

Appendix C

Student Data System (SDS) User Guide

This Appendix will be distributed at Supervisor Training

Appendix D

NAEP 2005 Staff Recruiting Overview

And

**Field Recruiting System (FRS)
Overview**

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1. STAFF RECRUITING OVERVIEW

1.1 NAEP Field Plan for 2005

Through the years NAEP has relied on an experienced, well-managed and well-trained field staff, including field managers, supervisors, assessment coordinators (ACs), and assessment administrators (AAs). To estimate the number of staff needed for the assessments, we reviewed previous requirements for number of staff hours needed per school and more importantly, feedback from the NAEP assessments 2003 and 2004. This appendix provides an overview of the NAEP 2005 staffing plan and guidelines on using the Field Recruiting System (FRS) to recruit, hire and track the progress of fulfilling the staffing plan. Table 1-1 details the NAEP field plan for the NAEP 2005 assessment cycle.

Table 1-1. Field plan for the NAEP 2005 assessment cycle

Staff	Responsibilities	Work plan	Number required
Field Manager	Manage an assessment territory comprised of supervisor regions	June- to March 2005	16
Supervisor	Recruit staff	June – Nov. 2004	18
	Gain cooperation	Sept.- Nov. 2004	92
	Sample in schools and supervise ACs and all assessment activities in assigned region	Nov. 2004 to March 2005	175
Assessment Coordinators	Supervise AAs and contact schools for preassessment and assessment activities in their assigned area	Dec. 2004 – March 2005	1,000
Assessment Administrators	Conducts assessments in schools, in teams of two to five	January – March 2005	3,500

The numbers are derived from our actual experiences in 2003, the larger school sample, including the trial state and nonpublic school oversamples and the TUDA district samples, and the addition of science as an assessment subject. We will start with estimated staff needed by state and then once the sample has been finalized, we will determine exact needs by region and area.

Having a qualified and well-trained staff is very important in ensuring high participation rates and that the sampling and assessment of students are carried out to the highest standards. Westat offers a wage that attracts qualified candidates and allows them to work only after they have completed a background check and an extensive, in-person and distance training program. This procedure will ensure that the staff that we are sending into the schools is qualified. In addition, it is Westat's policy to hire ACs/AAs locally. This way, NAEP staff will closely match the demographic characteristics of the teachers in the areas where they conduct assessments. The *Staff Recruiting Magazine* (at the end of this Appendix) provides important information on recruiting and hiring staff for NAEP 2005.

1.2 Staff Roles

For NAEP 2005, an assessment team consists of two to five AAs reporting to an AC, five to six ACs reporting to a supervisor, and 12 to 15 supervisors reporting to a field manager. Exhibit 1-1 details the organization structure of the NAEP 2005 field team.

Field managers work closely with the State Coordinators; schedule schools; manage and participate in staff recruiting; manage and participate in school recruiting; and supervise staff.

Supervisors have responsibility for making the initial contacts to recruit all nonpublic schools, assisting in the recruitment of the ACs and AAs; conducting introductory meetings with schools to explain the role of the school in the assessment; selecting the samples of students; sending the preassessment packets to schools; and monitoring the progress and quality of the assessments. A Troubleshooter supervisor is hired for each territory to assist with quality control monitoring.

Each **Assessment Coordinator (AC)** works with approximately 25 schools and begin work in early December 2004. The ACs have responsibility for coordinating and supervising the assessment team activities in the school; reporting the results of the assessment; assisting with the student sampling and preparing the preassessment packets; conducting the preassessment contacts; and securing all assessment materials. ACs lead a team of local AAs as they complete the assessments in the schools and report weekly on the status of their work to their NAEP supervisor. See the Assessment Coordinator Fact Sheet (Exhibit 1-2) for a full listing of the AC responsibilities. Each supervisor will also have a troubleshooter AC assigned to their region to assist where needed in the region.

