INFORM Reporting—The Importance of TCS and Staff Data

Data about the people within your classes, schools, district, and/or state is vital to the setup of your INFORM instance. It is the foundation upon which all INFORM reports and modules are built. Ensuring your internal system of record is accurate and complete, and that you can import this data into INFORM, will enable you to reap the many benefits of INFORM.

Getting TCS data from your Student Information System (SIS) is a very simple process. The amount of information required to start your imports is very minimal—in general, if you are able to print class rosters containing the class, teacher name, and a list of students, you have all the information available that you will need.

Your steps to success include:

- Making sure your system of record is accurate, complete, and has a unique identification number (Person Code) for every person
- Preparing data extracts for import
- Inspecting these extracts for accuracy, completeness, and conformance to specifications
- Importing the data on your user acceptance (UA) site, determining and correcting errors, and re-importing until "no data is left behind"
- Importing data on your production site
- Enabling users by creating their user names and passwords
- Establishing a regular import schedule to refresh data

Once you complete these steps, you will be ready to load assessment data, start writing IEPs, load professional development data, and generate reports.

General Preparation Instructions for TCS Data

Teacher, Class, Student, and Staff data loads are performed through tab-delimited or fixed-width text files (.txt) created from extracts from your "system of record" for people and classes, generally your Student Information System (SIS) and possibly your Human Resources database. EDmin's Data Consulting Services has experience with over 30 different database applications and can provide advice and assistance with extracting data from those systems into files meeting our import specifications. *Based on our experience, EDmin strongly recommends selecting a tab-delimited format rather than fixed-width.*

Two tabs in succession must represent any fields that are skipped within tab-delimited files. The null value will act as a placeholder for optional fields. All fields, both required and optional, must be included; required fields may not contain null values. File headers should never be included.

In many instances, you will see the requirement for a unique identifier. A unique identified is an alphanumeric code with the following properties:

No other person or entity of the same type can have the same identifier. All people, school buildings, and classes represented in INFORM must have unique identifiers. A person and a building may have the same identifier, but two people may not have the same identifier.

Even if that person or entity ceases to exist or be inactive, the identifier must remain with the person or entity. If that person or entity becomes active again, the same identifier must be used. Hence, a student, teacher, staff member, or administrator leaving the district and returning must keep the same identifier. If a school is closed and re-opened, it must maintain its same identifier.

One of the key unique identifiers for people in the INFORM system is referred to as the Person Code.

In general, client system administrators conduct School, TCS, and Staff Imports. Files may be prepared as one file for each "type" (school, teacher, class, student, staff) or multiple files with each containing the teachers, classes, students, or staff for the individual schools (and a single file for school imports). **Very large districts (15,000 ADA and above) may wish to consider working on a school-by-school basis to ease problem analysis, debugging, and data cleanup.**

File names should clearly identify the content and timeframe in which they were prepared. A suggested naming convention for these imports is:

DistrictName_<SchoolName>_Type_Date

For example, a teacher import might be named SDCS_Madison_Tchr_022806.txt.

User Acceptance (UA) Sites

EDmin strongly recommends that both self-hosted and EDmin hosted clients have a User Acceptance site for testing data loads. Our best practice recommendations include using this site to:

- Test TCS and Staff data imports until the process is well understood and the system(s) of record, usually the Student Information System (SIS) and/or HR system, contain accurate information to transfer to INFORM.
- Test complex new assessment loads. The database from the production system will be copied to the UA site. After testing the load on the UA site, the client will validate the data and the data will be copied or reloaded to the production site.

If you have any questions concerning these recommendations, please contact your EDmin Client Relationship Manager or Client Engagement Manager.

Codes and Information: District and Schools

Codes and Information for Districts and Schools are used to prepare your INFORM site to receive enrollment and assessment data. District information must be entered manually. School information may be entered manually or by a one-time import. The school table in this section can be reproduced in MS Excel or MS Word and then populated with the requested information as you would like it to appear in your INFORM site.

Assigning the District Code and School Codes is very important, as these will be used to identify teachers, students, and classes in subsequent data imports. Note that if your INFORM site is used to support multiple districts that these codes must be unique – each district must be assigned its own code. In the event that you do not wish to assign and maintain your own unique codes, you may want to use your assigned National Center for Education Statistics (NCES) or state identifier.

INFORM District Codes & Information			
Field Name	**Maximum Number of Characters**	**Required**	**Note**
District Name	70	Yes	Alphanumeric
District Code	15	Yes	Alphanumeric
NCES District ID	20	Optional	Alphanumeric
State District ID	20	Optional	Alphanumeric
Region	70	Optional	Alphanumeric information for locality

In a similar manner, each school must have its own unique School Code. Again, if you do not wish to assign and maintain your own unique identifier or school code, you may wish to use the NCES (http://nces.ed.gov/)assigned school numbers.

Schools within a district may also be grouped into clusters for reporting purposes. These may reflect any sub-districting or other geopolitical grouping schemes within your district. These must be set up in the INFORM user interface before completing school data entry or import.

When setting up schools you should give consideration to all buildings in your district that house students, teachers, and staff. An administration building or facility dedicated to housing exceptional student education staff may be set up as well. Care must be taken to avoid a double definition of classes however, since these may affect roll ups of student performance when student assessment data is loaded. Your EDmin Client Engagement Manager (CEM) or Data Analyst is available to assist you in reviewing your set-up and proposed imports.

School imports are one-time only. There is no re-import feature for either a full or incremental import. School names may be freely corrected in the user interface if they are incorrect.

INFORM School Codes & Information				
Column	**Field Name**	**Maximum Number of Characters**	**Required**	**Note**
1	District Code	15	Yes	Unique, alphanumeric
2	School Code	15	Yes	Unique, alphanumeric
3	NCES School ID	20	Optional	Alphanumeric
4	State School ID	20	Optional	Alphanumeric
5	School Type	1	Optional	Selection one character from: Preschool (P), Elementary (E), Middle School (M), High School (H), Adult School (A), Student Self-Study (D), Other (O)
6	School Name	70	Yes	Alphanumeric
7	Address	100	Optional	Alphanumeric
8	City	50	Optional	Alphanumeric
9	State	2	Optional	Alphanumeric
10	Zip/Postal Code	20	Optional	Alphanumeric
Not in upload file	Administrator Name			Selection from user interface; will present list of those defined as school administrators (after import); field used for online contact information display purposes only and must be set after upload

Changing Import Settings
Before actually doing an import, you will need to check the import settings on your INFORM site. These are located at Setup > User Manager > Import > Edit Import Settings. The settings and their recommended values are:
- **Acceptable Percentage of Personal Information Duplication**
  - o This should be set to 10-30% for most usual teacher and student imports – the highest value possible. There will always be people sharing the same names and same birthdays, especially in larger districts with large student populations.
- **Acceptable Percentage of Teacher/Student ID Duplication**
  - o This should be set to 0% for most usual imports. All people imported or entered into INFORM must have unique person codes. These unique codes must be present in your SIS or HR system prior to extraction. If you generate duplicate IDs for students in the system, you need to be aware that assessment records may be assigned to the wrong student after you resolve the duplicate issue.
- **Acceptable Percentage of National ID Duplication**
  - o This should be set to 0% for most usual imports. While providing a Social Security Number or National ID is optional in INFORM, if supplied, they must be unique for all people.