BASIC EDUCATIONAL DATA SYSTEM (BEDS)

ADMINISTRATION MANUAL
EDUCATIONAL PERSONNEL DATA FORM

&
Electronic Personnel Master File (ePMF) USER GUIDE

2016-17

Updated Fall 2016

TEACHERS

In School Districts, Charter Schools and BOCES

Office of Information and Reporting Services

The University of the State of New York
THE STATE EDUCATION DEPARTMENT
Information and Reporting Services
Albany, NY 12234
**TABLE OF CONTENTS**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INTRODUCTION</strong></td>
<td>4</td>
</tr>
<tr>
<td><strong>GENERAL INSTRUCTIONS</strong></td>
<td>5</td>
</tr>
<tr>
<td>What You Should Know in Advance of Logging into ePMF</td>
<td></td>
</tr>
<tr>
<td><strong>THE EPMF APPLICATION</strong></td>
<td>6</td>
</tr>
<tr>
<td>Accessing Your ePMF Form</td>
<td></td>
</tr>
<tr>
<td><strong>COMPLETING THE EPMF FORM</strong></td>
<td>9</td>
</tr>
<tr>
<td>A. Verifying Personal Information</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>TEACH ID</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Identifying Your Location (BEDSCODE)</td>
<td></td>
</tr>
<tr>
<td>B. Educational Experience</td>
<td>9</td>
</tr>
<tr>
<td>Degree Status</td>
<td></td>
</tr>
<tr>
<td>Professional Development</td>
<td></td>
</tr>
<tr>
<td>Educational Experience</td>
<td></td>
</tr>
<tr>
<td>Number of Months/Percent of Time Employed by District</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Current Annual Salary</td>
<td></td>
</tr>
<tr>
<td>C. Employment Information</td>
<td>9-11</td>
</tr>
<tr>
<td>Number of Years Employed in This District</td>
<td></td>
</tr>
<tr>
<td>Total Years Employed - (Including Nonpublic)</td>
<td></td>
</tr>
<tr>
<td>Percent of Time Employed in this School District</td>
<td></td>
</tr>
<tr>
<td>Number Months Employed by this District</td>
<td></td>
</tr>
<tr>
<td>Current Annual Salary</td>
<td></td>
</tr>
<tr>
<td>D. Teaching Assignment Information</td>
<td>11-14</td>
</tr>
<tr>
<td>Selecting Assignment Codes</td>
<td></td>
</tr>
<tr>
<td>Grade Level</td>
<td></td>
</tr>
<tr>
<td>Registration (Number of Students)</td>
<td></td>
</tr>
<tr>
<td>Subject Matter Knowledge</td>
<td></td>
</tr>
<tr>
<td>TABLE OF CONTENTS Continued</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td>----</td>
</tr>
<tr>
<td>SAVING AND SUBMITTING YOUR EPMF FORM</td>
<td>15</td>
</tr>
<tr>
<td>ADDITIONAL TEACHING ASSIGNMENT GUIDANCE</td>
<td>15-16</td>
</tr>
<tr>
<td>ADMINISTRATOR REVIEW AND CERTIFICATION OF PMF DATA</td>
<td>17</td>
</tr>
</tbody>
</table>
INTRODUCTION

Please read through this manual in advance of completing your ePMF form.

The data collected in the ePMF system is legally required to be provided to the New York State Education Department (NYSED) and used for state and federal reporting purposes. Therefore, reporting complete and accurate information is the best way to ensure that your district’s data is accurately represented.

This manual is designed to provide assistance with completing the Basic Educational Data System (BEDS) personnel forms (ePMF forms) by all teachers employed in school districts, BOCES and charter schools.

While many of the reported data elements within the form reference “BEDS Day” (October 5, 2016), the form does not need to be completed and submitted on BEDS Day. It is likely there will be considerable traffic on the Teacher Access and Authorization (TAA) system https://eservices.nysed.gov/taa/ around BEDS Day.

In February 2017, ePMF forms will be locked and teachers will not be able to make changes. Administrators with entitlements to TAA/TSRV/ePMF will review the forms and make corrections as needed.

