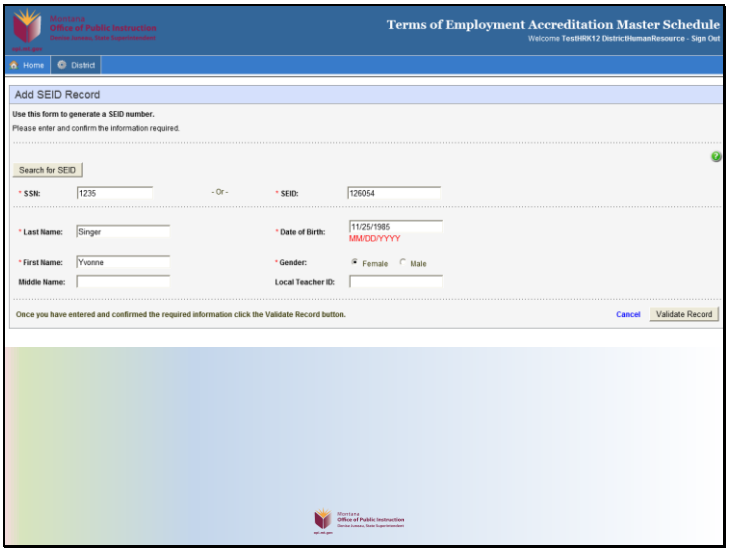
The SEID Search screen opens. Enter the first and last name of the person you're looking for. Let's say for example that I'm looking for Yvonne Singer. Enter the name and click search.

Slide 27



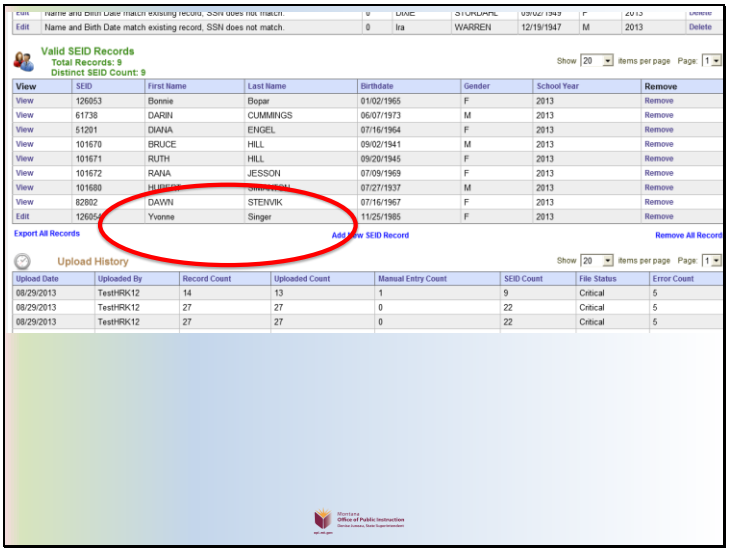
There may be many potential matches for a common name, or just a few. If there are none, you'll know the person doesn't have an SEID yet so you can return to the Add a SEID Record screen to finish entering the SSN and date of birth. If a suggested match appears here, confirm the SSN and date of birth, then click Select to bring the SEID into your Add screen.

Slide 28



The selected record appears in the Add screen, along with the SEID. Click Validate Record to save and return to the SEID main screen.

Slide 29



Edit	Name and Birth Date match existing record, SSN does not match.	8	DANE	STROUPAPE	03/02/1949	F	2013	Delete
Edit	Name and Birth Date match existing record, SSN does not match.	8	Ira	WARREN	12/19/1947	M	2013	Delete

Valid SEID Records
Total Records: 9
Distinct SEID Count: 9

Show 20 items per page Page: 1

View	SEID	First Name	Last Name	Birthdate	Gender	School Year	Remove
View	126053	Bonnie	Bopar	01/02/1965	F	2013	Remove
View	61738	DARIN	CUMMINGS	06/07/1973	M	2013	Remove
View	51201	DIANA	ENGEL	07/16/1964	F	2013	Remove
View	101670	BRUCE	HILL	09/02/1941	M	2013	Remove
View	101671	RUTH	HILL	09/20/1945	F	2013	Remove
View	101672	RANA	JESSON	07/09/1969	F	2013	Remove
View	101680	HUBERT	[illegible]	07/27/1937	M	2013	Remove
View	82802	DAWN	STENVIK	07/16/1967	F	2013	Remove
Edit	126054	Yvonne	Singer	11/25/1985	F	2013	Remove

