IOWA™

Department of Education

Fall BEDS Staff
User Guide

October 2024

Contents

Errors and Assistance

Contacts

For support or general questions about the Fall BEDS Staff (FBS)application, email Shelly Wolterman at shelly.neese@iowa.gov. Please include your phone number, district/school and any details needed to understand the problem. You may also leave a message at 515-336-3859.

For more specific questions regarding the following content areas, contact the Iowa Department of Education subject matter expert listed below.

Subject	Name	Email	Phone
Endorsements/BOEE	Josh Moser Joanne Tubbs	josh.moser@iowa.gov joanne.tubbs@iowa.gov	515-281-3587 515-281-3611
Teacher Leadership and Compensation	Tom Wood Stefanie Wager	tom.wood@iowa.gov stefanie.wager@iowa.gov	515-326-2147 515-419-2876
Operational Sharing	Ted Bauer	ted.bauer@iowa.gov	515-979-5468
Required Positions	Contact your School Improvement Consultant		

Supporting Documents

This FBS User Guide includes

- A Quick Tour of the Application
- Step-by-Step Instructions for FBS Reporting

In addition to this FBS User Guide, you will also want to refer to:

- FBS Code Sets - Includes positions and assignments with descriptions.
- FBS A-Z Special Topics
- FBS File Layout (For importing data)
- FBS Definitions and Validations
- FBS Teacher Leadership and Compensation
- FBS Reporting Shared Staff

Navigation

This section is for a basic understanding of the FBS application.

The goal of the staff data collection is to monitor a variety of requirements in the Iowa Code, including:

- All licensed/certified staff are highly qualified (credentials are verified with the Board of Educational Examiners – BOEE)
- Specific requirements such as a school nurse in every district and a principal in every building are validated
- Minimum teacher salaries of $33,500 per the Teacher Leadership & Compensation requirements
- Documentation of shared positions across districts for Operational Sharing funding

Access to FBS for New Users

You will need an A&A Account with the State of Iowa

- Not sure if you have an A&A account? Check A&A Account Access
- Know you do NOT have an A&A account? Create an A&A Account

Once you have your A&A Account, go to the Iowa Education Portal and select **My Profile** in the top right corner and request a role as follows:

- Application=EdInfo
- Sub-Application=Fall BEDS Staff
- Role(s)=Fall BEDS Staff Update

For assistance, contact your local Portal security officer or contact the Portal Helpdesk.

When your request is approved, you will find the application link under the EdInfo menu in the Iowa Education Portal.

Home Page Tab

The **home** page is intended for:

- Announcements
- Contact information
- System Status Updates – Please check for known system issues before you seek assistance on a specific instance of the problem and contact customer service only if your specific instance remains after the system wide issue has been resolved.

District Staff Tab

This is the main page for you to do your reporting. Enter the district name OR number in the Search field and hit **Go** if it doesn't automatically fill in. Select the school from the associated drop-down box (if you have access to more than one). You can see all staff or you can filter by building or district-level staff (0000), depending upon your permissions.

You can also use the filters on the top right to display existing entries by specific positions, or shared status (you must click the **Search** button to activate the staff search).

Normal Mode

The list of staff meeting that filter requirement will appear in the table below the filters. In this example, there are more than 10 pages of alphabetized listings:

Salary Mode

In addition to the "Normal" mode (where you can enter new staff or edit existing staff individually), you can select the Salary Mode for easy data entry of salary information for multiple staff.

Import/Export Tab

The Import/Export tab has a number of options to start out the new collection:

- You will need to decide where the most current data exists, in the local HR system or in FBS application from last year. If your district has an HR system, it will likely be the place for you to start.
- Please see the detailed instructions for Importing Data to help you identify the path that you will want to follow
- The Export functionality is not currently working.

Errors/Omissions Tab

This tab includes a summary list of warning/errors as well as detailed listings that require district-level "Approvals" or state-level "Overrides" ranging from $0 salary to missing a required nurse in the district and missing endorsements. You can "check for Errors/Omissions" anytime.

All errors must be resolved before a district can "Certify" their data.

Certification Tab

When your errors are cleared, you will have a **Certify** button. After clicking the certify button, you will see the **Certified** screen.

