

## APPENDIX S

### Staff Survey Checklists

**Purpose and Use:** The checklists in this appendix are for each of the staff surveys, and are intended for school district use in the preparation, processing, verification and update of each DOE Information Database staff survey. They have been designed to assist the district MIS and data processing staff in determining that all important steps have been included in the process, all data have been submitted, errors have been corrected and the expected results for the survey have been achieved. Some districts may have created their own checklists. If this is the case, additional items may be found in this appendix that can be used to update existing checklists. Other districts are urged to use these checklists or to customize them to suit the needs of the district.

The following is an explanation of each of the major headings on the checklists:

**Timeline:** Appendix B of this manual lists the timelines for each staff survey. These timelines include the survey dates, due date, state processing window, and last day of the update window.

**Record Formats:** The record formats listed are the ones to be reported for the survey. It is essential that the district staff determine that the latest version of the format for the reporting year is being used. It is also essential that district staff study the record formats to determine which staff members and which data elements are to be reported for the survey. Useful information can be found on the cover pages of each record format.

**Selected Data Elements by Record Format:** The district needs to pay close attention to the data elements listed in this section. They are not listed because they are the most important for the survey. They are listed because they have been problematic in the past as far as quality and accuracy of reporting are concerned. The district needs to be certain that these elements are accurate for each staff member reported in the survey. Remember, after the close of the state processing window for each survey, reports and files are generated to fill requests and to create publications. Consequently, it is essential that reported data are accurate.

**Datasets Loaded to the DQ2 System:** District MIS and data processing staff must check files submitted for processing in DQ2 Production in Survey Submission under File Processing to be certain that all datasets submitted by the district have loaded. Making this determination can save valuable time in the long run.

**Validation/Exception Reports:** These reports must be requested by the district after appropriate datasets have successfully processed, they are not automatically produced in the DQ2 System. The requests should be made as early in the survey period as possible to allow ample time for corrections to be made.

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**Reports Helpful for Reviewing Data Submitted:** Once datasets have been submitted, these reports will give the district a view of certain kinds of information. They can be used to determine whether the data submitted have produced the expected results. In some instances, these reports will point out data problems which can be investigated and corrected prior to the close of the processing window. Reports that are produced by school can be shared with school level staff for data verification.

Reports requested are available upon request within minutes in the DQ2 System.

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### Staff Survey Checklists Survey 2

**Timeline:** See Appendix B.

#### **Record Formats:**

- Staff Demographic Information
- Staff Experience
- Staff Multidistrict Employee
- Staff Payroll Information
- Staff Additional Job Assignments
- Staff Additional Compensation
- Staff Benefits

**Note:** Please review record format cover pages to determine the data to be reported for this survey.

#### **Selected Data Elements by Record Format:**

##### Staff Demographic Information

- Job Code, Primary – Assign this code based on the job duties performed the majority of time by the employee. This code is used to categorize employees for aggregate reporting.

##### Staff Experience

- Experience Type – Report for all instructional personnel including, instructional administrators.
- Experience Length – Report a length of “00” for an employee in the first year of the experience type.

##### Staff Payroll Information

- Job Code, Primary – Assign this code based on the job duties performed the majority of time by the employee. This code is used to categorize employees for aggregate reporting.
- Salary Schedule Pay Type – The employee’s salary pay schedule determines this code.

##### Staff Additional Compensation

- Additional Compensation Type – Include all additional compensation types an employee is scheduled to receive for the school year.
- Additional Compensation Value - Include actual total dollar values of the compensations an employee is scheduled to be paid for the school year.

##### Staff Benefits

- Selected Benefits, Type – Include all types that apply to the employee.
- Selected Benefits, Value – For benefits disbursed in aggregate amounts, prorate the amount across all employees to whom the benefit applies.

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### Staff Survey Checklists Survey 2 (Continued)

#### Datasets Loaded to DQ2:

- F61025 – Staff Demographic Information
- F61026 – Staff Experience
- F61027 – Staff Multidistrict Employee
- F61028 – Staff Payroll Information
- F61029 – Staff Additional Job Assignments
- F61030 – Staff Additional Compensation
- F61031 – Staff Benefits

#### Validation Reports (These reports must be requested by the district because they are not automatically produced in DQ2.):

- F61399 – Staff Demographic Information Validation
- F61400 – Staff Additional Compensation Validation
- F61401 – Staff Payroll Information Validation
- F61402 – Staff Additional Job Assignments Validation
- F61403 – Staff Benefits Validation
- F61404 – Staff Experience Validation
- F61406 – Staff Multidistrict Employee Validation
- F70658 – Staff Demographic Aggregate Validation

**NOTE:** Particular attention should be given to F61399 validation edit #30 and F61401 edit #50. Staff Demographic records without matching Staff Payroll records (and vice-versa) will be deleted from the Staff Database after the close of the survey.

#### Reports Helpful for Reviewing Data Submitted:

- F07269 – Staff Survey
- F60683 – District Media Services
- F61205 – Primary Teachers/Paraprofessional FTE
- F61555 – District Salary Survey (Part I)
- F61556 – District Salary Survey - Payroll
- F61559 – District Salary Survey – Additional Compensation
  
- F70069 – Educational Funding Accountability Report
- F70533 – Qualified Paraprofessionals by School
- F70534 – List of Qualified Paraprofessionals
- F71291 – Reading Endorsement Competencies- Teachers
- F71292 – Reading Endorsement Competencies - Reading Coaches

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### Staff Survey Checklists Survey 3

**Timeline:** See Appendix B.

#### **Record Formats:**

- Staff Demographic Information
- Staff Experience
- Staff Payroll Information
- Staff Additional Job Assignments
- Staff Additional Compensation
- Staff Benefits

**Note:** Please review record format cover pages to determine the data to be reported for this survey.

#### **Select Data Elements by Record Format:**

##### Staff Demographic Information

- Job Code, Primary – Assign this code based on the job duties performed the majority of time by the employee. This code is used to categorize employees for aggregate reporting.

