

Faculty/Staff Management

Path: Management > Faculty/Staff > Maintain District Staff

Overview

Employee records are maintained in the area termed **Faculty/Staff**. These records, much like the student records, are a collection of required and optional data fields to provide robust and uniform data tracking of employee information.

Access to employee records should be limited. Separate permissions to view and maintain Faculty/Staff data are granted through user permissions. However, personal data, including login names, passwords, PINs and social security numbers are visible. The only employee record tab with additional permissions is the **Site-Year** tab. A separate permission is needed to assign staff to the current site-year. Additionally, a user may manage permissions without attaining access to the employee's other information.

Getting Started

Employees are not able to work in the application until they have a faculty/staff record, user ID, and password. Likewise, teacher assignments in the master schedule cannot be completed until teachers have employee records. In fact, standardization of employee names is forced throughout Tyler SIS. When a data value requires an employee's name, you must select the employee from the Faculty and Staff records. Thus, creating the employee record is crucial as you work toward implementation.

- **User Logins** – Multiple users may use the same login user name and password. However, we highly recommend you create and distribute unique logins as soon as possible.
- **Permissions** – Your production URL includes default user groups with appropriate permissions already assigned.
- Jumpstart your prep work by using these groups, then return later to tweak them to meet your district's unique needs.
- **Search Employees District-wide** – When logged into the Central Office site-year, matching search results that include all faculty/ staff records are displayed. When logged into a building's site-year, matching search results that include only faculty/staff records assigned to the site are displayed.
- Prioritize your data entry.
- If you are entering employee records manually, begin by creating faculty/staff records for key personnel who will assist with the implementation prep work. Next add teachers who must be associated with the class sections they teach. Then add the remaining staff prior to their startup participation.
- If you are importing these records from existing SIS software, SISWIN or SISFIN, use the same criteria as the prior paragraph to check the imported data values, select appropriate roles, create user logins/permissions and assign staff to the appropriate site(s).

Adding a New Employee Record

Considerations

- **Required Fields** – The fields marked with a red asterisk (*) are required. You must type information in the required fields. Other fields are optional and can be completed later if needed.
- **Avoid Duplicate Employee Records** – Tyler SIS allows you to create a new employee record without first searching for an existing record. We highly recommend you first search both active and inactive records to avoid duplication.
- **IDs** – The fields, Employee ID and PIN, are auto-generated if those fields are left blank after clicking **Apply** or **Done**.
- **Add Zip Codes on the Fly** – If the zip code is not listed in the dropdown box on the Address tab, click **Add Zip/City/State** to create a new zip code for the list.

Click **Apply** before moving on to other tabs, if you have been editing as you go.

Add Record

1. On the **Search Existing Employee** screen, check to see if you already have an existing employee record (for complete details about searching see page 11) Enter the employee’s first name, last name, or social security number in the SSN field, check **Include Inactive Staff**, then press the **Enter** key or click **Search**.

If the employee is listed in the search results, select the record and select **Edit** to access the record. If no record exists, click **New Faculty Staff**. The District Faculty/Staff Management screen displays with two tabs, **Faculty/Staff** and **Address**.

Pri Site	Name	Roles	Subject-Sect-Per	UserName	Employee ID	InActive Date
ZZNE-1819	Justice, Sandy N	Special Ed. Service Provider, Other Staff	H9036-03-8	SanJus	24771	
ZZAS-1819	Krause, Sarah R	Teacher	SP001-02-3, SP1010-02-3, SP1010-04-3,	SarKra	10389	

Complete the required field information. On the **Faculty/Staff** tab, enter **First Name**, **Last Name** and **FTE** (full-time equivalency). FTE defaults to 1.00 and is the employee's total FTE at all assigned sites. The **Hire Date** field is also a required field.

NOTE: In another document, you can learn more about the state reporting fields and how to break down the employee's total FTE by individual sites.

2. Click the Address tab and enter **Street Name**, and **Zip Code**. Click **Apply**. The screen refreshes with additional tabs.



