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Introduction

On April 20, the 2014–2015 ASPIRE Linkage and Verification process begins for principals and campus support team members. HISD uses the data gathered during this process to calculate teacher EVAAS® and Comparative Growth reports, which are used for the Teacher Appraisal and Development System and the ASPIRE awards.

What does the Linkage and Verification process look like?

Step 1: Campus Setup Period (April 20–24)
For principals and support team members

During this period, principals and support team members prepare campuses for the Linkage and Verification Period by ensuring all information is as accurate as possible. The Campus Setup Period happens prior to the Teacher Linkage Period. This helps campus-based staff complete their linkages in an accurate and timely manner.

During this period, principals and support team members:

1. Review teacher rosters to ensure all teachers have the appropriate rosters with which to link students.
2. Review all staff’s tentative eligibility, and submit any required override requests.
3. Review all staff tentative categorization and submit any required override requests. Some teachers may not be able to link students or complete rosters without a submitted override request.

Step 2: Linkage and Verification Period (April 27–May 15)
For campus-based staff

During this period, campus-based staff:

1. Review tentative 2014–2015 ASPIRE Award Program eligibility (including attendance) and categorization information by:
   A. Reviewing individual information (see the Program Eligibility Document for details about ASPIRE Award Program eligibility).
   B. Discussing issues and/or potential corrections with the principal or campus support team for resolution.

   Please note: This is not the final ASPIRE Award Program eligibility, as some rules cannot be calculated until after the school year has ended.

2. Complete the linkage process to accurately attribute instructional influence for the students they teach.
   A. During the period, staff have the opportunity to request necessary corrections.
Step 3: Principal Confirmation Period (May 18–22)
For principals

During this period, principals have their final opportunity to:

1. Review and approve student-teacher linkages.
2. Ensure all core foundation teachers’ rosters have been reviewed and verified.
3. Ensure students have been claimed for all applicable subjects.
4. Clear all actionable alerts.

Optional Workgroups
The ASPIRE team is pleased to offer optional workgroup opportunities at campuses throughout the district again this year. Back by popular demand, face-to-face workgroups are available to help principals, campus-based support teams, and teachers complete this process as accurately and timely as possible. Workgroups are offered during after-school hours and at campuses all around the district to be convenient for campus-based staff and afford everyone the opportunity to get the assistance they need. Please check the district map for a campus near you!

Workgroups are offered during the Campus Setup Period (April 20–24), the Linkage and Verification Period (April 27–May 15), and the Principal Confirmation Period (May 18–22).

For details on workgroups in your area, see the Optional Workgroups announcement on the portal.

Importance of Verifying Eligibility and Categorization and Linking Students

The Teacher Linkage Period is an opportunity for teachers to review student-teacher linkages for accuracy prior to analysis. It is extremely important to review, correct, and complete student-teacher linkages during the specified time period.

Remember: Student-teacher linkages submitted during the Linkage and Verification process are final.

Once linkages have been submitted to SAS® (which happens shortly after the process ends), the EVAAS® data are calculated. EVAAS® information is used, along with student achievement scores, to calculate teacher-level EVAAS® and Comparative Growth reports. Once these analyses have been done, they cannot be recalculated.

EVAAS® and Comparative Growth information is used in the Teacher Appraisal and Development System, for other HISD staffing decisions, and to calculate ASPIRE awards.
Key Dates and Activities

April 20–24  Campus Setup Period: Principals and support team members complete campus setup so that campus-based staff can complete the Linkage and Verification Period activities in the timeframe provided.

April 27–May 15  Linkage and Verification Period: all campus-based staff, including all core foundation teachers, complete eligibility and categorization review. Core foundation teachers of students in grades 1–12 complete student-teacher linkages.

May 18–22  Principal Confirmation Period: Principals review and approve class rosters, eligibility, and categorization.

New Improvements to the Linkage and Verification Process

HISD continues to improve this process every year—making it easier and more efficient for everyone involved. If you are principal or support team member “seasoned” in the Linkage and Verification process, please see the Brief Overview of 2015 Linkage Enhancements document for improvements to the BFK•Link® system this year.

Which Campus-Based Staff Should Complete Linkage and Verification?

Linkage: HISD teachers of students in the following grades and subjects will participate in the 2015 Linkage process:

- Grades 1–8 Reading, Language Arts (LA), and Math
- Grades 3–8 TELPAS*
- Grades 4–8 Science and Social Studies
- Teachers with any students in these courses:
  - Algebra I
  - English I and II
  - Biology
  - U.S. History

*TELPAS linkage is new this year. Please see the Special Cases document for a description of linkage for this “content area” and additional instructions.

These teachers must verify the students taught, indicate mobility, and claim the percent of instruction they provided students in their classes throughout the year. Please note: All core foundation teachers of students in grades 1–12 in classes requiring linkage must have students linked to them to be considered a core foundation teacher. This includes special education teachers and teachers of small classes.
Verification: All staff members who are assigned to your campus during the 2014–2015 school year should verify their tentative award information. For a complete description of eligibility rules and award groups, please refer to the Program Eligibility Document on the portal. Please note: Some award groups cannot be determined until after the Linkage and Verification process.

For additional details, see “Expected Linkages” on the “Link” page of the portal.

Principal/Support Team Member Responsibilities Managing Linkage and Verification—Checklist of Responsibilities

Please see the Principal Checklist on the portal.

