Security Access: Setting Staff Types (Roles)

This document outlines how a Security Coordinator at an Education Organization sets and manages local staff types (roles). I also recommend watching this online training video.

Prerequisites:
- The Education Organization has completed the Education Organization Registration Process.
- The Organization Leader has accepted the organization assurances and designated up to two Data Security Coordinator(s). Only the Organization Leader can do this.

Information on how to complete these steps is online at https://www.in.gov/doe/it/link-initiative/

Security Coordinators
Each organization has up to two Data Security Coordinators, who oversee the setup of the LINK staff types (roles) for the persons within their corporation. These are persons who are usually within the technology department and are designated by the Superintendent/Organization Leader. To locate your Security Coordinator, please consult with your local administrator. If you require further assistance, please contact link@doe.in.gov.

Staff Types and the Ed-Fi Data Exchange System
The staff types (roles) are designed so that they can be sent directly from the school's Indiana Ed-Fi certified student information system (SIS). Setting staff types directly in the Security Access portal is meant as a way to get started with the LINK Portal or for designations that cannot occur in your local SIS. Before adding too many of these manually, you may wish to have a conversation with your SIS vendor on where to enter the data/information in the local SIS software.

If your SIS can send these data to Data Exchange/LINK, then this is where the roles should be set. Those with an SIS that can send these data may over-ride any data in the LINK Security Portal to match what is found in the local SIS, even if no roles are set in the SIS.

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Instructions for Security Coordinators

Login

Security Access can be accessed via the LINK Portal (https://link.doe.in.gov) You will utilize either the "Login with Google" or "Login with Microsoft" button, dependent on your organizations' choice of either Google's G Suite for Education or Microsoft 365, when registering the domain.

Upon login, users will see displayed the IDOE systems (or tiles) to which they have access.

Those persons designated by the leader of their organization as a Security Coordinator will have the "Security Access" tile.
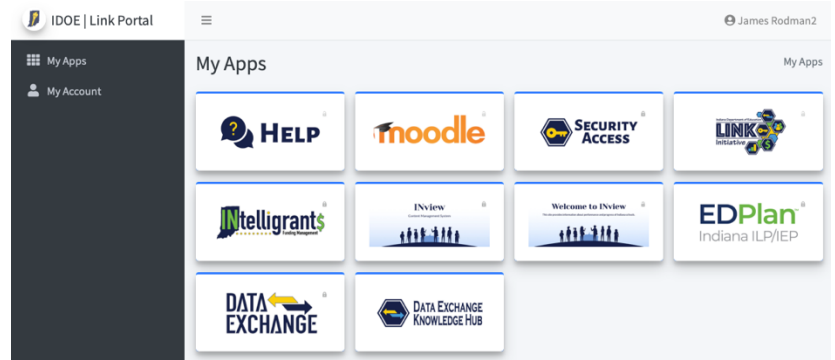
Security Coordinators may also login directly at https://security.doe.in.gov. This site is only available to Security Coordinators.
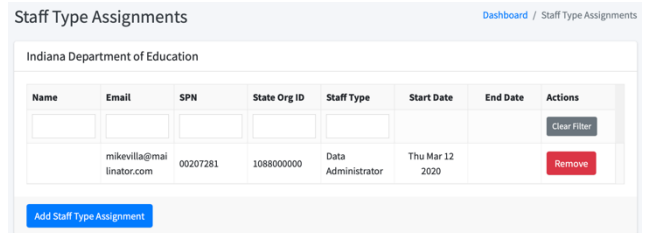

How to set Staff Types (roles) manually- NOTE: check with your SIS vendor for instructions if your vendor can send these data

1. Click on the Security Access Tile
   This will take you to the Security Portal, where you will see the organization(s) you have access to manage.
2. Click, "Manage Staff Types"
   - Note: "Manage Security Coordinators" is only available to the leader of your organization.
   - "View Ed-Fi ODS Keys" is how IDOE will securely provide Ed-fi keys to corporations/schools
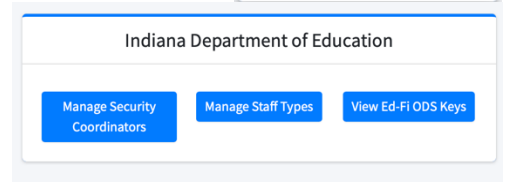
A list of staff and previous staff type assignments will appear.