3. Click any of the data tabs and continue adding data. Click **Done** to save your work and leave the record.

Faculty/Staff Tab

1. Keep in mind that other than the required fields previously mentioned, the remaining fields on this tab are optional. Track data which is important to your district and/or site. Below is additional insight into some of these optional fields.
2. If you left **Employee ID** or **Pin** fields blank, the refreshed screen displays auto-populated values in these fields.
3. Fill in the Email Address field with the employee's school email address. In the Parent Portal, this email address displays as a link, allowing parents to email teachers who instruct classes their students attend. It also allows the employee to retrieve their password if they have forgotten it by clicking **Forgot your password?** on the User Login screen.

- The photo fields displayed on this tab are reference-only fields, pulled from the Photo Module. These fields will display the most recent date the photo was taken, the most recent date a Photo ID was printed and the number of times a photo was taken.

- If you enter information in the spouse area and click **Apply**, Clear Spouse Info displays. Use this later to remove all spouse fields simultaneously.
- Click **Apply** to save and continue.

Address Tab

This tab maintains both physical and mailing address information.

Mailing Addresses – You may enter multiple mailing addresses. For example, during the summer, an employee relocates to a summer home and wishes school mail to be sent to that address.

Mailing Override – Determines which mailing address is current. If the mailing address area is blank or none of the entries are marked as **Mailing Override**, Tyler SIS assumes the physical address is the current mailing address.

- Enter the physical address in the field, **Primary 911 Address** area.

- If the mailing address is different than the physical address, in the Mailing Override area select **Add**. The **Address Information Maintenance** screen displays.

ADDRESS INFORMATION MAINTENANCE
 Name: Donna Brewster ID: 10140
 FTE: 1.000 Hire Date: 08/02/96 Termination Date:

Done Apply Cancel

Mailing Override:

Location:

Line1: Line2: Line3:

Phone1: (555) - Ext1:

Phone2: (555) - Ext2:

City: State:

Zip: Country:

3. Enter the required information. Check the **Mailing Override** box if this is the current mailing address and phone contact.
4. The dropdown list for **Address Type** identifies the address as **Home**, **Vacation**, or **Work**.
5. Click **Done** to save and return to the **Address** tab.
6. Click **Add** again if you wish to enter another mailing address.
7. Click **Apply** to save and continue.

Emergency Contact Tab

Important emergency contact information displays all summary information in a single grid row.

MAINTAIN DISTRICT STAFF
 Name: Donna Brewster ID: 10140
 FTE: 1.000 Hire Date: 08/02/96 Termination Date:

Done Apply Cancel Actions

Faculty/Staff Address **Emergency Contact** User Properties and Roles Site-Year Assignment

Add

Name	Relationship	Cell Phone	Home Phone	Work Phone	Comment
DONNA N Brewster	Self		5554970244		

There is both a short **Comment** in the grid, along with a longer **Note** area within the contact's detail screen. The comment displays in the grid; the note displays only when the item is opened by clicking the Select icon

EMERGENCY CONTACTS MAINTENANCE
 Name: Donna Brewster ID: 10140
 FTE: 1.000 Hire Date: 08/02/96 Termination Date:

Done Apply Cancel

Comment:



First Name: DONNA Middle: N Last: Brewster Relationship: Self

Cell Phone: (555) -

Home:
 Phone: (555) 497-0244
 Address: City: State: Zip:

Work:
 Phone: (555) - Ext:
 Address: City: State: Zip:

Note:

1. Click **Add** to create an entry, and then click **Done** to save the entry and see it displayed on the tab.
2. Click **Add** to add another entry.
3. Use the up/down arrows   if you wish to prioritize contact preference.
4. Click **Apply** to save and continue.