Export All Records Add New SEID Record Remove All Records

Upload History

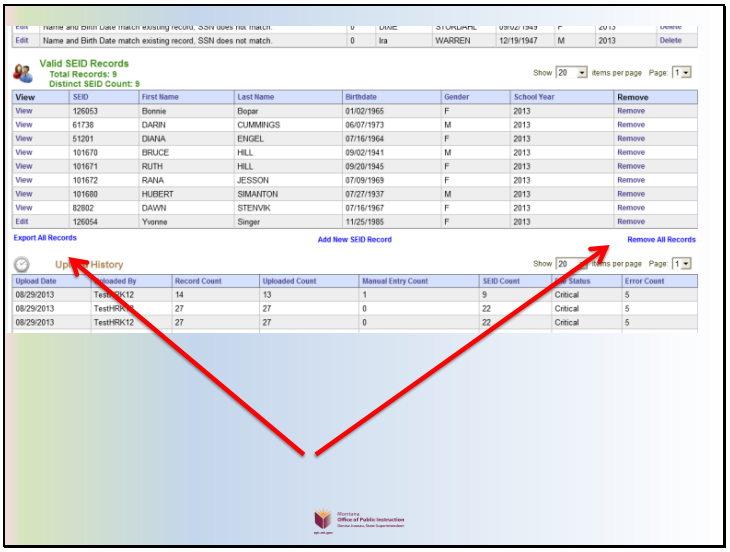
Show 20 items per page Page: 1

Upload Date	Uploaded By	Record Count	Uploaded Count	Manual Entry Count	SEID Count	File Status	Error Count
08/29/2013	TestHRK12	14	13	1	9	Critical	5
08/29/2013	TestHRK12	27	27	0	22	Critical	5
08/29/2013	TestHRK12	27	27	0	22	Critical	5

Montana Office of Public Instruction

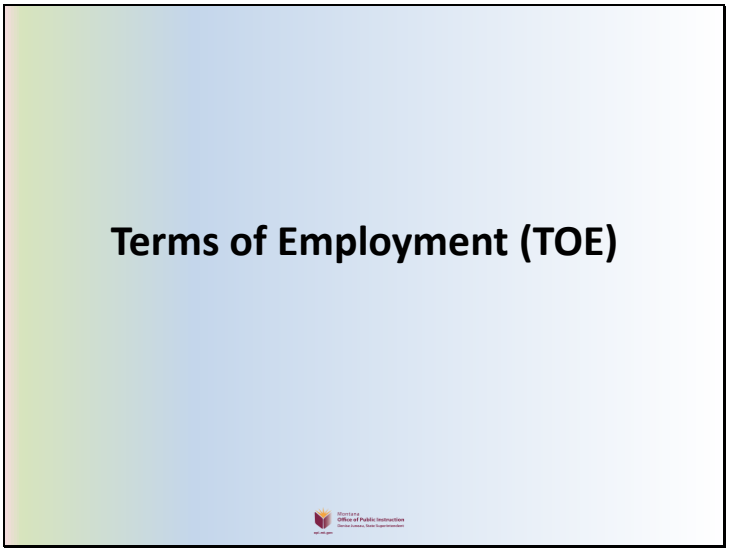
On the main SEID screen, the record now appears as a valid SEID record.

Slide 30



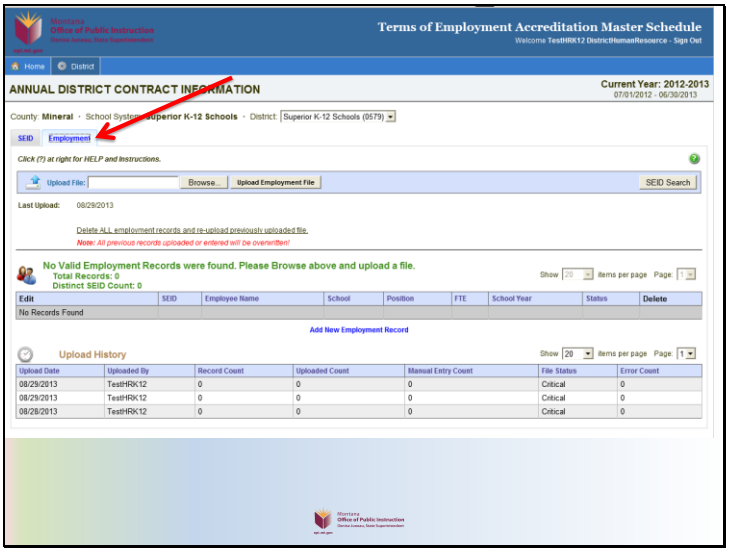
Also on the main SEID screen, notice on the right hand side of the screen you can Remove all Records, which wipes all SEID records off your screen if you prefer to start over. On the left hand side, you also have an option to Export all Records. This creates an Excel file that you can use to import your new SEID list back into your accounting/payroll software, or you can just save it.