Before You Begin – Choose Your Path

To complete Fall BEDs Staff, you will need to:

- **Remove staff** who are no longer in your school/district
- **Add compensation/benefits** information for all current staff (Zeroed out for the new year)
- **Add new staff**, including their demographic data, positions, assignments and compensation
- **Edit existing staff**, including their demographic data, positions, assignments and compensation

The Department has kept the data you submitted last year and has made the following changes:

- **Salary/benefits** have been zeroed out
- **Sharing** information has been cleared out from last year
- **Overrides** have been removed
- **Years of experience** have been incremented by 1

Select an Option

To begin your staff reporting, you need to decide the best method for your situation and identify the path you will follow. The most significant difference between working directly in the FBS application and using an export/import feature is that within the application all of the positions and assignments are selected using text-drop-down boxes. If you use the export/import options, you will need to work with the numeric codes instead.

| Level of Difficulty	Importing	Import/Entry Detail	Go to
Option #1 Simplest	No Importing	Type the data directly into the FBS application	Skip to FBS Reporting
Option #2 Intermediate	Import salaries only	Type compensation data into an Excel spreadsheet (or copy/paste them from other source documents you have), change to a text file and import into FBS	Skip to FBS Reporting
Option #3 Advanced	Import all staff data using vendor-supported HR system.	Export data from a source system that can generate a mixed format extract and import into FBS	Continue to next section: Importing All Data (Vendors)

Importing All Data (Vendors)

Districts with vendor supported HR software will want to use the **Import – Replace Staff Data** to replace all the data in FBS. The other option is to **Import – Update Staff Data**, which will match staff in the file and in last year's FBS based on the local ID (these must match!).

There is a two-step Import process that will prompt you along the way. If you do not advance to Step 2, there are likely errors showing up in red that need correcting before you can complete the import.

Once you have successfully completed importing all of your staff data (demographics, compensation, positions, and assignments) you will need to clear any errors before **Certifying** your data.

Note: Please refer to the Excel files for file specs on the Department website for all of the details you need to align with FBS.

Hint: Importers may report base salary and TSS separately or together. If they are separate, the application will combine them.
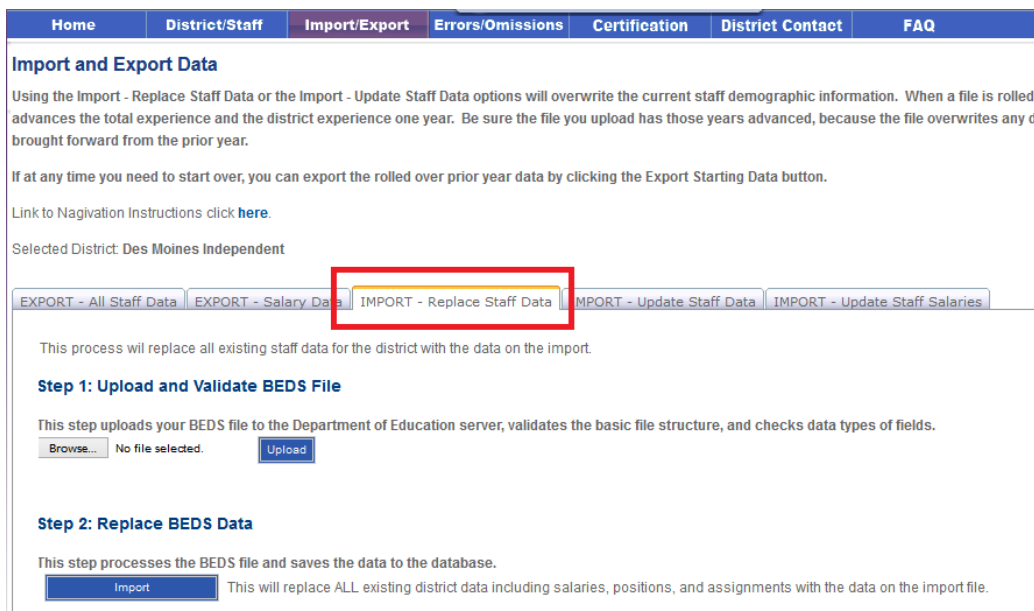
Import - Replace Staff Data

This option will replace all existing staff data. If there are staff that need to be added to FBS that are not in the import file, upload the file first then manually enter the other staff.