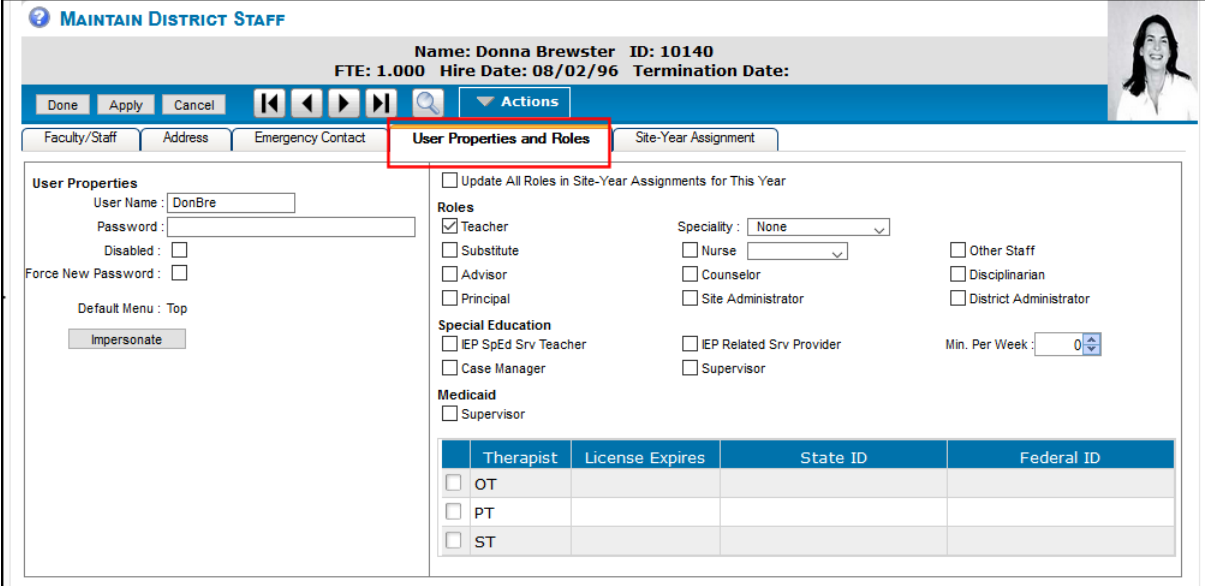
User Properties and Roles Tab

This tab defines the employee’s login properties and role(s) within the district.

- **User Name** – The field is limited to no more than 60 alpha/numeric characters.
- **Password** – The field is limited to no more than 12 alpha/numeric characters. If you plan to allow users to create their own permanent passwords checking **Force New Password**, then leave the password blank for ease of data entry.

Roles

In general, roles create categories which you may use for internal report purposes, such as a list of all Teachers, thus consistency is important. If a specific role is not available, use Other Staff. If you select the roles **Teacher** or **IEP SpEd Srv Teacher**, the user is logged into the teacher menu by default. All roles listed under **Special Education** drive specific functions within the Special Services Module. For details see *User Permission List* on the Tyler SIS support site.



MAINTAIN DISTRICT STAFF

Name: Donna Brewster ID: 10140
 FTE: 1.000 Hire Date: 08/02/96 Termination Date:

Done Apply Cancel [Navigation icons] Actions

Faculty/Staff Address Emergency Contact **User Properties and Roles** Site-Year Assignment

User Properties

User Name: DonBre
 Password:
 Disabled:
 Force New Password:
 Default Menu: Top
 Impersonate

Update All Roles in Site-Year Assignments for This Year

Roles

Teacher
 Substitute
 Advisor
 Principal

Specialty: None
 Nurse
 Counselor
 Site Administrator

Other Staff
 Disciplinarian
 District Administrator

Special Education

IEP SpEd Srv Teacher
 Case Manager
 IEP Related Srv Provider
 Supervisor

Min. Per Week: 0

Medicaid

Supervisor

	Therapist	License Expires	State ID	Federal ID
<input type="checkbox"/>	OT			
<input type="checkbox"/>	PT			
<input type="checkbox"/>	ST			

1. Type the **User Login Name** (required) and **Password** (optional).

User Properties

User Name :

Password :

Disabled :

Force New Password :

Default Menu : Top

Check **Disabled** if you wish to deactivate the user; they remain disabled until the checkmark is removed. If the user attempts to login, an error message is displayed.

User account is currently locked.

2. Check **Force New Password** if you wish to prompt the user for a new password when they log in for the first time.
3. You can impersonate other staff users without logging out or knowing their password. Click **Impersonate**; you become the selected user and see their normal screen (Classic or 360). Data changes are recorded as the impersonated user. To stop impersonating and return to the original logged in user:
 - In 360 a special orange **User** icon displays when impersonation is active; click the icon and select **Stop Impersonating**.



