

Louisiana Believes

**CIS Training:
New/Transferring Personnel Procedures,
Modifying Records, and Assigning Evaluators**

This Training Includes:

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

LEA vs Site Level Access

School Session: ▼

LEA: ▼

School: ▼

Last Name Filter:

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

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

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

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

Who can Modify Records in CIS?

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

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

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

Using Security to Search for New Personnel

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

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

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

The screenshot displays the COMPASS INFORMATION SYSTEM interface. At the top, there is a navigation bar with the 'Security' tab selected. Below the navigation bar, there is a search area with dropdown menus for 'System' (set to 'HCS-Human Capital Information System') and 'School District' (set to 'Ascension Parish Statistics'). To the right of these dropdowns, there is a list of user roles and their counts: 0 : HCS LDE ADMINISTRATOR, 0 : HCS LDE STAFF, 12 : HCS LEA ADMINISTRATOR, 90 : HCS SUPERVISOR, 14 : HCS EVALUATOR, and 1,616 : HCS EMPLOYEE. Below this list, there is a section for 'Selection Criteria for Account List' with input fields for 'Last Name' (smh), 'First' (Johnathon), 'SSN', 'Login Code', 'Status', and 'User Group'. There are also dropdown menus for 'Last Successful Login Date', 'Successful Login Count', and 'Unsucc. Login Cnt'. A 'Go' button is located to the left of the 'Last Successful Login Date' dropdown. At the bottom of the search area, there is a section for 'Account List' which is currently blank.

Using Security to Search for New Personnel

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

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

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

The screenshot displays the COMPASS INFORMATION SYSTEM interface. At the top, there is a navigation bar with the 'Compass' logo and the text 'COMPASS INFORMATION SYSTEM'. Below this is a menu with options: Security, Employee, VAM, Eval Assign, PGP, SLT, Observation, Evaluation, Report, To Do List, and Links. The 'Administer' tab is selected.

The main content area shows search filters for 'System' (HCS-Human Capital Information System) and 'School District' (Ascension Parish Statistics). Below these are statistics for various account types:

1,657 : Active Accounts	1,655 : Active, not accessed past year	0 : HCS LDE ADMINISTRATOR
4 : De-activated Accounts	4 : De-activated, not accessed past year	0 : HCS LDE STAFF
71 : Unused Accounts	58,139 : Successful logins	12 : HCS LEA ADMINISTRATOR
1,732 : Total Accounts	19,448 : Unsuccessful logins	90 : HCS SUPERVISOR
	0 : Unsuccessful Registration Attempts Today	14 : HCS EVALUATOR
		1,616 : HCS EMPLOYEE

Below the statistics is the 'Selection Criteria for Account List' section, which includes input fields for Last Name (Adams), First (Barrett), SSN, Login Code, Status, and User Group. There are also dropdown menus for Last Successful Login Date, Successful Login Count, and Unsucc. Login Cnt. A 'Go' button is present.

The 'Account List' section shows a table with the following data:

Last Name	First Name	LEA	Site	SSN	User Group	Last Login	# Logins	# Unsucc. Attempts	Status A=Active; D=De-activated
ADAMS	BARRETT	003	003017	000000008	HCS_EVALUATOR				

Using Security to Reactivate an Account

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

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

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

The screenshot displays the COMPASS INFORMATION SYSTEM interface. At the top, there is a navigation bar with the 'Compass' logo and the text 'COMPASS INFORMATION SYSTEM'. Below this is a menu bar with options: Security, Employee, VAM, Eval Assign, PGP, SLT, Observation, Evaluation, Report, To Do List, and Links. The 'Administer' tab is selected.

The main content area shows the following configuration and statistics:

- System: HCS-Human Capital Information System
- School District: Ascension Parish Statistics

Account Statistics:

1,657 : Active Accounts	1,655 : Active, not accessed past year	0 : HCS LDE ADMINISTRATOR
4 : De-activated Accounts	4 : De-activated, not accessed past year	0 : HCS LDE STAFF
71 : Unused Accounts	58,139 : Successful logins	12 : HCS LEA ADMINISTRATOR
1,732 : Total Accounts	19,448 : Unsuccessful logins	90 : HCS SUPERVISOR
	0 : Unsuccessful Registration Attempts Today	14 : HCS EVALUATOR
		1,616 : HCS EMPLOYEE

Selection Criteria for Account List:

Last Name: First: SSN: Login Code: Status: User Group:

Last Successful Login Date: Successful Login Count: Unsucc. Login Cnt.:

Account List:

Last Name	First Name	LEA	Site	SSN	User Group	Last Login	# Logins	# Unsucc. Attempts	Status A=Active; D=De-activated
ADAMS	BARRETT	003	003017	000000008	HCS_EVALUATOR				

How to Add New Personnel

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

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

The screenshot shows the COMPASS INFORMATION SYSTEM interface. At the top, there is a header with the COMPASS logo and the text 'COMPASS INFORMATION SYSTEM'. Below the header, there are several tabs: Security, Employee, VAM, Eval Assign, PGP, SLT, Observation, Evaluation, Report, To Do List, and Links. The 'Employee' tab is selected. Below the tabs, there are two sub-tabs: View List and View. The 'View List' tab is selected. The main content area shows a form for adding a new employee. The form includes the following fields and options:

- School Session: 2018 - 2019
- Mode: Add
- Social Security Number: 00000008 *
- LEA: 003 - Ascension Parish *
- Transfer From LEA: Select One To Indicate Transfer *
- Name: (First) (Middle) (Last) (Suffix) *
- Job Title: *
- District Employee Hire Date:
- Certified Evaluator? Yes No *
- Homebase School: Select One *
- User Group: Select One *
- Reason for Incomplete Evaluation:
- Last Updated: By:
- Buttons: Update, Add, Delete, Cancel