This is a 2-step process. The first step allows you to browse your computer, find the file and upload it into our server. The file is then validated for file structure and data types. **This must be a text tab-delimited file.** The second step loads the data into the application and will replace ALL existing staff data, including salaries. **If you are going to import salaries separately, make sure you import this file first.**

Import - Update Staff Data

This option **updates** existing staff demographic and salary data and will **replace** position and assignment data. The existing staff data will be retained if the staff person is not in the imported file. The staff data is only updated when a matching local ID is found.

Delete old staff members from FBS before choosing this import process. If there are new staff that need to be added to FBS, upload the file first then manually enter the other staff.

This is also a 2-step process. The first step allows you to browse your computer, find the file and upload it into our server. The file is then validated for file structure and data types. **This must be a text tab-delimited file.** The second step loads the data into the application. This step will retain existing staff and only update the existing records that match on local ID.

Import - Update Staff Salaries

This tab can be used if the district wishes to update salaries only. **Only records that match on local ID will be updated. This must be a text tab-delimited file.**

This is a 2-step process. The first step allows you to browse your computer, find the file and upload it into our server. The file is then validated for file structure and data types. The second step loads the data into the application. This step will retain existing staff and only update the existing staff that match on local ID.

If you imported a file using either the Import - Replace Staff Data option or the Import - Update Staff Data option and that file contained a local ID, this will become the new local ID. This ID must match the ID of the salary file being imported.

FBS Reporting Steps

This section is designed for users who are reporting manually through the FBS application and for users who will import salaries.

You will need to complete the following steps:

- Remove Existing Staff
- Add/Edit Staff Demographic Details
- Add/Edit Positions & Assignments
- Add/Edit Sharing Information across Districts
- Input Compensation Information or import them

Remove Existing Staff

From the District Page, you can find staff to be removed by listing them alphabetically (default). The drop-down box for School can be used to filter by building or district level or ALL staff. Similarly, you can use the filter options on the far right to find staff who are already in the system.

Depending on how many you need to find, the Search option is typically the fastest. In the Last Name/Folder, enter any portion of the last name you want to find and click on Search (note, the display will not change on the Search until you click **Search**).

Once you have found the record you want to delete, use the [icon] in the View/Edit/Delete tool box to the left of the staff name to delete a record.

Add/Edit Staff Demographics

There are two types of staff that are entered into FBS: certified and non-certified. Certified staff have a Folder Number that can be searched for on the BOEE License Search website. To add a new staff person, therefore, you need to first select Add Certified Staff or Add Non-Certified Staff and the Staff Detail Page will open.

Staff detail page

Do not enter data in the Search by Folder Number field. Enter all data manually.

Hint on Compensation: You can enter compensation information here for new staff, or you can enter it in the Salary Mode along with all other staff OR you can import all staff salaries in Excel. For non-certified staff (no folder number) the Local Staff ID is the key to connect imported salary information. The local ID is generated locally, not by the Department.

Hint on Positions: You can enter positions with the Save and Add Position button or you can Save and Add Another Staff, or Save and Return to the district page. Go to Add/Edit Positions for those instructions.

Edit Existing Staff Demographics

For existing staff, you can edit demographic information by clicking on the Edit icon 📝 for the row/staff person you want.
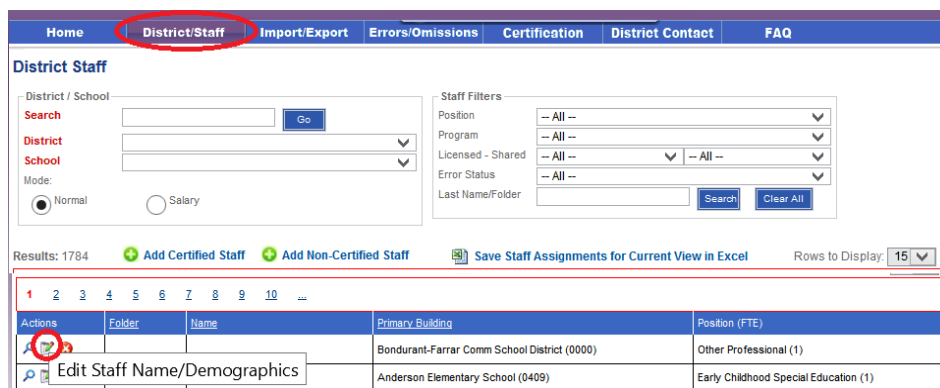
Staff Detail - Data Definitions