Your administrator may require an earlier deadline and should provide you with a timeline for completing your ePMF form.

After your district has reviewed the data it will be submitted to NYSED. Your Superintendent, Data Coordinator, or BEDS Coordinator should be able to inform teachers when the district has loaded their Staff Snapshot data and that teachers should begin entering their ePMF data via TAA. If your district, charter school or BOCES did not load your TEACH ID into Staff Snapshot in the Student Information Repository System (SIRS), you will not see an ePMF form. If you see a form from your prior school district, they may have inadvertently loaded a record for you.

As in the past, the data submitted to the Department will be used to generate Out of Certification reports. The Department will not be accepting assignment code changes after the data are certified, submitted, and after the Final Out of Certification reports are generated. Therefore, we suggest you review teacher assignments carefully and if you have questions about certification, contact the Office of Teaching Initiatives within the Department http://www.highered.nysed.gov/tcert/.

If you have questions concerning these instructions contact your data coordinator or e-mail us at https://datasupport.nysed.gov.

(4)
GENERAL INSTRUCTIONS

Persons having both teaching and non-teaching duties should complete an ePMF (BEDS) form for their teaching assignments, and non-teaching assignments will be reported through the Student Information Repository System (SIRS) via eScholar Staff Assignment and Staff Snapshot Template. Non-teaching professionals do not need to fill out an ePMF (BEDS) form.

The following individuals should not complete an ePMF form:

- Individuals not employed on a regular basis;
- Teachers working exclusively with non-public school students;
- Teacher aides;
- Non-Teachers;
- ROTC teachers;
- Certified and non-certified teaching assistants;
- Athletic Directors; and
- Teachers on a leave of absence during the ePMF collection period.

Personnel working in a district, but employed by a BOCES (Board of Cooperative Educational Services) should have a form under the BOCES code.

Substitute or interim staff, long-term or otherwise, are not covered by §3012-c, d unless they are also a teacher in the classroom teaching service and are serving as the teacher of record. Districts/BOCES will need to collect data elements to support teacher of record determinations (Please see Sections B2, B3, D1, and M2 of the APPR Guidance document posted on EngageNY at https://www.engageny.org/resource/guidance-on-new-york-s-annual-professional-performance-review-law-and-regulations.).

Teachers of half- and quarter-year courses should only report the number of students they are currently teaching on BEDS Day and before the ePMF closes in February and should not report second semester or second/third/fourth quarter classes.

What you should know in advance of logging into ePMF:

- Your login information (username and password) for the TAA system (Teacher Access and Authorization) is where teachers providing instruction in grades 4-8 ELA and Math and Regents Math can check their Teacher Student Roster data;
- The registration (count of students) in each of your assignments; and
- The predominant grade level of the students in each class.
THE ePMF APPLICATION IN TAA

The electronic Personnel Master File (ePMF) system collects data submitted by teachers concerning the assignments they teach, grade level, years of experience, and more. Each teacher completes an ePMF form per district. If you work in multiple districts and each district loaded your TEACH ID in Staff Snapshot you will see a button on the form to access a different ePMF form for each district identifying you as a teacher.

If you need more information or help filling out your ePMF form, you can visit the NYSED Information and Reporting Services PMF page: [http://www.p12.nysed.gov/irs/beds/PMF/home.html](http://www.p12.nysed.gov/irs/beds/PMF/home.html).

Accessing Your ePMF Form

Accessing the ePMF (electronic Personnel Master File) form is done through the TAA (Teacher Authorization and Authentication) system.

For assistance with username and password information related to TAA, visit the following page: [http://eservices.nysed.gov/taa/](http://eservices.nysed.gov/taa/).

**NOTE:** A new secure email (Token) process will be instituted in 2016-17, replacing the Personal Identification Number (PIN) process for TAA teacher authentication. Starting in mid-September, PINs will no longer be generated and posted to the NYSED Business Portal. This process had required data coordinators or administrators to retrieve the PINs and distribute them to teachers. There was also a delay in PIN distribution following an account deactivation.

For teachers with current active accounts, no action will be required unless you cannot recall your password and security questions and need to reset your account. After requesting an account reset, you would then need to utilize the new Token process.