3. Click the button, "Add Staff Type Assignment"

4. Complete the required information and then click "Save":

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Add Staff Type Assignment

Email

SPN

State Organization ID

1088000000

Staff Type

Superintendent

Begin Date

3/23/2020 3:38:18 PM

End Date

Save   Cancel

Email: This needs to correspond to the staff members' Google G-Suite or Microsoft 365 domain of your organization.

SPN: School Personnel Number. Required. This can be looked up/requested via the STN Application Center.

Staff Type: This is the staff type you wish to provide the staff member.

Begin Date: Date the access for this staff type should begin.

End Date: Date the access for this staff type should no longer function. If you know up-front when that date is, please enter the end date within LINK. Otherwise, leave blank.

LINK tile assignment requires the user to have logged into LINK at least once. First-time users may need to logout and then log back into the system 15 minutes later to see the assigned tiles.

Key Contacts

Key Contacts are a subset of Staff Types, which are intended to be utilized only for communication by the IDOE and unlike other staff types, do not provide access or functionality within other systems. Collecting, obtaining and maintaining these critical business contacts, now known as "Key Contacts" is important in IDOE's effort to streamline communication processes.

Some things to know about key contacts:
- IDOE has NOT officially transferred to using the LINK "Corporation Test Coordinator". Please continue to designate this official contact with the office of student assessment via the DOEOnline system. IDOE will officially communicate when this transition happens and what the new procedures are. While we would like these Key Contacts entered to begin collecting the data, please make sure to

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also continue to follow the official, existing procedures, so the Office of Student Assessment has this important contact information.
- Key contacts will NOT provide access to IDOE systems. The information will be utilized to indicate the primary contact(s) for communication from IDOE.
- Key contacts are primarily for corporations and schools. Add only those that apply to your organization. (e.g. a special education cooperative doesn't necessarily have a Principal, yet does have a Special Education Director)

Key Contacts
- **Superintendent** – all corporations/charters
- **Assistant Superintendent -** all corporations/charters

- **Financial Contact -** all organizations
- **Chief Technology Officer -** all corporations/charters, accredited non-publics
- **Special Education Director -** all corporations/charters, special education cooperatives, charter authorizers.
- **Corporation Test Coordinator -** all corporations/charters, accredited non-publics
- **Data Exchange Contact-** all public/charter and accredited non-public schools
- **Title IX Coordinator**
- **504 Coordinator**
- **School Safety Specialist**

- **Principal -** all public/charter and non-public schools
- **Assistant Principal -** all public/charter and non-public schools

(Principal and Assistant Principal should utilize the StateOrganizationId (10CORPSCHL) of the school)
- **Special Education Director**:
  - Special Education Cooperatives will add their Special Education Directors
  - A corporation may or may not also have a local Special Education Director contact.
  - Each charter authorizer should designate a person to receive special education communication

Some contacts that LEAs are required to report to IDOE, yet are not key contacts are:
- **Board President**
- **Board Vice-President**
- **Board Secretary**
- **Board Member**

LINK STAFF TYPES

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The below descriptions for each staff type are guidelines. Local decision should be made regarding which staff types best "fit" each staff's local responsibilities. Superintendents, School Administrators of Non-publics, and Finance Officers are expected to certify (sign-off) on data so appropriate staff types (roles) must be assigned to those staff.