- In Classic, click the red **Stop Impersonating...** at the top of the screen.

Stop Impersonating Donna Brewster (DonBre)

NOTE: The **Impersonate** button is only displayed for logged in users with permission. **SIS Utilities/Management>Impersonate Staff User**. You cannot impersonate the sdmadmin user.

4. In the **Roles** section, identify the user's role(s) by checking the appropriate boxes.

Update All Roles in Site-Year Assignments for This Year

Roles

Teacher Speciality :

Substitute Nurse

Advisor Counselor Other Staff

Principal Site Administrator Disciplinarian

District Administrator

Special Education

IEP SpEd Srv Teacher IEP Related Srv Provider Min. Per Week :

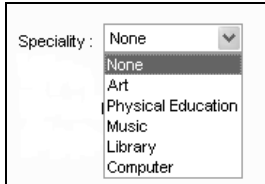
Case Manager Supervisor

Medicaid

Supervisor

	Therapist	License Expires	State ID	Federal ID
<input type="checkbox"/>	OT			
<input type="checkbox"/>	PT			
<input type="checkbox"/>	ST			

- You may further define a teacher's role by selecting a **Specialty** from the dropdown list. **None** would identify a regular classroom teacher.



NOTE: The roles of Teacher, Substitute, IEP SpEd Srv Teacher, Case Manager, and IEP Related Srv Provider have a teacher menu. All other roles have a full menu.

- Skip **Update All Roles in Site-Year Assignments for This Year**. If you later edit roles and wish the change to affect all assigned sites, check this box.

Caution! If the roles are not the same at all sites, do not use this feature. Instead, adjust the roles by site on the **Site-Year Assignment** tab. Example: counselor at one site and teacher at another.

- Click **Apply** before moving to the next tab.

Site-Year Assignment Tab

The Site-Year Assignment tab is used to assign employees to one or more sites and define their roles at each site. When opened, the screen displays all active sites for the current site-year.

Assigned	Site Type	Year	Site Code	Site Name
Primary	AS	1920	ZZAS	Edwards Education Center
	CE	1920	ZZTS	Midwest Regional Career Center
	CO	1920	ZZCO	Edwards Central Office
	EC	1920	ZZEC	Edwards Early Childhood
	EL	1920	ZZEE	East Elementary School
	EL	1920	ZZNE	North Elementary School
	EL	1920	ZZWE	West Elementary School
Additional	HS	1920	ZZHS	Edwards High School
	MS	1920	ZZMS	Edwards Middle School

You may select specific sites and site-years from this tab. When assigning employees to sites, Tyler SIS creates, by default, a primary assignment at the site you are logged into. We suggest logging in to each site to manually create site assignments. You may work from the central office site to create assignments. However, you must change the Primary assignment on each employee whose Primary assignment is another site. If you are importing data, Primary site assignment may be pre-determined as part of your data prep prior to import. However, you must add Additional assignments manually. If you are rolling over data from one year to the next, an existing employee is assigned to the same sites as the previous year.

- Type** – Use the dropdown list to narrow the grid's focus to a particular site type. The grid defaults to **All**.

Type: ALL Year: 1920

Update Display
Assign User to All Sites
User Permissions

2. **Year** – Use the dropdown list to change the grid’s focus to another school term. You may create a separate assignment for any year selected. The grid defaults to the current year.
3. Click **Update Display** to refresh the screen with the new **Type** and/or **Year** criteria.
4. **Assign User to All Sites** – Use to simultaneously activate the user’s access to all sites listed in the grid. Otherwise, use the grid below to grant access to the appropriate individual site(s). This assignment is for the site-year displayed in the **Year** field.
5. **Assigned** – The default grid view displays all active sites for the school year displayed. Under this column, double-click the cell for each site you wish to assign the user to and select **Primary** or **Additional** from the dropdown list. Each employee must have a primary site. To remove a site-year assignment, select the blank at the top of the list.
6. Click the expand icon to display the detail of the assignment.