##### Staff Experience

- Experience Type – Report for all instructional personnel including, instructional administrators.
- Experience Length – Report a length of “00” for an employee in the first year of the experience type.

##### Staff Payroll Information

- Job Code, Primary – Assign this code based on the job duties performed the majority of time by the employee. This code is used to categorize employees for aggregate reporting.
- Salary Schedule Pay Type – The employee’s salary pay schedule determines this code.

##### Staff Additional Compensation

- Additional Compensation Type – Include all additional compensation types an employee is scheduled to receive for the school year.
- Additional Compensation Value - Include actual total dollar values of the compensations an employee is scheduled to be paid for the school year.

##### Staff Benefits

- Selected Benefits, Type – Include all types that apply to the employee.
- Selected Benefits, Value – For benefits disbursed in aggregate amounts, prorate the amount across all employees to whom the benefit applies.

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### Staff Survey Checklists Survey 3 (Continued)

#### Datasets Loaded to DQ2:

- F61025 – Staff Demographic Information
- F61026 – Staff Experience
- F61028 – Staff Payroll Information
- F61029 – Staff Additional Job Assignments
- F61030 – Staff Additional Compensation
- F61031 – Staff Benefits

#### Validation Reports (These reports must be requested by the district because they are not automatically produced in DQ2.):

- F61399 – Staff Demographic Information Validation
- F61400 – Staff Additional Compensation Validation
- F61401 – Staff Payroll Information Validation
- F61402 – Staff Additional Job Assignments Validation
- F61403 – Staff Benefits Validation
- F61404 – Staff Experience Validation
- F70658 – Staff Demographic Aggregate Validation

**NOTE:** Particular attention should be given to F61399 validation edit #30 and F61401 edit #50. Staff Demographic records without matching Staff Payroll records (and vice-versa) will be deleted from the Staff Database after the close of the survey.

#### Reports Helpful for Reviewing Data Submitted:

- F07269 – Staff Survey
- F60683 – District Media Services
- F61205 – Primary Teachers/Paraprofessional FTE
- F61555 – District Salary Survey (Part I)
- F61556 – District Salary Survey - Payroll
- F61559 – District Salary Survey – Additional Compensations
- F70069 – Educational Funding Acct. Report Require
- F70533 – Qualified Paraprofessionals by School
- F70534 – List of Qualified Paraprofessionals
- F71291 – Reading Endorsement Competencies - Teachers
- F71292 – Reading Endorsement Competencies - Reading Coaches

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### Staff Survey Checklists Survey 5

**Timeline:** See Appendix B.

**Record Formats:**

- Staff Demographic Information
- Staff Professional Development
- Staff Fiscal Year Salaries
- Staff Fiscal Year Benefits

**Note:** Please review record format cover pages to determine the data to be reported for this survey.

**Select Data Elements by Record Format:**

Staff Demographic Information

- Job Code, Primary – Assign this code based on the job duties performed the majority of time by the employee. This code is used to categorize employees for aggregate reporting.

Staff Fiscal Year Salaries

- Job Code – Assign this code based on the job duties performed by the employee. This code is used to categorize employees for aggregate reporting.
- Fiscal Year Salary – Report all salary earned by the employee during the fiscal year.
- Additional Compensation Type/Value – Include all additional compensations paid to the employee for the fiscal year.

Staff Fiscal Year Benefits

- Selected Benefits, Type/Value – Include all benefits to which the school district contributed for the employee for the fiscal year. For benefits disbursed in aggregate amounts, prorate the amount across all employees to whom it applies.

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### Staff Survey Checklists Survey 5 (Continued)

#### Datasets Loaded to DQ2:

- F61025 – Staff Demographic Information
- F61869 – Staff Professional Development
- F63313 – Staff Fiscal Year Salaries
- F63318 – Staff Fiscal Year Benefits

#### Validation Reports (These reports must be requested by the district because they are not automatically produced in DQ2.):

- F61399 – Staff Demographic Information Validation
- F61874 – Staff Professional Development Validation
- F63317 – Staff Fiscal Year Salaries Validation
- F63322 – Staff Fiscal Year Benefits Validation
- F70658 – Staff Demographic Aggregate Validation

#### Reports Helpful for Reviewing Data Submitted:

- F60682 – Staff Terminations (Aggregate)
- F70093 – Fiscal Year Additional Compensation Report
- F70094 – Fiscal Year Benefits Report
- F70095 – Fiscal Year Salary Totals Report
- F70533 – Qualified Paraprofessionals by School
- F70534 – List of Qualified Paraprofessionals
- F71291 – Reading Endorsement Competencies Adopted 2011 - Teachers
- F71292 – Reading Endorsement Comp. Adopted 2011 - Reading Coaches
- F21000 – Classroom Teacher Attendance Report



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### Staff Survey Checklists Survey 8

**Timeline:** See Appendix B.

**Record Formats:**

\_\_\_ Staff Demographic Information

**Note:** Please review record format cover page to determine the data to be reported for this survey.

**Select Data Elements by Record Format:**

Staff Demographic Information

\_\_\_ Social Security Number – For loading to the PMRN system, this must match to the Primary Instructor Responsible, Reading reported on the Student Demographic format.

**Datasets Loaded to DQ2:**

\_\_\_ F61025 – Staff Demographic Information

**There are no Staff Validation Reports for survey 8.**