Tokens are generated for teachers who do not have active TAA accounts or require an account reset. Following a valid record in Staff Snapshot, and a teacher completing Step 1 in the account creation process, a token will be generated and sent to the teacher’s Staff Snapshot email address. The teacher clicks on the link with the token and is directed to the TAA system and begins the account creation process.

For teachers that require an account reset, they will have to provide the last 4 digits of their social security number, date of birth, and 7-digit TEACH ID. Your district may store your TEACH ID with two leading zeros. A single use token will then be emailed to the teacher’s Staff Snapshot email address. The teacher clicks on the link with the token and is directed to the TAA system and completes the account creation process.

The new process is summarized in the chart below.
TAA Account Creation Process for a Teacher without an Existing Account

**Step 1 - Account Setup**
Teacher clicks on the create account button in TAA at [https://eservices.nysed.gov/taa/](https://eservices.nysed.gov/taa/) and enters last 4 of their SSN, DOB, TEACH ID.

**Step 2 - Token Distribution**
A single use token is created and emailed to the teacher's Staff Snapshot email address.

**Step 3 - Account Activation**
Teacher clicks on the link with the token and is directed to the TAA system at [https://eservices.nysed.gov/taa/](https://eservices.nysed.gov/taa/)
Provides necessary account information (username, password, security questions)

---

TAA Account Reset Process for a Teacher that Cannot Log-in

**Teacher is unable to log into TAA at [https://eservices.nysed.gov/taa/](https://eservices.nysed.gov/taa/)**

- Cannot recall the password or security questions

**Step 1 - Account Reset**
Teacher clicks on the "Reset Account" link if unable to answer security questions; enters last 4 of their SSN, DOB, and TEACH ID.

**Step 2 - Token Distribution**
A single use token is created and emailed to the teacher's Staff Snapshot email address to reset the account.

**Step 3 - Account Activation**
Teacher clicks on the link with the token and is directed to the TAA system at [https://eservices.nysed.gov/taa/](https://eservices.nysed.gov/taa/)
Provides necessary account information (username, password, security questions)
Once logged into TAA, the landing page is viewable; teachers can view their Teacher Student Roster Verification Reports (TSVR), and complete and submit their ePMF data.
NOTE: The ePMF form is generated only after a valid staff snapshot record for a teacher is loaded to Level 2, populating Field 8, with “TEACHER.” This is followed by a successful login for existing accounts or creation of a new TAA account. After these steps are taken, administrators with entitlements through SEDDAS to TAA/TSRV/ePMF will be able to view and edit ePMF forms as needed.

COMPLETING THE ePMF FORM

**These data are reported from your district’s Staff Snapshot and is the official source for ePMF. Please contact your administrator if there is an error in what is reported, they will make the appropriate corrections.

Verifying Personal Information

TEACH Data
Those of you who are returning teachers in this district should have a form with personal information that is pre-populated. The following items: last name, first name, TEACH ID, and date of birth are derived from the TEACH system. If some of this information is incorrect, you should contact the Office of Teaching Initiatives in the Department.
Phone number – (518) 474-3901

BEDS Code (Building Location)
Those of you who are new to a district may see the district code in your ePMF account as your location. This would also be the case if your district did not provide your building location prior to loading Staff Snapshot data. You may choose your school building location from the drop-down menu on the ePMF form. If you work in more than one school building or in the district’s central office, the district code will be your location code.

Educational Experience

Degree Status**
The highest degree you currently hold will be reported by your district.

Professional Development**
Completed if you received professional development during the current school year. “NA” pertains to first-year teachers, teachers on leave, and teachers who had only non-teaching assignments. Use the definition of “professional development” found in ESSA at: http://www.p12.nysed.gov/irs/beds/PMF/documents/CertificationandProfessionalDevelopment.pdf .

Employment Information

Number of Years Employed in this District in a Professional Position**
The number of years employed in this district will be reported by your district. This year counts as one full year of experience in this district.
Total Years Employed in a Professional Position (Including Nonpublic) **
This number will consist of all years of professional educational experience, including other public school districts, nonpublic schools, BOCES, and college or university experience within NYS. Your district will report this on your behalf.