Field Name	Required	Definition
Local Staff ID	No	Staff ID assigned by the local district in their HR system.
Folder	Yes	Folder number assigned by BOEE
First Name	Yes	Staff member first name
Last Name	Yes	Staff member last name
Gender	Yes	Staff member gender
Hispanic/Latin Ethnicity	Yes	Yes/No question - ethnicity of the staff member. If staff member refuses to identify, user should attempt to identify.
Race	Yes	Race of the staff member. If staff member refuses to identify, user should attempt to identify.
Birth Month	Yes	Birth month of the staff member
Birth Year	Yes	Birth year, 4-year format
Highest Degree	Yes	Highest earned/completed degree of the staff member
Total Experience	No	Total years of experience, NOT counting the current school year.

Add/Edit Positions and Assignments

Each staff member is required to have at least one position and assignment. To add a position to a staff member from the district page, find the staff person you need and click the magnifying glass to View Detail Assignments.
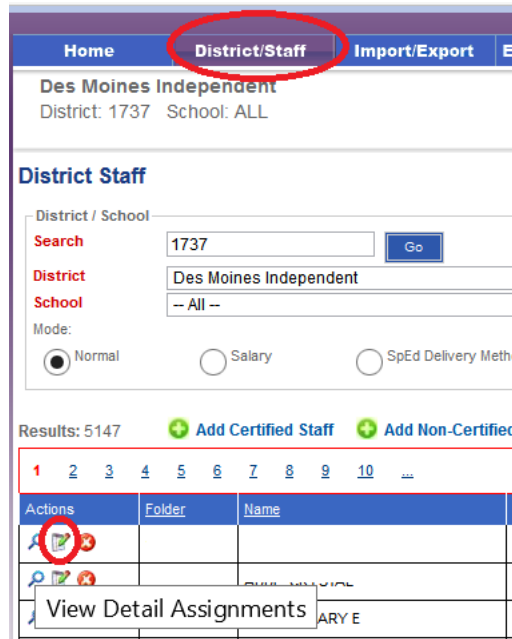
From the Staff Detail page, click on the Add a Position link Located below the endorsements section to open a position dialog box.
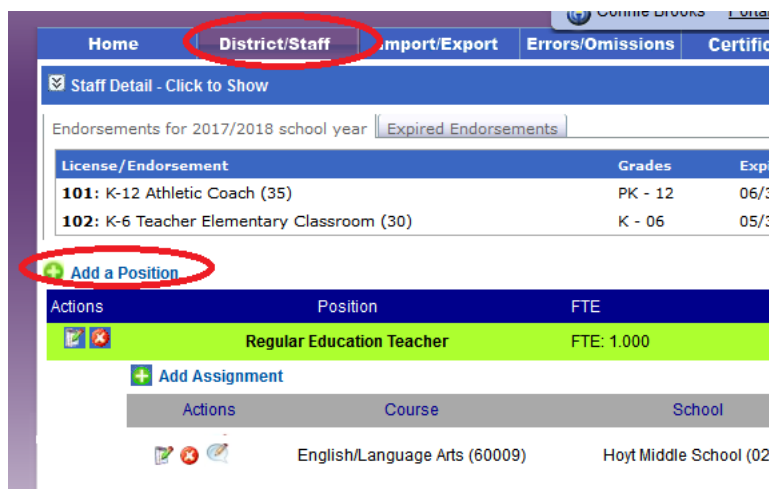
A box will pop-up with position and assignment options. Below is a sample of what you will see.

Hint: Always start with selecting the position first and work your way down, as the other drop-down menus will alter their menu options based on what the user selects. Program options are reflective of special funding streams.

To add additional assignments under one position, click the Add Assignment hyperlink.

Here is a sample entry of a teacher position with three assignments. The FTE and Program (funding) show up at the position level.