Campus Setup Period

Accessing the System

Step 1: Go to www.houstonisd.org/ASPIRE and log in on the “My Resources” tab.

Step 2: On the “My Resources Home” page, in the “Link” section, click on “Link.”
You will now see the “Link” home page:

Symbols correspond to explanatory text below.

**Establishing a Support Team**
Campus-based support team members assist principals in completing all required tasks for the campus during the Linkage and Verification process, including:

- Adding and removing staff.
- Adding and removing class rosters.
- Submitting override requests.
- Modifying roster details when necessary.

To be part of a support team, the person must be assigned as a staff member on the campus. The support team will be visible to the staff on your campus on their “Link” page in the “Support Team” section so campus-based staff will know who they may contact for further support during the Linkage and Verification process.
Step 1: On the “Link” page, click **Change** in the “Support Team” section.

**Note:** When you select support team members, you are providing them with **all** of the capabilities to change teacher and class roster data through the ASPIRE portal. **Please be selective when adding support team members.** Most campuses do not require more than six support team members. Many campuses only require 1–2 support team members.

Step 2: To add someone to your support team: Check the box next to the staff member’s name. To remove someone from your support team: Uncheck the box next to the staff member’s name.

Step 3: Click **Return** to go back to the “Link” page.

**Reviewing Teachers and Classes**

Review a list of your 2014–2015 campus-based staff members who need to complete student-teacher linkages, and add or remove staff and class rosters as appropriate.

Step 1: On the “Link” page under the “School Setup” section, click **Review Teachers and Classes**. The “School Setup – Class View” page will display.
Alternative Views

Classes may be viewed and/or edited in the following tabs:

- **Class View**—Lists all teachers with each of their classes and number of students assigned to each class. This view provides all necessary functionality to review and correct teachers and classes. *Please note: This page defaults to show “Staff With Classes,” but users can change the default setting to show “All Staff,” “Staff Without Classes,” or “Rosters Without Students.”*

- **Staff View**—Lists all staff with classes, followed by all staff without classes. *Please note: This page defaults to show a count of the students assigned to each teacher for each tested subject, but users can change the default setting to show the number of rosters for each tested subject or for a selected subject.*

- **Subject View**—Shows all staff members who teach a particular subject and the number of students assigned to each teacher by grade level for each subject.

- **Grade View**—Shows all staff members who teach a particular grade and the number of students assigned to each teacher by subject for each grade level.

Editing Classes

In any of the “Review Teachers and Classes” views (Class View, Staff View, Subject View, Grade View), click on a staff member’s name to view that teacher’s class list.
Adding Classes
There are several ways to add classes:

Option 1: For staff who may be missing a class or two that are required to be verified, click the Actions button beside his/her name and select the “Add Class” option. A dialog box will display allowing you to enter the information required to add the new class roster.

Note: In most cases, it is not critical to enter the exact course name/number. In all cases, it is critical to select the correct course type (For example: “Algebra I” instead of “Math”).
Option 2: For staff who may be missing all core classes, select “Staff without Classes” in the drop down. Next, click the Actions button and select the “Add as Core Teacher” option.

A dialog box will display allowing you to enter the information required to create the new classes. Please be as detailed as possible with your categorization override comments. For more information on categorization overrides, click here.

Note: Staff Without Classes are not currently identified as core teachers. Adding the staff member as a core teacher submits an override to change their award categorization. Submitting the override allows you to Add Classes.

Once the staff has been changed to a core teacher, you may make adjustments to the rosters that have been created, including changing a “Reading” roster to a “Reading + TELPAS” roster, for example. Please see the Special Cases document for more information regarding TELPAS linkage.

Note: Adding subjects for a teacher creates empty rosters for the teacher to link students. Once you have requested an override to change a staff member to a core teacher, you may add additional classes for that teacher to provide linkages, if desired. If you do not add additional classes after submitting your override, the teacher will have only one roster of each type chosen in the Add a Core Teaching Staff dialogue box.
Option 3: For staff who may be missing a class shared by another staff member or incorrectly associated with another staff member, the Copy/Transfer link provides tools to quickly address these issues with the following options:
- Copying Classes
- Transferring Classes
- Copying Student Rosters
- Replacing Student Rosters

Adding Staff
When reviewing the Class View list, ensure all teachers who need to complete student-teacher linkages are listed and have the appropriate class assignments. If a teacher is not listed, he/she may not have class assignments to verify.

Adding Classes to Existing Staff
Step 1: Select “Staff Without Classes” from the “Show” drop down.
Step 2: If the teacher you are looking for is not listed, click the Add Staff button. For more information on adding staff, follow the steps below for “Adding Staff to Your Campus.”
Step 3: For a teacher who needs to have rosters added, click on the Actions button next to his/her name and select “Add Class.” For more information on how to add a class, see Adding Classes.

Adding Staff to Your Campus
Step 1: If staff are missing from the “Class View” tab, click the Add Staff button. Prior to attempting to add staff, please ensure that you have changed the default setting to “All Staff,” and that the staff member who is missing is not on the list.

School Setup - Class View

Clicking the Add Staff button will display the “Add Staff” page.

Add Staff
Use this page to search for a staff member you would like to add to your campus list.
Please Note: Principals can add core teaching staff and/or staff members that are hired and evaluated by that principal. If you are unable to find a staff member through the search, please contact the ASPIRE Award Support Team at ASPIREAward@houstonsisd.org for further assistance.