Percent of Time Employed in this School District**
For most of you, the entry will be reported as 100 percent. However, there may be some teachers whose services are shared by more than one district or BOCES who have been teaching only part-time, such as a teacher who teaches mornings only. Districts cannot report more than 100 percent.

Number Months Employed by this District**
This refers to the number of months you are employed in the district. The period reported should range from 1 to 12 months. Even if you receive your salary over a 12-month period, the entry reported should be the number of months you are expected to be on the job for 2016-2017.

Current Annual Salary**
Your current salary reported by the district should include the following (if applicable):

- Primary instructional assignments;
- More than one primary assignment (e.g. teacher and Director of Curriculum);
- Instructional and professional stipends related to your primary assignments (e.g. chairing a department or serving as both a teacher and administrator); and
- Stipends for college credits, in-services, mentoring, longevity/steps, and compensation activities that pertain to your pedagogical duties as long as it is part of the contracted annual salary.

The following should not be included:

- Additional pay received for supervising extracurricular activities beyond the normal assignments, such as for coaching or for supervising clubs; and
- Summer school pay or overtime pay.

The diagram below illustrates what portions of the ePMF form are completed by the district and the teacher. If there is an error in reporting, please contact your administrator.
TEACHING ASSIGNMENT INFORMATION

Selecting Teaching Assignment Codes

Assignments are added by clicking on the “Add Assignment” link at the bottom of the page. A box will open (see below) displaying the first page of assignment codes (See the screenshot below).

Teacher provides assignment data as was done in prior years.
A user can use the search box to enter the assignment code or assignment description. The search box will autofill once you start typing.

Grade level and core class designations are made at this point. Guidance about these data elements can be found later in this document.

<table>
<thead>
<tr>
<th>Assignment Code</th>
<th>Assignment Name</th>
<th>Grade Level</th>
<th>Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>3112</td>
<td>FOURTH GRADE ENGLISH</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td>3114</td>
<td>FIFTH GRADE ENGLISH</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td>3116</td>
<td>SIXTH GRADE ENGLISH</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td>3118</td>
<td>ENGLISH 7</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td>3120</td>
<td>ENGLISH 8</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td>3122</td>
<td>ENGLISH 9</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td><strong>3124</strong></td>
<td><strong>ENGLISH 10</strong></td>
<td><strong>10</strong></td>
<td><strong>22</strong></td>
</tr>
<tr>
<td>3126</td>
<td>ENGLISH 11</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td>3128</td>
<td>ENGLISH 12</td>
<td>Select Grade...</td>
<td></td>
</tr>
<tr>
<td>3170</td>
<td>ENGLISH HUMANITIES</td>
<td>10</td>
<td>16</td>
</tr>
</tbody>
</table>

Showing 1 to 10 of 25 entries (filtered from 789 total entries)
After you have selected your assignments, you can click outside the assignment box to the main ePMF form. Your assignments should now be in view at the bottom of the form.

Clicking in the Add Assignment box will open the assignment window (see next slide) where you can search for assignments or open a PDF of the assignment codes.
Grade Level

For the assignment you are recording, enter the predominant grade level of the students.

The following are general rules for determining grade level:

- If 75% or more of the students in your class are in any one grade, please enter that grade.
- If less than 75% of the students are from any one grade, enter an "E" for "Mixed Elementary," an “M” for "Mixed Middle," or an "S" for "Mixed Secondary" grades.
- “PK” stands for pre-kindergarten, while “K” stands for kindergarten. Do not combine half-day classes. Use two assignment blocks.
- "E," "M" and "S" represent "Mixed" elementary, middle, and secondary grades, respectively.

Registration (Number of Students)

Under “Registration,” record the number of students in the particular class or assignment reported.

Teachers of half- and quarter-year courses should only report the number of students they are currently teaching (on BEDS Day) and should not report second semester or second/third/fourth quarter classes.

Teachers should not combine classes and student registration numbers. Report each class separately showing the appropriate number of students for each class.

NOTE: This item asks for registration data (student counts) in the traditional sense of one teacher per group of students.