	Additional	HS	1920	ZZHS	Edwards High School
<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		MS	1920	ZZMS	Edwards Middle School

7. Check appropriate role(s) for each assigned site.
8. Click **Apply** to save and continue.
9. **User Permissions** – If you have created a **User Login Name** for the employee, you are ready to assign the employee’s permission rights.
 - a. Click **User Permissions** on the Site-Year Assignment tab.
 - b. Select the **Permission Group** from the dropdown list if applicable.

NOTE: Permission groups help you manage user permissions. Your URL displays a default list of user groups to assist you with user rights. These default groups are pre-designed with permissions that suit the traditional groups listed. We suggest you begin with these groups and their permissions. Later, you may change the permissions of the group at any time, tweaking them to meet the specific needs of your district.


USER PERMISSIONS

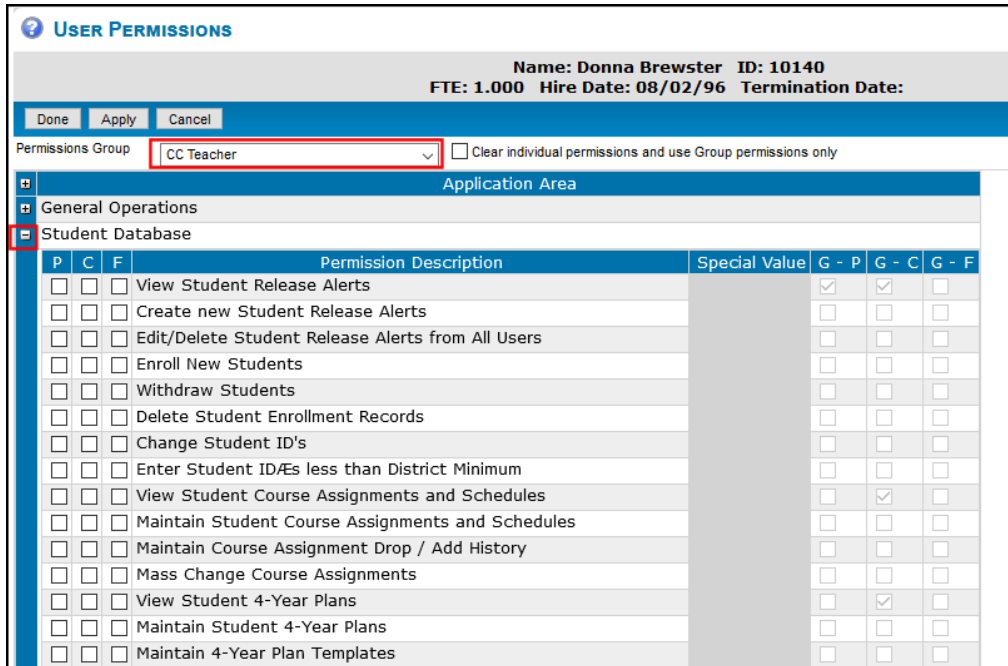
Name: Donna Brewster ID: 10140
FTE: 1.000 Hire Date: 08/02/96 Termination Date:

Done Apply Cancel

Permissions Group: CC Teacher Clear individual permissions and use Group permissions only

	P	C	F	V	S	G	P	G	C	G	F
Application Area											
Description											
Special Value											
Application Area											
Description											
Special Value											

- c. The screen refreshes to display the user group assignment. Click **Apply** to save and continue.
- 10. Next, click the expand icon  for any or all section(s) in which the user should have additional individual permissions. Group permissions for the selected group are checked on the right-hand side of the screen, designated: G-P (past site-year), G-C (current site-year) or G-F (future site-year).