School: Elementary School Office

First Name Begins With: a
E-mail Address: 
Employee ID: [Search, Return]

<table>
<thead>
<tr>
<th>Add All</th>
<th>Staff</th>
<th>Employee ID</th>
<th>Organization</th>
<th>E-mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Hac</td>
<td>34</td>
<td>Elementary</td>
<td><a href="mailto:s1@houstonsisd.org">s1@houstonsisd.org</a></td>
</tr>
<tr>
<td>Add</td>
<td>Hall</td>
<td>74</td>
<td></td>
<td><a href="mailto:s2@houstonsisd.org">s2@houstonsisd.org</a></td>
</tr>
</tbody>
</table>

Clicking the Add Staff button will display the “Add Staff” page.
Step 2: Search for the staff member using one or two letters of the first and/or last name, or use one or more of the other search criteria.

Step 3: Click Add to add the staff member to your campus. If the Add button is not highlighted, then the staff member already appears your staff list. If this is the case, please return to the “Class View” page and select “All Staff” from the “Show” drop down.

Step 4: Click Return to go back to the “Class View” tab.

The “School Setup – Class View” page defaults to show “Staff with Classes” in the drop down. To view other staff selections (All Staff, Staff without Classes, etc.), click on the “Staff with Classes” drop down and select the option you wish to view.

Copying or Transferring Classes
To save time in setting up rosters, this feature allows you to:

- Copy rosters from one teacher to another—resulting in both teachers with the exact same roster of students to verify. For example, this may be helpful in the situation of co-teachers, when two teachers share a class roster.
- Transfer a roster from one teacher (Mr. Hammond) to another teacher (Ms. Cunningham)—resulting in only the “target” teacher (Mr. Hammond) having the roster to verify. The roster will be removed from the original teacher (Ms. Cunningham). This may be helpful when, for example, classes were reassigned during the school year.

To copy a class:

1. Click the Actions button and select “Copy/Transfer.” Next, select “Copy Class,” and the click the Continue button.
2. To transfer the current months and percentage of instruction settings with the student, click the Continue button in the “Include membership and % instruction” box.

**Include membership and % instruction**: The months and percentage of instruction in the class roster will be transferred with the students. **This selection is recommended.**

**Default to entire term and 0% instruction**: The months and percentage of instruction in the class roster will **not** be transferred, and default values (From: Aug./Sept. to May/June, % Instruction is 0%) will be used instead. **This is not the recommended selection.**

3. In the “To” box, select the staff member to whom to copy the information, and click Copy Class. **Principals and support team members have the option to “Change” the class during this process.** For example, if Mr. Hammond teaches language arts to a group of students and that class was pre-loaded for Mr. Hammond, but Ms. Cunningham teaches those same students math, and math was not pre-loaded for Ms. Cunningham, you may wish to copy Mr. Hammond’s language arts class to Ms. Cunningham, but change it to math in the process.

4. Click the OK button to confirm this action. The original teacher’s data does not change. A new class is created for the recipient teacher.
To transfer a class:

1. Click the Actions button and select “Copy/Transfer.” Next, select “Transfer Class,” then click the Continue button.

2. If you want to transfer the current months and percentage of instruction settings with the student, click the Continue button in the “Include membership and % instruction” box.

Include membership and % instruction: The months and percentage of instruction in the class roster will be transferred with the students. This selection is recommended.
**Default to entire term and 0% instruction:** The months and percentage of instruction in the class roster will not be transferred, and default values (From: Aug./Sept. to May/June, % Instruction is 0%) will be used instead. **This is not the recommended selection.**

3. In the “To” box, select the staff member you would like the class transferred to, and click **Transfer Class**.

   **Note:** The class will appear as a “Deleted” class for the original staff person.

   ![class transfer example](image)

4. Click the **OK** button to confirm this action.

   ![class transfer confirmation](image)

   **Note:** If **all** rosters are deleted for a teacher, you should also request a categorization override, as teachers with no rosters and no student-teacher linkages cannot be considered as “core foundation teachers” for award purposes. See **Requesting Categorization Overrides**.
Copying Student Rosters
This function allows you to copy students from one class to another to create a new or expanded roster. Based on the example in the screen shots below, Mr. Hammond and Mr. Miranda taught the same 60 students Integrated Language Arts, Social Studies, and Mathematics. Instead of setting up those three class rosters separately, all students can be copied from Integrated Language Arts (Mr. Hammond’s class) to Social Studies and Mathematics (Mr. Miranda’s classes). This function can be used to copy students in Mr. Hammond’s roster to Mr. Miranda’s roster or from one of Mr. Hammond’s rosters into another one of Mr. Hammond’s rosters.

1. Click the Actions button and select “Copy/Transfer.” Next, select “Copy Student Roster,” then click the Continue button.
2. If you want to transfer the current months and percentage of instruction settings with the student, click the Continue button in the “Include membership and % instruction” box.

**Include membership and % instruction:** The months and percentage of instruction in the class roster will be transferred with the students. **This selection is recommended.**

**Default to entire term and 0% instruction:** The months and percentage of instruction in the class roster will not be transferred, and default values (From: Aug./Sept. to May/June, % Instruction is 0%) will be used instead. **This is not the recommended selection.**

3. In the “To” box, select the staff member to whom you would like the students transferred, select one or more of the available classes associated with that staff member, and click Copy Students.
4. Click the OK button to confirm this action.