Slide 31



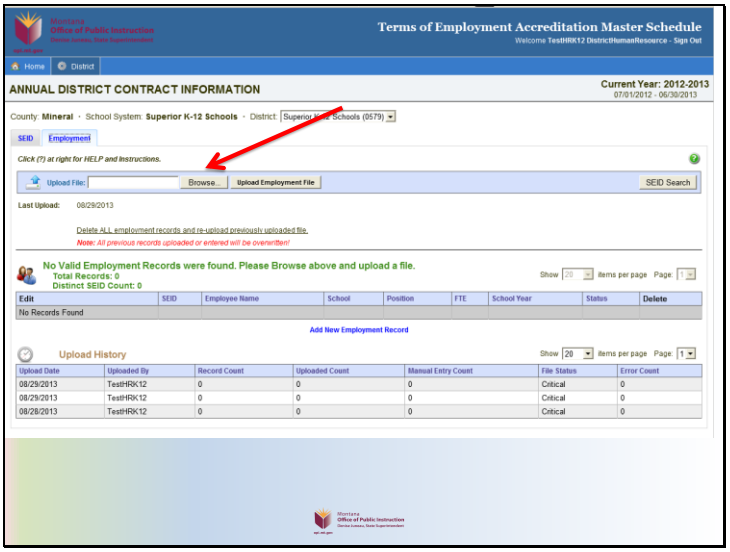
Next, we'll cover how to enter data on the TOE screen.

Slide 32



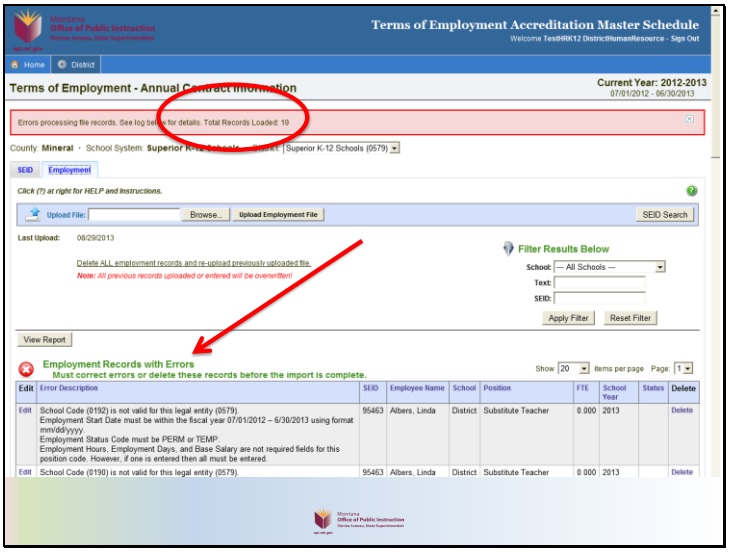
Remember under the District tab how you selected the SEID subtab? Next to that is the Employment subtab. Click here to open the TOE screen. If necessary, select the district from the pulldown screens right above the subtabs. The TOE screen has the same general features of the SEID screen, so once you've seen one you've pretty much seen both!

Slide 33



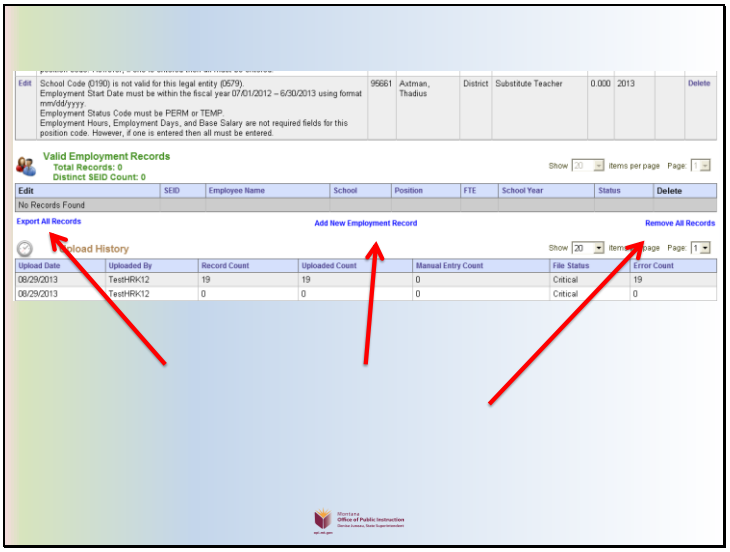
The TOE screen allows you to upload a TOE file or add single TOE records, one at a time. Browse and select your TOE file, then click Upload Employment File. Again, this file must be in the required format and have all required data. Contact your accounting software vendor to ask whether your software creates the TOE file, and if so, how to do that. If the software doesn't provide that feature, you'll need to create the TOE file yourself or enter each record one at a time. There is a link at the end of this presentation to a document on the web that explains more about what to data to report on the TOE.

