

Preparing for the October-December 2016 (OD16) Quarter!

As summer break has officially come to an end, PCG would like to share some important information and key updates through this month's bulletin which includes Random Moment Time Survey (RMTS) general updates, system changes, and tips for success.

General Updates

PCG Claiming System User Guides

PCG worked diligently to update the existing system user guides and was able to release them sooner than the anticipated timeline of late August. With the release of updated system user guides in early August, LEA coordinators as well as LEC/LGA coordinators may now reference the user guides in preparation for the upcoming quarter (OD16) as well as throughout the new fiscal year. Please keep in mind that LEA coordinator guides have been placed under the 'Resource' section of the home screen on each PCG Claiming System site. The LEC/LGA user guide as well as the Coder user guide has been distributed via email to all LEC and LGA coordinators. Please feel free to reach out to PCG with any additional questions regarding the updated user guides.



System Updates

Preserved SPL History and Master Sample File

Effective OD16 the **SPL History Preserved** and **Master Sample Preserved** reports can be generated at any time throughout a quarter to display the preserved file for audit purposes. Both reports were created to help capture a snapshot of each quarter's staff pool list (*SPL Preserved*) and sampled moments (*Master Sample Preserved*) at the time of sample generation. Unlike the current *SPL History* report and *Master Sample File*, the new preserved reports will **not** update throughout the quarter. PCG would also recommend utilizing the *SPL History Preserved* report to help identify vacancies and/or replacements that have occurred throughout the quarter as well as dates associated with these changes. When conducting this search, it is beneficial to reference the unique job position ID assigned to each position.

Tips



Non-Participating Agencies / Condensing Agencies

Please follow one of the two steps below to un-certify agencies who **will not** be participating in an upcoming quarter. **Please note that each LEA coordinator(s) for non-participating agencies must be removed as a Claiming System user accordingly.**

Unlocking / Un-Certifying an Agency:

The steps below will aide in unlocking/un-certifying TSP lists that will not be included in the sample generation. After all LEAs have been certified at the

LEC/LGA level please follow the steps below to properly “inactivate” a non-participating agency:

1. Using the ‘State’ dropdown menu, select the specific LEA who will not be participating in the upcoming quarter
2. Go to the Staff Pool Positions screen and click the ‘Unlock Staff Pool’ button



3. Repeat steps above if there are multiple agencies not participating in the upcoming quarter
4. Drill back up to the consortia/regional level to confirm all non-participating LEAs are uncertified using one of two ways:
 - Go to the Staff Pool Positions screen and click on the LEA drop down menu. The uncertified LEAs will be listed as ‘Ready for certification’
 - Generate the SPL Certified / Uncertified report and filter by ‘No’ in the ‘Certified’ column
5. Once you have confirmed all non-participating LEAs are uncertified, go to the Staff Pool Positions screen and click the ‘Approve All Staff Pools’ button



Removing TSPs from Non-Participating Agencies:

The following steps can also be used as another method to properly “inactivate” a non-participating agency:

1. Upon preparing for an upcoming quarter, In the current quarter, drill down to the agency that will no longer be in participating

2. Go to the People> Staff Pool Positions screen and select ‘Export’ and open the Excel spreadsheet of the TSP list



3. In the Excel spreadsheet add the following information:
 - ‘EndDate’ (column T) - place an end date of the last day of the current quarter (i.e. 9/30/16) for all TSPs in the spreadsheet
 - ‘Inactivate’ (column U) - place a ‘Y’ for all TSPs in the spreadsheet
4. Save the Excel spreadsheet to your desktop
5. On the People>Staff Pool Positions screen, select ‘Import’



6. Select ‘Browse’ to locate the Excel spreadsheet on your desktop and click ‘Upload’
7. If the import was successful, check off the box and select ‘Confirm’ to complete the import. If errors were found, select ‘Cancel’ and correct the errors found on the import screen prior to re-importing

Condensing Multi-Calendar or Multi-Track Agencies:

The following steps will aide in condensing a multi-agency district into one through the Import/Export tool:

1. To remove the TSPs and “inactivate” the agency that will no longer be in use, perform steps 1-7 found above
2. In the upcoming quarter, drill down to the agency that will be used moving forward
3. Go to the People> Staff Pool Positions page and select ‘Export’ and open the Excel spreadsheet
4. Use the Excel spreadsheet that was saved to your desktop (step 4 above) and copy over all TSPs to the newly exported spreadsheet. **Keep in mind**

new positions must be added to the bottom of file

5. For each TSP that was copied over to the newly exported spreadsheet, you will need to add/update the following information:
 - 'Agency.Name' (column B) - update to read the new agency name
 - 'JobSpanID' and 'JobPositionID' (columns D and E) - **remove all previous information relative to the previous agency** so that these columns are left blank as required for all newly added TSP
 - 'ShiftType.Name' (column I) - ensure all newly added TSPs are assigned an exact shift name that exists for the new agency
 - 'NewPerson' (column P) - place a 'Y' for all newly added TSP
 - 'BeginDate' (column S) - place a begin date of the first day of the upcoming quarter (i.e. 10/1/16) for all newly added TSP
6. Save the newly exported spreadsheet to your desktop and following the same steps listed above on page two (steps 5 through 7 under 'Removing TSPs from Non-Participating Agencies') in order to import the spreadsheet

For additional assistance in this process, please feel free to contact PCG through the dedicated calec@pcgus.com or calga@pcgus.com email address or by the PCG toll free RMTS helpdesk number (866) 803-8825. You may also reference the section '**Exporting and Importing the TSP**' found in the LEA user guide for additional information on add or removing TSPs through the import/export tool.

Annual School Year Calendar

The following outlined steps will need to take place prior to updating or certifying the October-December quarter (Q2) calendars upon each new fiscal year. LEC/LGA coordinators are required to first identify and

select all federal holidays at the regional or consortia level and certify the school year calendar within the July-September quarter (Q1). LEA coordinators will then be required to identify each additional non-student attendance day at the LEA level on the calendar and certify the school year calendar within the July-September quarter (Q1). In addition, the LEC/LGA coordinator must approve all calendars in Q1 once each LEA coordinator has completed steps one and two below. **Please note that these steps below must be completed prior to the LEA coordinators certifying their Q2 calendar.**

1. In the July-September quarter (Q1), select each holiday and/or non-student attendance day for the entire upcoming school year (August – July)
2. Select 'Save Changes' and then 'Certify Calendar' once the entire school year calendar has been completed

Each new quarter of every fiscal year, coordinators will be required to review previously certified calendars and select 'Certify Calendar' if no changes have been made to their school calendar, or make revisions as necessary to any upcoming/future months.

Provided below is a link which can be used at any time to view a short instructional recording on the new Annual School Year Calendar certification process:

<https://pcgus.webex.com/pcgus/lsr.php?RCID=0c1fc1566a574783a8374161ff7eaa3f>