All of the students in the roster you are copying will be put into another roster as well as any other students who are already in the receiving roster. For example, the roster you are copying from contains students A, B, C. The roster you are copying to contains students C, D, E, F. Once complete, the roster you are copying to will contain students A, B, C, D, E, F. Student C will not be duplicated, and Student F will not be “lost” or deleted.

This function allows you to replicate the class roster contents from one class roster to one or more class rosters for the same staff member or for other staff members.

Replacing Student Rosters
This function allows you to replace the students in one roster with students from a different roster. This could be used if, for example, a self-contained teacher completed his/her reading roster and wanted the rosters for all other subjects to be identical. Another example is in the case of a co-teacher situation, when both teachers should be linking exactly the same students at exactly the same percentage of instruction, which would result in exactly the same value-added analysis. Replacing student rosters with a completed roster would ensure the two were, in fact, exactly the same.

1. Click the Actions button and select “Copy/Transfer.” Next, select “Replace Student Roster,” then click the Continue button.
2. If you want to transfer the current months and percentage of instruction settings with the student, click the **Continue** button in the “Include membership and % instruction” box.

**Include membership and % instruction**: The months and percentage of instruction in the class roster will be transferred with the students. **This selection is recommended.**

**Default to entire term and 0% instruction**: The months and percentage of instruction in the class roster will not be transferred, and default values (From: Aug./Sept. to May/June, % Instruction is 0%) will be used instead. **This is not the recommended selection.**
3. In the “To” box, select one or more of the available classes for this staff member, and click Replace Student Roster.

![Image of Replace Student Roster]

4. Click the OK button to confirm this action.

![Image of Confirmation]

All of the students in the roster you are copying will replace any students who are already in the receiving roster. For example, the roster you are starting with contains Students A, B, C. The roster you are replacing contains Students C, D, E. Once complete, the roster you replaced will contain Students A, B, C. Student C will not be duplicated, and Students D and E will be deleted. Please note that the deleted students will appear in the “Deleted Students” section of the roster.

**Deleting Classes**

There are two ways to delete classes:

**Option 1:** To remove a class from a teacher, click on the teacher’s name, then click Delete beside the class name. This will remove the class from that teacher’s list of active classes and place it on a list of deleted classes for that teacher.

![Image of Deleting Classes]
Option 2: To remove a class from a teacher, click the **Actions** button beside the class name and select the **Delete** option. This will remove the class from that teacher’s list of active classes and place it on a list of deleted classes for that teacher.

Restoring a Deleted Roster
Deleted classes can be reviewed and restored by clicking on the teacher’s name and reviewing the “Deleted Classes” section at the bottom. Click “Actions,” then **Restore** to move the class roster back to the active list of rosters for that teacher. If the roster was verified and submitted when deleted, restoring the roster will also restore the verified information in the roster.

Reviewing Award Eligibility and Categorization
This task involves reviewing a list of your 2014–2015 campus-based staff members’ award groups and eligibility and requesting overrides as necessary. On the “Link” page in the “School Setup” section, click **Review Award Eligibility and Categorization**.

**Note:** Campus-based staff members, including principals and support team members, will be able to see their information in the “Tentative Award Information” section in the middle of their “Link” page beginning on April 27, 2015. All campus-based staff (including principals and support team members) are asked to verify their award information during the Linkage and Verification Period, April 27–May 15.
Step 1: Review ASPIRE award eligibility and categorization:

1. Ensure all staff members that worked on your campus during the 2014–2015 school year are listed.

2. The **Eligible** column shows a green check mark or a red X, indicating that staff are either eligible or not eligible at this time. Clicking on the symbol in the column will take you to that employee’s eligibility screen, allowing you to see which criteria have been met or not met for eligibility. It also allows you to submit an override, if desired, for the different eligibility criteria. The reason for ineligibility as supported by data will be listed next to the eligibility rule. Note that all eligibility requirements must be met to be considered as eligible for the ASPIRE award.

   If you suspect an error, you can review the PeopleSoft source data (see below) used to determine eligibility. If after reviewing the information you still believe it is incorrect, you can request an override (see Requesting Eligibility Overrides).

3. The **Override Status** column beside the **Eligible** column shows you the status of any eligibility overrides you may have submitted for employees on your campus. Here, principals and support team members may see overrides that are “Pending,” “Approved,” or “Rejected.”
4. The **Organization** column shows you the campus from which awards for staff on this list will be calculated. Any staff members who have transferred to or from your campus during the 2014–2015 school year will be listed, but will also show an organization other than your campus if appropriate.

Staff members who worked at your campus *and at* other campuses during the school year **at the same time** will be listed, but will need you to submit an override request to indicate the appropriate percentage of time the employee was assigned to your campus. Campus-level ASPIRE awards are distributed at the appropriate percentages (i.e., 40% for 2 days/week, 60% for 3 days/week, etc.). **"% Campus"** shows the percent of a person's ASPIRE award that will be earned from your campus. This will be 0% for anyone who served your campus less than 40% of the time, or for anyone who was at your campus for less than the majority of the school year. Those who worked on your campus the majority of the year will likely be represented as 100%. If you believe this to be in error, then you can request an override on the category and change the percentage (see Requesting Categorization Overrides). For teachers who transferred to or from your campus during the school year, the campus-level ASPIRE awards are based on where staff spent the **majority of the year**.