Slide 34



Just like the SEID screen, the TOE screen shows a pink box that tells you how many records were imported. Check this against your import file to make sure no records have been omitted. Just like the SEID screen, there will be a table of records with errors at the top and a valid records table lower on the screen. You can leave the screen and return to correct errors in another session, but you'll need to edit/correct or delete all records with errors in order to save the records as valid records. Error TOE records are not yet submitted to OPI. Valid records are saved at OPI. Notice the same type of edit and delete buttons at the side of each record. Valid records have the same buttons. This is very similar to the SEID screen so it should seem familiar, so I won't cover examples of those processes.

Slide 35



Also like the SEID screen, the Add New Employment record appears in the middle underneath the valid records table. To the left and right, you can click to export all records to excel or to remove all records from your TOE submission. Removing TOE records will remove all this year's saved TOE records from OPI's records, so use it with caution.

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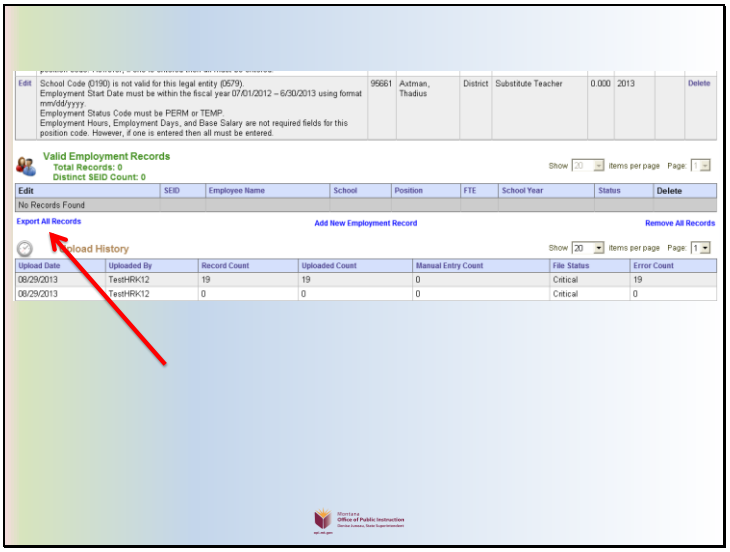

Here's a tip about the Export feature on the TOE: If your accounting software doesn't create a TOE file to upload, OPI recommends you click Export All Records and save this file to use as an import file next year. You might find it easier to edit this file to add and adjust for people's contracts and positions in the next year, instead of recreating the whole TOE using manually added records! Contact OPI if you'd like more information. That's all there is to cover on the TOE.

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A few cautions…..

- When uploading an SEID file or TOE file, TEAMS will write over all previously uploaded or added records.
  - Valid SEID numbers will remain on OPI's files
  - SEID records with errors will be erased
  - TOE records entered thus far for the year will be erased

Finally, a few cautions….. If you have already uploaded an SEID or TOE file, use some care in re-uploading another file. You'll overwrite the records previously uploaded or added, including any edits you've done on the screen. There is, however, a popup message to ask for confirmation before it re-uploads a file.

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A few cautions…..

- TOE records are year-specific
  - Be careful to choose correct year on your software used to create a TOE file!

Toe records are year-specific. If your accounting software creates the file, be sure to choose the correct year so the file is coded with the year and will upload correctly. TEAMS will reject a file coded with the wrong year, but it will save time to avoid the problem if you can!

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For more info….

- Terms of Employment (TOE) -Explains details of reporting
  - http://www.opi.mt.gov/pdf/SchoolStaffing/EmploymentTerms.pdf
- OPI Contacts:
  - TEAMS HelpDesk (406) 444-9444
  - OPITEAMS@mt.gov

You can get more information on the School Staffing website. The link shown here is a great resource to learn about the TOE collection. Please contact the OPI TEAMS Helpline at (406) 444-9444 or email to OPITEAMS@mt.gov. We'll be happy to help you with questions. Thank you!