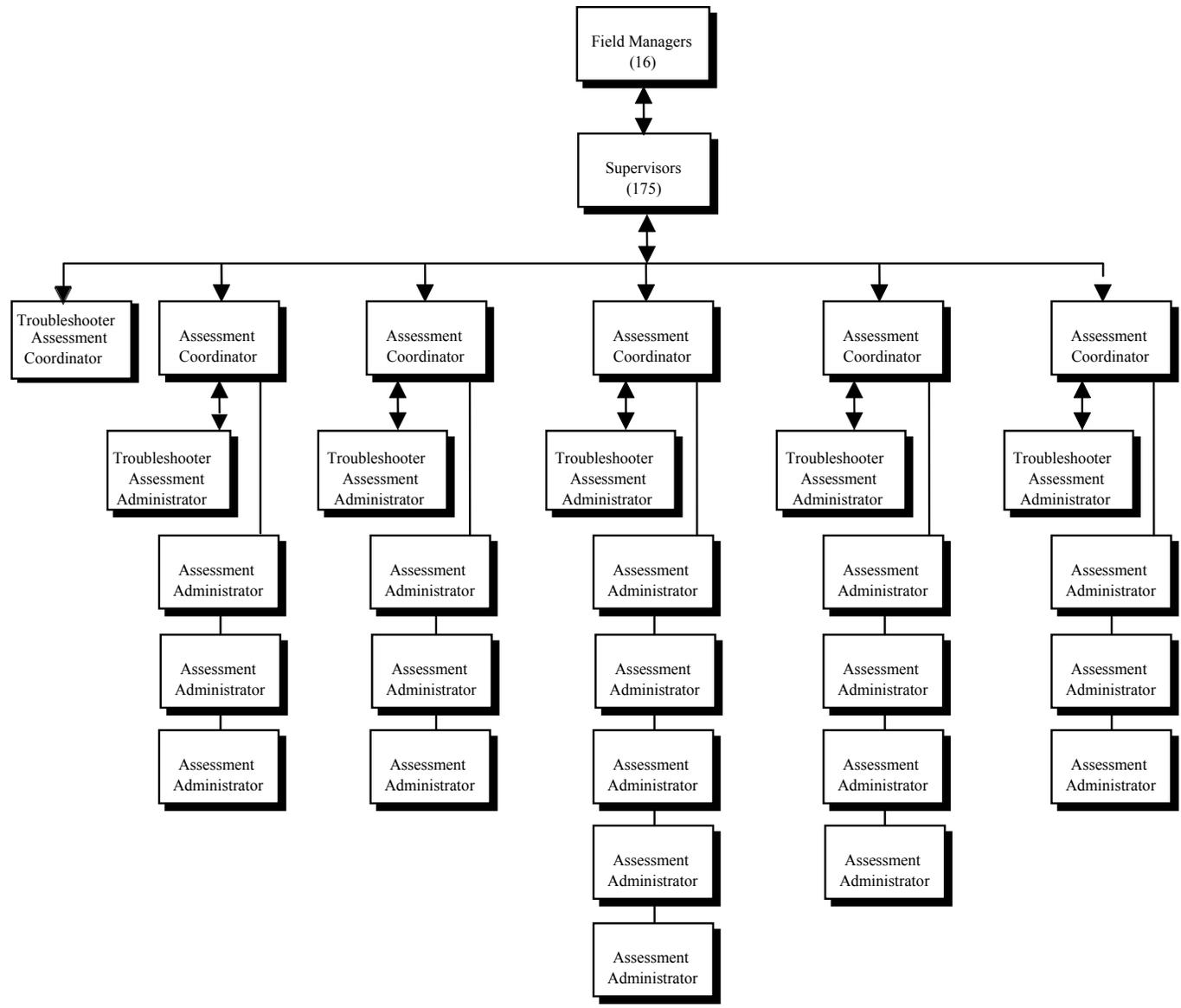


Exhibit 1-1. NAEP field staff organization structure

Exhibit 1-2. AC Fact Sheet - Page 1

NAEP ASSESSMENT COORDINATOR (AC) FACT SHEET

ABOUT NAEP

Since 1969, the National Assessment of Educational Progress (NAEP) has gathered information about the educational achievement of U.S. students. The purpose of the national assessment is to collect data to aid educators, legislators, and others in improving the educational experience of America's young people. For the current cycle of assessments, students who are in grades 4, 8, or 12 will be assessed. The U.S. Department of Education has contracted with Westat to conduct the sampling and administration of the assessment program for NAEP. For more information about Westat or NAEP, visit their Web sites at www.Westat.com or <http://nces.ed.gov/nationsreportcard>.

ROLE OF THE ASSESSMENT COORDINATOR

Westat will be hiring assessment coordinators (ACs) across the country. The ACs primary duty is to manage the assessment activities in approximately 25 schools including supervising a team of four to six assessment administrators (AAs), who administer the tests to students. Each assessment coordinator (AC) is hired to perform and is expected to exercise independent judgment and discretion in the following areas:

- Negotiating with schools to set assessment schedules in accordance with the special needs of the school population and the school calendar.
- Determining staffing requirements for carrying out the assessments based on each school's schedule.
- Monitoring AA training and providing guidance as needed.
- Planning work assignments for the AAs.
- Strategizing with other ACs to cover staffing needs in others areas.
- Directing the work of the AAs during assessments.
- Submitting written and verbal weekly reports to supervisor documenting team activities, updating status of work assignments, identifying problems areas and proposing solutions.
- Monitoring staff performance, productivity and efficiency.
- Recommending personnel actions for AAs that includes approving hours worked and completing evaluations.
- Performing quality control checks of assessment materials, both prior to and after the assessments.
- Dealing with unforeseen circumstances and creating contingency plans when schedules change abruptly.