5. The **Category** column shows the current, preliminary categorization for all staff members. Teachers for whom linkage is required show at this time as category “1/2/3.” Categorization is split into either 1, 2, or 3 **after the linkage process is complete, and after value-added analyses are calculated**. This is because we cannot tell during linkage which teachers will be Group 1 (Teachers With EVAAS®) or Group 3 (Teachers Without EVAAS®) until after the analyses have been completed with the submitted linkages.

Clicking on a staff member’s categorization will take you to that employee’s categorization screen, allowing you to see categorization details and to submit an override, if necessary.

Staff award categories will match the award groups listed in the **Program Eligibility Document**. There are a few exceptions not listed in the document to which you need to pay particular attention:

- Staff members listed with an “X” under the category column (i.e., X5. Apollo Tutor) are not eligible and not considered for awards based on data from Chancery and PeopleSoft. You may request a category override (see Requesting Categorization Overrides). If an eligibility override is also required, then please be sure to request that as well (see Requesting Eligibility Overrides).
- Staff members listed with a “Z” under the category column (i.e., Z2. No Chancery data) could not have a categorization computed by the system and **need your review**. Be sure to request overrides on all staff placed in the “Z” categories (see Requesting Categorization Overrides). No staff should remain in these groups at the end of this period.

6. The **Override Status** column beside the **Category** column shows you the status of any categorization overrides you may have submitted for employees on your campus. Here, principals and support team members may see overrides that are “Pending,” “Approved,” or “Rejected.”
7. The **Member Acknowledged Eligibility & Categorization** column shows a green check mark for staff who have clicked the Acknowledge button during the verification period, open from April 27–May 15, 2015. A red X will appear for staff who have not yet verified their position.

**Please note:** *This column does NOT determine award amounts! A green check does not guarantee an award amount, and a red X does not prevent the staff member from receiving any calculated award!* This column is for principal and support team information purposes **only**.

For more information and to view details, click on the teacher’s name, eligibility, or categorization. Click the “Source Data” tab at the top of the screen to see various source data used to determine award groups, eligibility, and transfer information.

**Staff Details**

<table>
<thead>
<tr>
<th>Viewing - Agu</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Eligibility</strong></td>
</tr>
<tr>
<td>Fall Snapshot</td>
</tr>
<tr>
<td>PeopleSoft Harmless Action Periods</td>
</tr>
<tr>
<td>Student Information System Course Summary</td>
</tr>
</tbody>
</table>

**Tip!** You can use the source data to see all dates and hours that employees were absent—and whether or not those absences were used in determining eligibility.

**Step 2: Request Overrides:**

1. For any of the information that you see that is in error, you have the ability to request an override for each item that is incorrect. For example, if someone does not meet eligibility criteria 1 and criteria 4, you will need to request an override **for each criteria**. Override requests are reviewed and either approved or rejected by Research and/or Human Resources. You will see changes appear on the report as well as receive an e-mail notifying you when an override review is completed.
Requesting Categorization Overrides

After viewing details by clicking on the teacher’s name or clicking on a group code, click “Request Override” on the “Categorization” tab.

When submitting an override request, please be as detailed as possible. For example, instead of submitting an override with the comment “Core teacher,” it would be more helpful to submit a comment such as, “Core teacher, responsible for the instruction of COURSE (four periods a day) and COURSE (three periods a day). Linkage is required for this teacher.” Since ASPIRE team members are reading and responding to override requests, it is important to let us know why a change is required. The more detailed you are in your override request comments, the more quickly ASPIRE team members can approve your request, and the less additional information will be requested of you.

Symbols on this diagram correspond to explanatory text that follows.

Tip! Open up the Comments History to see comments on overrides that may have been previously submitted, as well as the responses to those previous override requests.
Complete the following steps to request a categorization override:

1. Select an override category.

2. “Add Detail” for core foundation categorization overrides. “Detail” is the core foundation subject taught.

3. Update “Evidence” if needed (evidence can be seen by staff member).

4. Provide specific comments in support of the override. Override comments cannot be seen by staff members, and should explain—why an override is required.
   - Example of a detailed comment: Ms. Barnett teaches reading (RDG1605Y) for four periods and PE for one period. This schedule is for Monday through Friday. She has been teaching these courses since November 15, 2014.
   - Example of a comment that needs more detail: Ms. Barnett is a core teacher.
   - Example of a comment that needs more detail: Ms. Barnett is a BAC teacher.

5. Click Save to request the categorization override.

Note: Adding detail for a teacher member does not create classes for the teacher to link students. Once you have requested an override to change a staff member to a core teacher, you must create classes for that teacher to provide linkages. If you do not add classes after submitting your override, the ASPIRE team member may deny your override request, citing insufficient evidence. See Adding Classes for more information.

Requesting Eligibility Overrides
Click on the “Eligibility” tab and click Request.
The “Eligibility Override” dialog box will display.

Complete the following steps to request an eligibility override:
1. Check to make sure that the “New Eligibility” displays the desired new eligibility.
2. Provide specific comments in support of the override.
   - Example of a detailed comment: Ms. Ramirez was on FML, approved by the HR Business Partner from 11/15/14 through 2/1/15. She returned from FML, but source data does not show those absence hours as protected.
   - Example of a comment that needs more detail: Ms. Ramirez was on FML.
   - Example of a comment that needs more detail: Ms. Ramirez has a note from her doctor.
3. Click Save to request the eligibility override.