Position/Assignment Definitions

| Field Name	Required	Definition
Position	Yes	Position assigned to staff member that matches or nearly matches the position definition outlined in FBS Code Sets.
Program	Yes	The funding source for the position (what funds are you using to pay the staff member for this position). No special program = General Fund
FTE (Full Time Employment)	Yes	Portion of full-time employment for each licensed and non-licensed staff member employed by the district. • Should NOT exceed 1.00 total • Formula to calculate: [(daily hours worked) / (standard work day)] / standard work week • For more details see FBS A-Z Special Topics
Building/School	Yes	Building/school where the assignment takes place
Subject Area	Yes	Academic subject area of the assignment (first 2 digits of the assignment code – in FBS Code Sets)
Course	Yes	Based on Subject Area selection - the list of available courses (last 3 digits of the assignment code – in FBS Code Sets)
Nurse License #	Yes*	Every nurse hired by a school should have a nurse license # from the Department of Public Health (NOT BOEE).

Number of Sections	Yes	Number of sections taught must be entered for each teaching assignment. Assignments may vary according to grade level, curriculum assignment and/or building assignment. Use the following information for general guidance and information:
		● General Elem. Classroom: report # of sections based on the # of different groups of students per assignment
		● MS/HS Classroom: report # of sections based on the # of different groups of students per assignment
		● At-Risk: report as 1 section
		● Pull-out Programs: report as 1 section
		● Overload/Early Bird Schedule: report as 1 section IF student earns credit (example: yearbook)
		● Special Education:
		  ○ Pull-out program: report as 1 section
		  ○ Regular scheduled: report # of sections based on the # of different groups of students per assignment
		  ○ SpEd Teacher in Reg. Ed. Classroom/Teacher: report # of groups the SpEd Teacher is working with.

Grades	Yes	Grade levels that will be taught for this assignment.

Endorsements

When you enter an assignment, the system will generate a list of endorsements that are required for that assignments. By clicking on the **Req'd Endorsement hyperlink** you will activate a pop-up window of possible endorsements. **Warning:** You may need to scroll to the right of your screen to see the endorsement list pop up, depending on the screen resolution you are using!

The FBS application compares both subject and grade level of the endorsements held by the staff against the list of Required Endorsements. Errors are generated if the staff person does not have the proper credentials for an assignment.

Endorsements	Expired Endorsements		
License/Endorsement		**Grades**	**Expiration Date**
101: K-12 Athletic Coach (90)		PK - 12	01/31/2022
1011: Athletic Coach (90)		PK - 12	01/31/2022
102: K-6 Teacher Elementary Classroom (10)		K - 06	01/31/2018
148: K-8 Reading (10)		PK - 08	01/31/2018

If you have an endorsement error that you need assistance with, enter the information into the **comments** option, which is monitored by and responded to by BOEE staff.
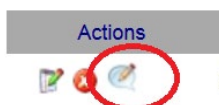
Alternatively, for more information on endorsements and other licensing questions, contact BOEE.

Hint: Endorsements typically apply to either secondary (grades 9-12) or primary (grades PK-8). If a teacher is crossing those grade boundaries, they will need to enter two assignments, one for the primary and one for the secondary. The license/endorsement section on the staff member's page lists all endorsements (active & expired) for the staff member (this is located below the Staff Details section.)

Warning: The Iowa Code requires all staff to be hold proper licenses and endorsements. Staff may need to request a conditional license from the BOEE. Please contact BOEE staff with questions or concerns.