LEA Administrator
This staff type is for those staff who are, or will be, responsible for overseeing the data for their corporation. It is recommended the LEA Administrator role is assigned to superintendents or director-level persons within a public corporation. Assign using the StateOrganizationId of the corporation.
- INview: supplement accountability data with pictures, text, and highlights for the corporation and schools within.
- Data Exchange: This staff type is for the person(s) who are responsible for the review and certification (sign-off) of corporation or school data. Typically, this will be the superintendent.

w/Data Certification
The decorator role of "Data Certification" with LEA Administrator is a powerful combination; This provides signoff power throughout IDOE systems.
For example:
- Data Exchange: a person with these roles is able to complete the certification (sign-off) process that the student-level counts submitted to the state are accurate and without error. They are responsible for the final review and certification (sign-off) of the six data certification submission cycles.

Financial Administrator
It is recommended this role is assigned to the financial officer, CFO, etc. of a corporation or non-public school. If you are a corporation/charter, assign using the StateOrganizationId of the corporation.
- **Data Exchange:** This staff type is for the person(s) who are responsible for the review of financial data.

w/Data Certification
The decorator role of "Data Certification" with Financial Administrator is a powerful combination; This provides signoff power throughout IDOE systems for a Financial Administrator.
- Data Exchange: ability to complete the certification (sign-off) of the six data certification submission cycles as it pertains to financial data counts.

School Administrator
This staff type is for principals--both public and non-public. It is recommended the School Administrator role be assigned to the director or principal within the school. Make sure assign to the StateOrganizationId of the school.

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- INview: supplement accountability data with pictures, text, and highlights for the school

w/Data Certification
- Data Exchange: Non-public School Administrators are responsible for the review and certification (sign-off) of non-public school data.

Data Administrator
You might think of this as the "state reporting" role. The staff type of Data Administrator is for staff who are responsible for reviewing the data validation results from either a template upload or direct flow of data from the SIS to the IDOE. It is recommended these staff have an overall knowledge and understanding of all student and staff data requirements.

- Data Exchange: Ability to see all errors, warnings, and conflicts in the submitted data.
- Data Exchange: Ability to export this information to excel for distribution to other staff for correction as needed.
- Data Exchange: Ability to view total student and staff counts for verification. T
- Data Exchange: Ability to utilize the templates to upload data not supported through the local student information system.
- Data Exchange: Ability to lookup STNs/SPNs (identities).

Data Viewer
This staff type is for person(s) who need View access only.
- Data Exchange: View only access to data

Data Certification
As covered above, this is a decorator staff type that adds additional functionality. This staff type adds the ability to certify (sign-off) on data.

- "LEA Administrator" + "Data Certification" –Generally for superintendents
- "School Administrator" + "Data Certification" –Generally for non-public principals
- "Financial Administrator" and "Data Certification" – Generally for corporations and non-public schools

Student Support Plans
This will provide the EdPlan Tile with access to the Indiana IEP/ IndianaILP System. This is a corporation role, so make sure to use the StateOrganizationId of the corporation.

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EdPlan System (Indiana IEP/ IndianaILP)

This is a corporation role, so make sure to use the StateOrganizationId of the corporation. New accounts are created within the EdPlan system when the educator clicks on the EdPlan tile the first time and "lands" successfully.

Data Exchange System

Please make sure that you have all of your LINK roles entered for Data Exchange. This Moodle course on Security Access and Roles in Data Exchange goes into detail. Less is more: Please be aware that some roles will conflict or lessen the access provided.

- **Data Exchange Contact** - A key contact that other schools may contact regarding state reporting. (A key contact role doesn't provide any access to systems or functionality)
- **Data Administrator** - the main state reporting role
- **Data Certification** - This role will ONLY work in combination with one of the following roles and should be limited to persons with the authority to sign-off on these data
  - **LEA Administrator** + **Data Certification** - Superintendent Sign-off for Public/Charters
  - **School Administrator** + **Data Certification** - Principal Sign-off for non-publics
  - **Financial Administrator** + **Data Certification**- Financial Sign-off for both LEAs and Non-public schools
- **Data Viewer** - Only assign to persons who don't have one of the above roles. Might be used for a data reporting person at a public school who is tasked with reviewing the Tier 2 validations for their school yet doesn't upload or run the validations for the corporation.