**Linkage and Verification Period**

Once staff lists and class rosters have been adjusted as necessary and confirmed, the next step is for principals and support team members to oversee and support campus staff in completing Linkage and Verification. It is important that principals and support team members monitor staff progress and follow up as necessary. Specifically, principals and support team members should:
- Facilitate teacher/staff training
- Review completion report
- Review student instruction
- Review and correct alerts
- Review informational notifications

**Facilitating Teacher Training**

Two video tutorials for teachers are available on the portal. These can be used during teacher training to prepare for the Linkage and Verification process.
1. **Watch Video Overview** provides an overview of why teachers are participating in the linkage process. This video is available on the “Link” page in the “Resources” section.

2. **Watch Video Tutorial** provides an overview of the linkage process. This video is available by clicking the Watch Video Tutorial link in the “Roster Verification” section of the “Link” page.
Optional Workgroups
The ASPIRE team is pleased to offer optional workgroup opportunities at campuses throughout the district again this year. Back by popular demand, face-to-face workgroups are available to help principals, campus-based support teams, and teachers complete this process as accurately and timely as possible. Workgroups are offered during after-school hours and at campuses all around the district to be convenient for campus-based staff and afford everyone the opportunity to get the assistance they need. Please check the district map for a campus near you!

Workgroups are offered during the Campus Setup Period (April 20–24), the Linkage and Verification Period (April 27–May 15), and the Principal Confirmation Period (May 18–22).

For details on workgroups in your area, see the Optional Workgroups announcement on the portal.

Monitoring Teacher Completion
Monitoring teacher completion during the Linkage and Verification Period allows you to view which teachers have submitted and reviewed their rosters for approval while teachers still have the ability to complete the process themselves. All teachers who are required to provide student-teacher linkages and percentages of instruction should submit them before the end of the Teacher Linkage Period. If teachers do not complete student-teacher linkages during the designated period (because they are on leave, etc.), then principals/support team members must do it for them. It is important for principals and support team members to monitor teacher completion during the Linkage and Verification Period and encourage those who have not completed the process or cleared their own alerts to do so by the deadline. This will reduce your workload during the Principal Confirmation period.

While it is recommended that teachers review their own class rosters, there are times when it is necessary for support team members and principals to make changes and/or complete the process for some teacher. The examples provided below are not meant to be all-inclusive; rather, they are meant to show some possible scenarios that may occur at your campus.

Examples of when a support team member or principal may need to modify teachers’ rosters:
1. The teacher did not clear his/her own alerts during the Teacher Linkage Period.
2. The teacher did not take the opportunity to clear alerts/modify percentage of instruction and left students over-claimed.
3. The teacher forgot to link some students (i.e., new students).

Examples of when a support team member or principal may need to complete teachers’ rosters:
1. The teacher is on FML or some other type of leave and cannot complete his/her own rosters.
2. The teacher left the district, but the principal or teacher would like for the teacher to have a value-added report.
3. The teacher did not take the opportunity to complete his/her rosters, but these rosters are required for analysis, which is required for appraisals.
4. The support team did not setup a required roster for a teacher during the campus setup period; therefore, the teacher was unable to complete the Teacher Linkage process.
5. One or more subjects or grade levels are missing for a campus because of missing rosters or teachers who did not complete rosters.
To access the Teacher Completion report:

1. Click on Monitor Teacher Completion.

2. Click on the teacher’s name to view his/her individual rosters.

During the Teacher Linkage Period, principals and support team members have the ability to:

1. Monitor completion and remind teachers who still need to verify and submit their rosters to do so by the end of the Teacher Linkage Period (May 15).
2. Verify and submit rosters for teachers on leave.
3. Add any rosters that may still be missing for teachers.
4. Delete rosters that are incorrectly assigned to teachers.
5. Copy or transfer completed rosters from one teacher to another.

By focusing on these tasks during the Teacher Linkage Period (rather than during the Principal Confirmation Period), principals and support team members will save themselves a lot of work during the Principal Confirmation Period!
**Reviewing Student Instruction**

The Review Student Instruction report indicates “flagged” students that may have been omitted from a core content area or may have been over-claimed or underclaimed by the teacher(s).

**Note:** Teachers will be making changes during this period, which will affect the Student Instruction reporting displayed.

It is important for teachers to address and/or clear their own alerts during the Teacher Linkage Period (April 27–May 15). An alert does not necessarily indicate an error. And while all alerts may not be resolved, teachers should understand them.

To access the Review Student Instruction report:

1. Click Review Students. The “Review Students” page will display.

2. Use the filtering options to view certain kinds of students (i.e., over-claimed students for math).

3. Click on the student’s name to see all of the rosters where that student has been claimed, as well as the teachers who have claimed that student.
Filtering Information on the Student Report

Filter the data displayed on this report using the options available in the drop down labeled “Show.” You may also limit data displayed on this report using the “Grade” filter. When high school courses are displayed, you may similarly filter by content area.

- **🚫** indicates that the student was not found on a roster in that content area. Depending on your campus, some of this information may be correct—for example, if there was not a teacher of record for a particular grade/subject on your campus (i.e., a long-term substitute or an hourly lecturer taught the class). In other cases, students may have been accidentally or inappropriately deleted from rosters, and should be re-assigned to the correct teacher.