Compensation – Salaries and Benefits

| Compensation Field Name	Definition
Annuities:	The amount to be paid by the AEA for annuities. Only AEA's will be able to see this field in "Salary Mode."
Base Salary/Pay	The amount of gross salary/wages paid for normal work duties, before deductions, including the amount paid from Teacher Salary Supplement (TSS not TLC) funds. Note: If you use the import feature, these values are reported separately but added together in FBS.
Bonus Pay:	The amount of salary or wage to be paid by an AEA as Bonus pay. Only AEA's will be able to see this field in "Salary Mode."
Contract Days	Contract days are the number of days of employment specified in the contract. If not a contract employee, the number of days the employee is expected to work.
Extra Compensation	The amount of salary or wage to be paid for extra duties such as extracurricular activities, extended contract, bonus pay (other than AEA bonuses), incentive pay, performance pay, stipends, mentoring activities and other activities that are outside the regular salary schedule. Also include cash benefits, such as cash paid in lieu of insurance, if paid by the district and paid as salary. Do not include Teacher Leader Supplement here.
Health Benefits	The amount to be paid by the district for health benefits such as health insurance, dental insurance, disability insurance, vision insurance, and long-term care insurance. Include health-related annuities if paid by the district/AEA.
Other Benefits	The amount to be paid by the district for other benefits such as IRS value of housing allowance, IRS value of automobile allowances whether purchased or provided, pay for unused vacation/sick leave, life insurance, other insurance, cell phone contracts paid by the district/AEA and cell phone use reimbursements or cash allowances for non-compensatory business reasons.
Previous Pay	The sum of the base salary, professional development and extra compensation reported from the previous year.
Professional Development	The amount to be paid as salary from professional development supplement.
Retirement Benefits	The employer's amount paid to IPERS and for FICA (Social Security and Medicare); and the employer's share of other retirement benefits if paid by the district.
Teacher Leader Supplement	The amount of salary to be paid for teacher leadership functions (not used for replacement teachers)
Teacher Leader Days	The number of days the teacher will spend in the teacher leadership role. Note: For a .5 teacher and .5 teacher leader over 180 days, both Contract Days and Teacher Leader Days should reflect 180. These are not added together for validation checks.
Total Pay	This is a calculated field that includes base salary/pay, professional development, teacher leader supplement and extra compensation. For AEA's, this will also include bonus pay.

In addition to the "Normal" mode (where you can enter new staff or edit existing staff individually), you can select the Salary Mode for easy data entry of salary information for multiple staff.
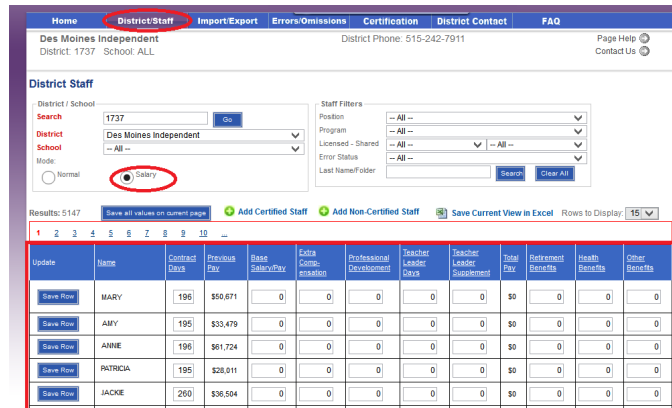
Importing Salaries

Use the **Import – Update Staff Salaries**. **Remember** that you must save the file as a text (tab-delimited) format in order to do the upload into FBS.
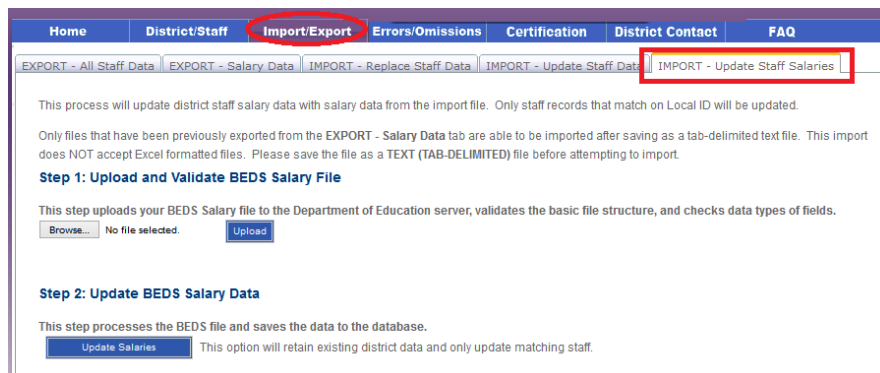

The LocalID is the key variable that will link these salary data to the staff person and the rest of their information (demographics and assignments). Resolving Errors and Warnings

This section of the application is where you can address errors, process approvals and submit override requests. **All errors will need to be resolved before you are allowed to Certify.** Warnings do not need to be resolved, but we strongly recommend reviewing the warning and correct it if necessary.