FSSA P-EPT System

The IDOE is providing the primary access point to the FSSA P-EBT portal through the LINK Portal. All public local education agency and accredited non-public school entities may access the FSSA P-EBT via the LINK portal. For other entity types, please contact FSSA. The P-EBT tile will be available to Security Coordinators and those who have the Data Administrator staff type. Information regarding P-EBT benefits including school and student eligibility may be found on the [FSSA: DFR Pandemic EBT website](#).

- **Help with submission in the P-EBT portal**: Select "Need Help?" from the P-EBT Portal navigation bar and complete the form.
- **Help with P-EBT Eligibility**: FSSA P-EBT website

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The INtelligrants System

Please note that there were two versions of INtelligrants. There is an on-premise version (which most other state agencies are using) and cloud-based one (which IDOE was using via the LINK Portal). At this time, IDOE is not utilizing the INtelligrants system for grants and the LINK INTELLIGRANTS tile has been removed from within LINK. For assistance with the Indiana Department of Homeland Security Grants, please contact grants@dhs.in.gov.

The Nimble System

Nimble is Indiana's Talent Acquisition Platform. The role of "Job Poster" will allow this LINK tile to connect with and access the account that has been setup within Nimble with the same email address for each local education agency.

A user who has not been setup with an account in Nimble may receive a "no user" error. If someone receives this message, they should contact the HR team at their district to help them get an account initialized in Nimble via the accounts. New local education agencies can reach out to support@hirenimble.com with their IDOE assigned corp numbers to request to be setup on the Nimble system. Please direct questions to support@hirenimble.com.

Frequently Asked Questions - General

We have a principal who has the correct info on the INview pages, but has the wrong email address on the roles page within the Security Portal.
IDOE utilizes the Superintendent and Principal contact information from LINK to update the INview website. For schools, make sure you are using the EducationOrganizationId of the school. If multiple key contacts are listed in LINK, IDOE will display the one with the latest begin date.

When I add a staff type, I am not able to add a name. Completing the name field is not an option. Am I missing something?
The name that appears in the Security Portal will appear once the person logs in successfully. This name comes from your local G-Suite or Microsoft 365 account. IDOE does not intend to utilize this name elsewhere and will utilize the name listed on the SPN for staff for other applications.

Are we not able to Edit existing Staff Type Assignments?   Looks like I only have the option to remove or add.
Correct. If the information is incorrect, please remove the information and re-add it. If you have an Ed-fi SIS, please modify the data in that location.

Phrasing is a bit confusing: Key Contacts being a part of the Staff Types, roles, et

Understand. Staff Type Assignment is Ed-fi terminology. Staff Type is the word that encompasses both Roles and Key Contacts. We wanted the Key Contacts to be separate from driving access to any system functionality, so it was abundantly clear who should be communicated with.

What is the difference between the Financial Administrator and Financial Contact?

The Financial Contact is a Key Contact and will only be utilized for communication purposes. The Financial Administrator is a staff type which drives security access in IDOE Applications; for example, they will be able to view information in Data Exchange and this staff type will be utilized in other IDOE systems.

Is there a way to search for an employee or print the security staff listing? We already have many pages of employees listed.

If you click on the "email" header, this will sort all the information by email address. We also intend for you to be able to filter these data by the column headers. Print/download functionality does not currently exist as we ultimately want these data to flow nightly from your Indiana Ed-fi compliant SIS.

Is there a way to download all the role assignment information?

Yes, a person with the role of Data Administrator can login to the Data Exchange system, go to the Submission tab. On this tab, at the top you can select the staffEducationOrganizationAssignmentAssociation and click "Export" to download a full list of staff types in Data Exchange/LINK Security Portal.

The staff member does not have a School Personnel Number (SPN). I thought this was for licensed educators only?

The SPN is simply a unique state ID. Any staff member who you wish to provide access to via LINK may have an SPN. Please work with the person who does your state reports to request one via the STN Application Center. This person will perform a lookup on the person's information (They will need DOB and Last4 SSN). Upon finding no matches, an SPN can be requested. The SPN will be available for use within LINK the following day.

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