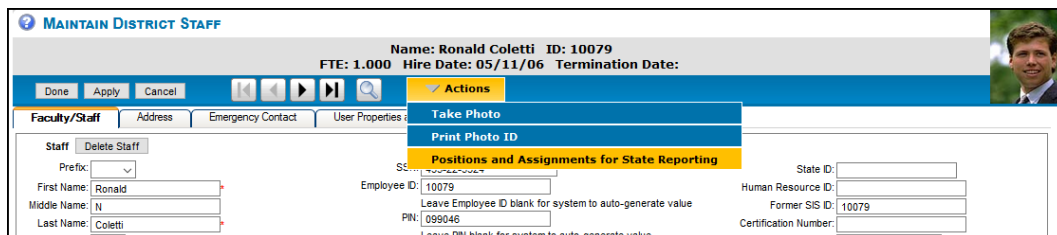


P	C	F	Permission Description	Special Value	G - P	G - C	G - F
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View Student Release Alerts		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Create new Student Release Alerts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit/Delete Student Release Alerts from All Users		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enroll New Students		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Withdraw Students		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete Student Enrollment Records		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Change Student ID's		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enter Student ID's less than District Minimum		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View Student Course Assignments and Schedules		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintain Student Course Assignments and Schedules		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintain Course Assignment Drop / Add History		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mass Change Course Assignments		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View Student 4-Year Plans		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintain Student 4-Year Plans		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Maintain 4-Year Plan Templates		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 11. Check the boxes on the left-hand side of the screen for individual permissions, designated: P (past site-year), C (current site-year) or F (future site-year).
- 12. Click **Apply** to save and continue or **Done** to save and exit.

Positions and Assignments for State Reporting

Some states are required to report staff data not included in previous screens. Such data may be stored on the Positions and Assignments for State Reporting screens. Access the screens from Staff Management by clicking **Actions > Positions and Assignments for State Reporting**.



Or from the menu by clicking **Management > Faculty/Staff > Positions and Assignments for State Reporting**.

The data options on this screen differ from state to state. See your states documentation on the Tyler Support site.


Searching for Employee Records

Use the search criteria, **Roles**, to produce a list of users with the same roles. For example, Role = Teachers would give you a list of all site teachers. Once you enter the first teacher's record in the results grid, use the navigation arrows to move from one teacher's record to another.

1. By default, the search Site/Year is the one you are currently logged into. To change, click to change either and click **Go**.
2. Type search criteria in one or more of the fields. You can type all or part of the search criteria (e.g., in the Last Name field, type Co or Corbin).
3. The search is limited to Active employees unless you check **Include Inactive Staff**.
4. Click **Search**. The **Results** tab displays a list of employees meeting the search criteria. The grid displays the employee's name, Site-Year assignments, roles, employee ID, and User ID (User Login Name).

Name	Roles	Subject-Sect-Per	UserName	Employee ID	InActive Date
Coletti, Ronald N	Teacher		RonCol	10079	
Collier, Jacklyn C	Teacher		JacCol	10228	
Conkling, Russell S	Teacher		RusCon	10354	
Corbin, Robert B	Teacher	H3000-07-3, H5200-01-1, H5210-01-1, H5296-01-4, H5296-02-7, H5297-01-5, H5400-01-3, H5999-02-6, H9040-07-8, H9999-03-2	RobCor1	10609	


5. Click the **Select** icon  in the appropriate row to access the employee's record.

6. Once in an employee record, use the **Navigation** toolbar  to move through the employees. Each time you search, Tyler SIS remembers the tab you were on when you requested to search another employee's record. This is a convenient feature when you are viewing or editing the same information on different records.

Editing Employee Records

Within the permissions area, **SIS Utilities/ Management**, there are two permissions which allow you to edit employee records:

- Modify Properties of Staff Assigned to the Current Site
- Modify Properties of Staff District-wide

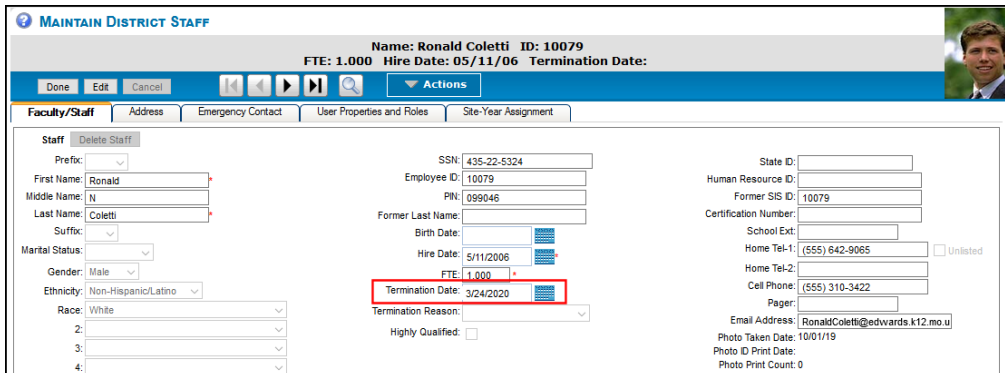
If you choose the **Select** icon  when you enter the employee record, **Edit** is active if you have permissions to edit Faculty/Staff data.