- **谡** indicates that the student is underclaimed. Underclaimed students may be acceptable in some situations. One example of acceptable underclaiming of students is when instruction is shared and one of the teachers is not required to complete student-teacher linkages. Another example is when a teacher left for an extended period of time during the school year, and students were with a long-term substitute who should not be linking students.

**Note:** If a student is not claimed at 100%, it does not necessarily mean that an error has occurred. It just means that this requires further investigation. The important rule to remember is that the instruction represented should model the actual instructional practices as they occurred for this student on your campus.

- **➕** indicates that the student is over-claimed. Over-claimed students should be corrected so that instruction totals 100%. For example, multiple teachers may claim a student at 100%, which will cause a student to be over-claimed. This should be corrected at the campus-level. Over-claimed students may be acceptable in some situations.

Some examples of acceptable overclaiming include:

- Three (or more) teachers provide instruction for the student for the same months, and the decision was made that all teachers would receive the same percentage. If three teachers are all responsible for instruction, the appropriate percentage would be 33.3% instruction each. Since this percentage cannot be selected in a roster, all three teachers claiming the student(s) at 100% time each would mathematically result in each teacher being attributed with 33.3% instruction for the student(s).
A student appeared on multiple rosters for the same teacher. The teacher linked the student on more than one roster, at 100% instruction. Since the student is over-claimed, but all instruction is still only attributed to one teacher, mathematical reduction would result in the teacher being attributed with 100% instruction.

**Note:** In cases where students remain over-claimed upon final submission, the teachers’ instructional claims on a student will be mathematically reduced proportionately until the combined total is 100%.

- A green checkmark indicates the student’s instructional claims totaled 100% for that content area.

To review issues with specific students on the Review Student page, click on the student’s name. Clicking on a student’s name will bring up a box that allows you to review instructional details for each content area. In the example below, we see that the Math teacher has not yet completed his student-teacher linkages indicating a percentage of instruction for this student. We also see that two Social Studies teachers have linked this student at 100% instruction each. This is likely a situation that will need to be corrected.

**Note:** During the Linkage Period, teachers can and should make corrections to their own rosters. Once linkage ends, principals and support team members will need to make the roster corrections on behalf of the teachers.

In the above example, the principal/support team member should do the following to correct the data for social studies:

- Contact Mr. Fuentes and Mr. Lloyd and ask them to make the corrections within their own rosters (if the Teacher Linkage Period is still open). **This is the preferred option!**
- The principal/support team member can find this student within Mr. Fuentes’ roster and Mr. Lloyd’s roster and make the corrections within each of those rosters. **This is the only option if the Teacher Linkage Period is closed.**

**Note:** Review student instruction prior to the closing of the linkage period so that you can have teachers correct their own errors!
To view the history of changes made to a class, choose “View Class History” from the Actions button on a roster.

**Note:** When changes are made to teacher linkages or rosters, the date of change and the staff member who made the changes are documented within the underlying data on the ASPIRE portal. Teachers will also be informed by email if any changes are made to their rosters after they have submitted the rosters for approval.

Now Available! Teachers, support team members, and principals can see the changes that were made to their rosters—and by whom these changes were made.
Reviewing Alerts and Notifications
Some alerts may not be actionable, but are meant to expose possible issues to address. You can review the following alerts and notifications:

Award Categorization Alerts
- Group 1/2/3 with no subjects—**Actionable**!
- Uncategorized staff—please reconcile—**Actionable**!

Award Informational Notifications: These are not alerts, but rather informational notifications, provided to give principals and support team members “at a glance” information. In most cases, no action is required.
- Ineligible staff
- Ineligible staff due to attendance only
- Staff assigned less than 100%
- Staff on your campus assigned at a different campus
- Staff opted-out
- Ineligible staff due to growth plan/PPA

Student Completion Alerts: These alerts are actionable, but at the principal/support team member’s discretion.
- Student claimed more than 100%
- Students claimed when not expected
- Students claimed less than 100%
- Students not on roster

Teacher Completion Alerts
- Group 1/2/3 with unfinished linkage data—**Actionable**!
- Rosters with no students—**Actionable**!

If an alert exposes an issue that requires correction, then you may do so during this process. You may refresh alerts immediately by clicking **Refresh Alerts** at the right of the Alerts and Notifications section.

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**Remember:** Student completion alerts are for your information, and for your action if necessary. The information presented to you may need to be corrected—or may not. Only you can decide! Rosters and student-teacher linkage should reflect campus practice. If there is a logical reason why there are no students on any 4th grade math rosters at your campus, you should have a lot of 4th graders in the “Students not on roster” alert! Please contact the ASPIRE team before you worry, so that we can help you figure out if there is a need to worry.
To review alerts, click on the number of alerts to the right.

After you click on the alerts, a list of students which require review appears. Click on View/Edit to review the student's details.
You may enter into rosters from this screen to make changes to the student for whom there is an alert.

To hide/ignore an alert, click the checkbox next to “Hide Alert.” Any changes to hidden alerts will require you to refresh alerts. Only principals and support team members have the ability to hide alerts.

**Viewing Hidden Alerts**

If you find you need to review the alerts that were previously hidden, you may need to “unhide” those alerts. To view all hidden alerts, click the Review Acknowledged link in the Actions button in the Alerts section.