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

How to Add New Personnel

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

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

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

The screenshot displays the COMPASS INFORMATION SYSTEM interface. At the top, there is a navigation bar with the 'Compass' logo and the text 'COMPASS INFORMATION SYSTEM'. Below this, there are several tabs: Security, Employee (selected), VAM, Eval Assign, PGP, SLT, Observation, Evaluation, Report, To Do List, and Links. Under the 'Employee' tab, there are sub-tabs: View List, View (selected), Maintain, Request Score Invalidation, and Report Grievance. The main content area shows a form for an employee record. The 'School Session' is set to '2018 - 2019'. The 'Social Security Number' field contains '00000000'. The 'LEA' is set to '003 - Ascension Parish'. The 'Transfer to LEA' dropdown is set to 'Select One To Indicate Transfer'. The 'Name' fields are filled with 'BARRETT' (First), an empty field (Middle), and 'ADAMS' (Last). The 'Job Title' is set to '04 - Principal/AP'. The 'District Employee Hire Date' field is empty. The 'Certified Evaluator?' radio buttons are set to 'Yes'. The 'Homebase School' is set to '003017 - Adult Education'. The 'User Group' is set to 'Evaluator'. The 'Reason for Incomplete Evaluation' dropdown is set to 'Select one if applicable'. The 'Rationale' field is empty. At the bottom of the form, there is a 'Last Updated' field showing '10/3/2018 10:07 AM' and a 'By:' field. There are four buttons at the bottom: 'Update', 'Add', 'Delete', and 'Cancel'. A red 'Mode: Update' indicator is visible in the top right corner of the form area.

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

How to Transfer Personnel from other LEAS

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

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

The screenshot shows the COMPASS INFORMATION SYSTEM interface. The top navigation bar includes the COMPASS logo and the text 'COMPASS INFORMATION SYSTEM'. Below this, there are several tabs: Security, Employee, VAM, Eval Assign, PGP, SLT, Observation, Evaluation, Report, To Do List, and Links. The 'Employee' tab is selected, and within it, the 'Maintain' sub-tab is active. The form displays the following fields and values:

- School Session: 2018 - 2019
- Social Security Number: 00000008
- LEA: 001 - Acadia Parish
- Transfer From LEA: 003 - Ascension Parish
- Name: (First), (Middle), (Last), (Suffix) - all fields are empty.
- Job Title: (empty dropdown)
- District Employee Hire Date: (empty text box)
- Certified Evaluator?: Yes (selected), No
- Homebase School: Select One (dropdown)
- User Group: Select One (dropdown)
- Reason for Incomplete Evaluation: (empty dropdown)
- Last Updated: (empty text box)
- By: (empty text box)

At the bottom of the form, there are four buttons: Update, Add, Delete, and Cancel. The 'Add' button is highlighted.

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

How to Transfer Personnel from other LEAS

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

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

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

The screenshot displays the COMPASS INFORMATION SYSTEM interface. At the top, there is a navigation bar with the COMPASS logo and the text 'COMPASS INFORMATION SYSTEM'. Below this, there are several tabs: Security, Employee, VAM, Eval Assign, PGP, SLT, Observation, Evaluation, Report, To Do List, and Links. The 'Employee' tab is selected. Underneath, there are sub-tabs: View List, View, Maintain, Request Score Invalidation, and Report Grievance. The 'Maintain' sub-tab is active. The main content area shows a form for adding an employee. The form includes the following fields and values:

- School Session: 2018 - 2019
- Social Security Number: 00000000
- LEA: 001 - Acadia Parish
- Transfer From LEA: 003 - Ascension Parish
- Name: BARRETT (First), (Middle), ADAMS (Last), (Suffix)
- Job Title: 04 - Principal/AP
- District Employee Hire Date: (empty)
- Certified Evaluator?: Yes No
- Homebase School: Lea-level
- User Group: LEA Administrator
- Reason for Incomplete Evaluation: (empty)
- Last Updated: 10/3/2018 10:07 AM
- By: (empty)

At the bottom of the form, there are four buttons: Update, Add, Delete, and Cancel. The 'Add' button is highlighted in blue.

How to Setup Evaluators

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

Two things must be set to be an evaluator:

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

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

COMPASS INFORMATION SYSTEM

View Only Close Restart

Security Employee VAM Eval Assign PGP SLT Observation Evaluation Report To Do List Links

View List View Maintain Request Score Invalidation Report Grievance

School Session: 2018 - 2019 Mode: Update

Social Security Number: 000000008 *

LEA: 003 - Ascension Parish *

Transfer to LEA: Select One To Indicate Transfer

Name: BARRETT * (First) (Middle) ADAMS * (Last) (Suffix)

Job Title: D4 - Principal/AP *

District Employee Hire Date:

Certified Evaluator? Yes No *

Homebase School: 003017 - Adult Education *

User Group: Evaluator *

Reason for Incomplete Evaluation: Select one if applicable Rationale:

Last Updated: 10/3/2018 10:07 AM By: WESTBROOKS1

Update Add Delete Cancel

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

How to Assign Evaluators to Personnel

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

Go to *Eval Assign*:

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

COMPASS INFORMATION SYSTEM

Security Employee VAM **Eval Assign** PGP SLT Observation Evaluation Report To Do List Links

Maintain

School Session: [v]
LEA: [v]
Evaluator Level: LEA School
School: [v]
Evaluator: [v]

Employee Assignments

Employee Homebase School: [v]
Employee Job Title: D1 - Teacher [v]
Assign Evaluation Type: T - Teacher [v]
Select Employee(s) To Assign Evaluator:

Check All
Refresh

Submit

Select an evaluation type.

CIS Personnel Reminders

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

Resources

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

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

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

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