Error/Warning Summary

This section gives you a quick summary of the error/warning type and the count of those errors. By clicking on the error/warning description you can drill down and filter out the errors/warnings to only those in the selected group.
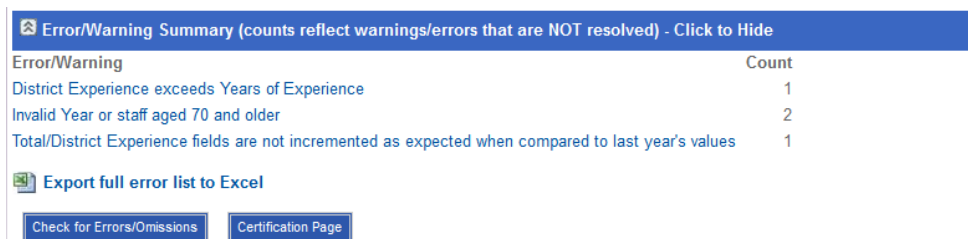
Error checking and validations are run behind the scenes nightly, but are also run when you make a correction on an error or update a staff member's data. You can also force the system to re-run the

validations by clicking on the 'Check for Errors/Omissions' button below this section. This will clear any resolved errors/warnings and get you one step closer to certifying your data.
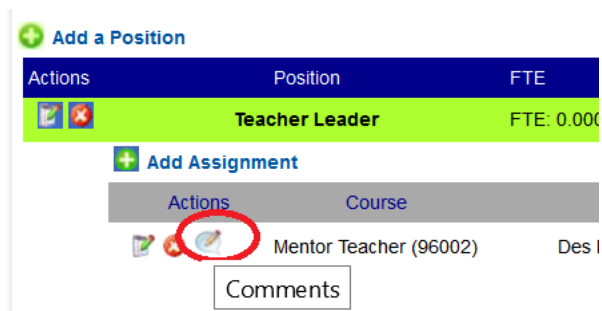
Error/Warning List

Below the Error/Warning summary section is a list of all errors/warnings for your district/school. You have a few filter options where you can hide Approved Warnings and you can also Hide State Overrides.

Some errors are a result of checking imported data that doesn't follow the business rules. Some errors may be typos – for example, typing in the wrong folder number so the license/endorsement data does not match the teaching assignment. Others may be from missing data such as salaries, contract days, positions, and sharing arrangement details.

Error/Warning Resolution Options

- Use the Definitions and Validations spreadsheet to better understand error/warning meanings and how to correct.
- Request a **State level override** by providing a written explanation why license/endorsement errors should be overridden in the Comments section

- Request a **State level override** by sending an email to Shelly with pertinent details. She will confer with School Improvement consultants.
- Approve the **district-level** error/warning by click on the **Approve** checkbox when appropriate (for example, bus drivers that truly are over the age of 70).
- Actually resolve/correct the error or warning that is being displayed.

Review and Certify

Please review your data before certifying!

Data Breakdowns:

- Error Count by School Table: *Lists # of errors per building*
- District Licensed Position Summary: *Count of each Licensed position and total FTE for that position*
- District Non-Licensed Position Summary: *Count of each Non-Licensed position and total FTE for that position*
- District Program/FTE Summary: *Breakdown of total FTE by funding source*
- District Licensed Demographic Summary: *Breakdown of licensed staff demographics*
- District Non-Licensed Demographic Summary: *Breakdown of non-licensed staff demographics*

Please review data for possible inaccuracies or typos:

Staff

- Age – licensed < 20, all staff > 70
- Contract or TL days > 300
- FTE TLC – all salary in Teacher Leader Salary, all contract days in Teacher Leader days
- Total FTE for staff > 1.0

Salaries

- Administrators > $320000
- Teachers > $85000
- Other staff > $150000

Retirement, Annuities, Health benefits

- Administrators > $50000
- Teachers > $30000
- Other staff > $50000

Other benefits

- Administrators > $30000
- Teachers > $10000
- Other Staff > $3000

When your errors are resolved, you will have a **Certify** button.

By clicking the "CERTIFY" button below, I, as Superintendent or Chief Administrator, certify that the data reported on the Fall BEDS Data Survey web forms are to the best of my knowledge and belief true and accurate.

CERTIFY

Complete the Operational Sharing application in the Iowa Education Portal if needed.