Clicking on Review Acknowledged pulls up a list of students with hidden alerts. You may then review only those students, and make changes if desired.
Principal Confirmation Period

Once the Linkage period has closed, principals must conduct a final review to ensure all class rosters have been completed, appropriate students have been claimed, and all actionable alerts have been cleared. While support team members may assist with this process, the principal must complete the final approval (see Approving Rosters).

Reviewing Student Instruction

When the Linkage and Verification process is over, any remaining student instructional claims issues that need to be resolved will need to be done by the principal and/or support team. Teachers no longer have access to change their rosters.

Click on Review Student Instruction to review any remaining “flagged” students, making certain to correct any remaining issues. Refer to details regarding student instruction above, in the “Linkage Period” section of this document.
A green checkmark will show for students with no alerts. Students who are over-claimed or underclaimed will show a yellow circular symbol. Students not on a roster for a particular subject area will show a red circular symbol. Students for whom the alert has been “hidden” will show a green checkmark with an asterisk.

**Remember: Student completion alerts are for your information, and for your action if necessary.** The information presented to you may need to be corrected—or may not. Only you can decide! Rosters and student-teacher linkage should **reflect campus practice.** If there is a logical reason why there are no students on any 4th grade math rosters at your campus, you should have a lot of 4th graders in the “Students not on roster” alert! **Please contact the ASPIRE team before** you worry, so that we can help you figure out if there is a need to worry.

### Reviewing Alerts and Notifications

A thorough review of any remaining alerts and notifications—to correct any remaining issues that can be addressed—should be completed prior to approving class rosters. Refer to details regarding alerts and notifications **above**, in the “Linkage Period” section of this document.

### Reviewing Submitted Roster Summaries

Click on Review Rosters to see a summary by teacher of significant changes made to rosters. This may include students added or deleted and any students included on a roster at some value other than 100%. This view does **not** allow the principal or support team to see all students claimed or all months and percentages; it **only** provides a summary of “significant changes” made to this teacher’s submitted rosters.

In addition, principals may approve the rosters on an individual roster basis (click Approve for each summary) or by teacher (click Approve All to approve all submitted rosters for this teacher only). To see a complete roster submitted by a teacher, click View.

**Tip:** It is not necessary to approve each individual roster. The final step allows you to approve all rosters on your campus with one click. **But please note!** Once approved, individual rosters must be reopened in order to make further changes. There is no “one click” to re-open all rosters at a campus.
Approving Rosters (Principals Only)
The last step of ASPIRE Verification is to approve all submitted rosters. Clicking on Approve Rosters will lead you through a four-step final approval process, including:
1. A review of the teacher completion report (described above)
2. A review of the student instruction report (described above)
3. A final approval of all submitted rosters (described above)
4. A final approval for your campus and completion of the ASPIRE Verification process

Note: This process may be completed more than one time during the Principal Confirmation Period if necessary. But once rosters have been approved, the principal must re-open a roster to make any changes that might be necessary!

Approve Button: After reviewing the teacher completion report, student instruction report, and roster approval one final time, click the Approve button to approve all remaining submitted rosters and complete the ASPIRE Verification process for your campus.

Note: Support team members will not see the Approve or Approve School buttons, as only principals have the ability to approve rosters. Only principals will see the Approve button.

The following message will appear at the top of the “Link” page to confirm the final approval:
Support Resources

Username and Password Support
The HISD Help Desk is available for username and password assistance at (713) 892-7378. Help Desk staff will only provide username and password support, and are not in the position to answer questions related to the ASPIRE Linkage and Verification system or process. You may also use the “Forgot Password?” feature on the portal.

Charter school employees who do not know or remember their username should email ASPIREAward@houstonisd.org for assistance.

Optional Workgroups
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For details on workgroups in your area, see the Optional Workgroups announcement on the portal.

Online Support
Principals and support team members can submit an electronic help ticket if they need assistance during this process.

My ASPIRE Home
These tickets will receive first priority for resolution or response, and all other tickets will be responded to on a first-come, first-served basis. General support for all instructional and support staff will be available through the Support System on the portal. Users submit questions online, and a “case” or support ticket is created. If you submit a question online, you will have to log back into the portal to review responses.
BFK Help Desk: Navigating ASPIRE Portal and BFK•Link® Support
Battelle for Kids’ Help Desk is available at (866) 543-7555 Monday through Friday from 7 a.m.—5 p.m. to help with:
- Accessing the ASPIRE portal
- Logging into the ASPIRE portal with username and password
- Locating/navigating the BFK•Link® system
- Locating campus support team members as listed on the “Link” home page
- Locating missing students
- Adding missing students to the ASPIRE portal (note that the Help Desk cannot add missing students to rosters, only to the portal itself)

Questions should be specific to the Linkage and Verification process only—not to EVAAS® value-added reports or the ASPIRE Award Program.

Campus-Level Support
Instructional and support staff members should seek assistance from their principal and support team members. The support team is displayed on the “Link” page. Phone support for the Linkage and Verification process will not be available for instructional and support staff.

Questions about the 2014–2015 ASPIRE Award Program
Staff members are encouraged to review the 2014–2015 award program materials on the ASPIRE portal here. If you have questions regarding the ASPIRE Award Program, please contact ASPIREAward@houstonisd.org. Thank you!