1. Locate the employee record.
2. Click **Edit** to enter the employee's record in edit mode, and then follow the steps listed in this document to add or change information about an employee.
3. Click **Apply** to save your work before you move to another tab within the employee's record or click **Done** to save and exit.

Making an Employee Record Inactive

If an existing employee leaves your employment, enter the termination date. This allows you to retain the record, rather than delete it. Inactive records are not accessed when you search employee records unless you check on the option to include inactive staff on the **Search Existing Employees** screen. Protect your data by disabling the employee's password. Remember this is a web-based program. If a user has login access, they can login from any location with internet capability.

1. From the Faculty/Staff tab, enter a date in **Termination Date** field.



The screenshot shows the 'MAINTAIN DISTRICT STAFF' interface for employee Ronald Coletti (ID: 10079). The 'Staff' tab is active, and the 'Termination Date' field is highlighted with a red box, containing the date 3/24/2020. Other fields include Prefix, First Name (Ronald), Middle Name (N), Last Name (Coletti), Suffix, Marital Status, Gender (Male), Ethnicity (Non-Hispanic/Latino), Race (White), SSN (435-22-5324), Employee ID (10079), PIN (099046), Former Last Name, Birth Date (5/11/2006), Hire Date (5/11/2006), FTE (1.000), Termination Reason, and Highly Qualified checkbox. Contact information includes Home Tel-1 ((555) 642-9065), Home Tel-2, Cell Phone ((555) 310-3422), and Email Address (RonaldColetti@edwards.k12.mo.us).

2. Click **Apply**.
3. From the User Properties and Roles tab, check the Disabled box if you wish to deactivate the user. It will remain disabled until the checkmark is removed.

MAINTAIN DISTRICT STAFF

Name: Ronald Coletti ID: 10079
FTE: 1.000 Hire Date: 05/11/06 Termination Date: 03/24/20

Done Apply Cancel [Navigation Icons] Actions

Faculty/Staff Address Emergency Contact **User Properties and Roles** Site-Year Assignment

User Properties

User Name: RonCol
Password: [Text Field]
Disabled:
Force New Password:
Default Menu: Top
Impersonate

Update All Roles in Site-Year Assignments for This Year

Roles

Teacher
 Substitute
 Advisor
 Principal

Specialty: [None]
 Nurse
 Counselor
 Site Administrator

Special Education

IEP SpEd Srv Teacher
 IEP Related Srv Provider

Other Staff
 Disciplinarian
 District Administrator

Min. Per Week: 0

If the user attempts to login, an error message displays **User account is currently locked.**

4. Click **Done** to save and exit.

Printing an Employee Record

1. Use the printer icon in your browser window to print from each tab.
2. Look for an improvement to this process as an upcoming feature.

Deleting an Employee Record

There is no undo button. You may wish to print the employee record before you delete the information and file the printed copy in the employee's permanent record.

1. From the **Faculty/Staff** tab, click **Delete Employee**.

MAINTAIN DISTRICT STAFF

Done Edit Cancel [Navigation Icons]

Faculty/Staff Address Emergency Contact

Staff Delete Staff

Prefix: [Dropdown]
First Name: Ronald

2. If the employee is assigned to multiple sites and you are not logged into the central office site, you receive an error message, blocking the deletion. Click **Cancel** to exit the record.

Fac/Staff assigned to more than one site. Must be logged into CO to delete!

3. Click **Apply** to save and continue or **Done** to save and exit.

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