For team-teaching situations, report only the number of students to whom you would be teaching your subject matter under ordinary circumstances. For instance, if a team of 3 teachers is working with 90 students, each teacher should report the number of students he/she would ordinarily be meeting outside of a team-teaching situation (for example, 3 classes or 30).
SAVING AND SUBMITTING YOUR EPMF FORM

All ePMF forms can be saved when clicking the "Save" button at the bottom of the form. If you are uncertain about some of the information you have entered and need to return to the form, click “Save.” You will have to return to it later and "Submit" to finalize your selections.

If the information is complete and accurate you should click, and “Submit.” You will **not** be able to edit the ePMF form after submission. Your Superintendent will then be able to review and correct the data before submitting it to the New York State Education Department.

ADDITIONAL TEACHING ASSIGNMENT GUIDANCE

If none of the listed assignment titles correspond precisely with the title(s) of your assignment(s), please select the assignment code(s) that most accurately describes your assignment(s).

**NOTE:** Use caution in reporting assignments in the areas of Health Education (4512-4516); Health Occupations Education (5912-5998); and Health Services, which are non-teaching assignment codes under School Health Services (2208-2298). These are three distinct assignment areas and are **not** interchangeable.

Notice that each major subject area has a category “Other.” Select the assignment code for “Other” only if you cannot find another title that describes your course assignment. Use “Other” sparingly. For example, if an English teacher finds that none of the listed course titles in any way describes a literature course he/she teaches, that teacher should select the assignment code for “Other English.”

Note that there are blocks for sixteen assignments.

Be sure to report each unique assignment code.

**Elementary Team Teachers** should report only one Common Branch assignment (ACODE = 2612) which represents their primary homeroom assignment, and as many sections of their elementary subject specialty as warranted (e.g., 4112 for Elementary Mathematics or 4315 for Social Studies, Grade 4).

Teachers who meet with classes including students with disabilities for the purpose of teaching specific subjects such as physical education, art, music, reading or math, should report the class under an assignment code in their specific certified subject area. **Inclusion teachers should use the Consultant Teacher assignment codes.**
Except for the variations just noted, teachers should complete one assignment block for each class taught. Reporting should be based on the following guidelines:

- Pre-K and Kindergarten, Common Branch, and other teachers who spend the entire day with the same class will complete only the first assignment block;

- Pre-K and Kindergarten teachers who teach two half-day sessions should complete a second assignment block;

- Elementary and Secondary school teachers who have different groups throughout the day should complete one assignment block for each class they teach to a different group of students, and for each different course they teach to the same group.

The following are examples using these guidelines:

- An English teacher who teaches the same literature course to five different groups must complete five assignment blocks.

- An English teacher who teaches five different courses must complete five assignment blocks even if he/she teaches two or more of those courses to the same group of students.

Laboratory classes offered in conjunction with science courses should not be reported if the lecture and lab are taught to the same group of students by the same teacher. In the event that labs and lectures are taught by different teachers, each teacher should report the class separately using the same assignment code, with one teacher reflecting the lectures and one teacher reflecting the labs.

Remember that the general rule is to complete one assignment block for each class taught.

Teachers serving students with disabilities are to report an assignment using a special education program code.
ADMINISTRATOR REVIEW AND CERTIFICATION OF PMF DATA

In February 2017, the ePMF access for teachers will be locked down, preventing additional data entries. During the ePMF collection period (beginning on BEDS Day and ending in January 2017), Superintendents (CEOs) and those individuals entitled by the CEOs to have access to the “Personnel Master File” through SEDDAS (SED Delegated Account System), will be able to review and correct PMF data. However, the CEO may impose a shorter timeline, requiring teachers to enter all their data sooner. For additional information concerning TAA entitlements, visit: http://www.p12.nysed.gov/irs/TSDL/.

IMPORTANT NOTE: As in the past, the data submitted to the Department will be used to generate Out of Certification reports. The Department will not be accepting assignment code changes after the data are certified, submitted, and after the Final Out of Certification reports are generated. Therefore, we suggest you review teacher assignments carefully and if you have questions about their certification, contact the Office of Teaching Initiatives within the Department: http://www.highered.nysed.gov/tcert/.