Other responsibilities may include: conducting assessments on an emergency basis; functioning as team leader in the preparation of pre-assessment materials, assembly and security of assessment materials prior to assessment administration; and, packing and securing of post-assessment materials prior to shipment to scoring contractor; and sampling activities.

THE ASSESSMENT COORDINATOR'S WORK SCHEDULE

The ACs will work from early December, 2004 to early March, 2005. ACs will be trained in early December and begin work immediately following training. Activities in December and the first part of January will be preparing for the assessment period that begins in schools from January 24 through March 4, 2005. In most cases, the schools assigned to an AC will be local to where the person lives. ACs will be expected to use their own automobiles to travel to the schools and will be reimbursed at the published IRS business mileage allowance. Currently, this mileage rate is 37.5 cents per mile, but it can fluctuate. Traveling positions are also available that will require extended time away from home. ACs expenses for hotel and per diem for overnight travel will be paid according to established government rates.

Continued →

NAEP ASSESSMENT COORDINATOR (AC) FACT SHEET (continued)

TRAINING

AC candidates must attend an out-of-town, three-day training session in December 2004 and successfully complete the training program in order to work. Assessment coordinators will be paid for attending training and completing the home study before attending training. Travel expenses, food allowance, and accommodations will also be provided.

QUALIFICATIONS

Applicants should have professional education experience and have good communication and management skills. They must also pass an FBI background check.

Assessment Administrators (AAs) work with the AC in the local areas starting in January 2005. The exact number of AAs required in each area is determined by a number of factors, including the number of schools in the areas, the schedule of the assessments, whether the state signed up for the science assessment, and the estimated school enrollment. The responsibilities of the AA include preparing the assessment booklets before the assessment begins; conducting assessment sessions using prepared scripts; and completing the various post-assessment activities. See the Assessment Administrator Fact Sheet (Exhibit 1-3) for a full listing of the AA responsibilities. A troubleshooter AA is also assigned to each AC to assist where needed in the area.

Exhibit 1-3 AA Fact Sheet

NAEP ASSESSMENT ADMINISTRATOR (AA) FACT SHEET

ABOUT NAEP

Since 1969, the National Assessment of Educational Progress (NAEP) has gathered information about the educational achievement of U.S. students. The purpose of the national assessment is to collect data to aid educators, legislators, and others in improving the educational experience of America's young people. For each cycle of assessments, students in grades 4, 8 and 12, public and nonpublic schools are assessed.

The U.S. Department of Education has contracted with Educational Testing Service (responsible for the design, analysis, and reporting), Pearson Educational Measurement (responsible for processing the data), and Westat (responsible for sampling and administration of the assessment program), to conduct the NAEP. Assessment administrators (AAs) are part-time, temporary employees of Westat. For more information about Westat or NAEP, visit their web sites at www.Westat.com or <http://nces.ed.gov/nationsreportcard>.

ROLE OF THE ASSESSMENT ADMINISTRATOR

The primary role of the NAEP AAs is to conduct the assessment sessions in participating schools. Each assessment session lasts approximately one hour and a half. AAs administer the session to groups of approximately 30 students. It is the responsibility of the AA to prepare assessment booklets and materials, check attendance, read directions to students, monitor the sessions, and collect the booklets and other assessment materials. In addition, AAs ensure quality control is achieved by reviewing and coding the assessment forms, as well as assist in the packing and shipping of assessment materials.

Each AA reports directly to a local Westat assessment coordinator (AC). In addition to conducting the assessments, AAs also assist with other assessment-related activities and work with ACs to prepare for the assessments. AAs may work alone or with other AAs in conducting assessments in a given school.

THE ASSESSMENT ADMINISTRATOR'S DAILY WORK SCHEDULE

The field period for the assessments is January 24 through March 4, 2005. AAs should be available to work 30 hours per week during the field period. Twenty hours of work per week is guaranteed during the field period. The work schedule for AAs varies depending on location. AAs travel from school to school to conduct the assessments. AAs are reimbursed for local travel using their own automobiles at the rate of the IRS business mileage allowance, which can fluctuate. Currently, the allowance is 37.5 cents per mile.

AAs are paid for hours worked as directed prior to and during the field period

TRAINING

To work on NAEP, AA candidates must successfully complete a training session. Hired AAs are paid for time at training as well as time spent traveling to and from the session and time spent completing the home study.

QUALIFICATIONS

Applicants should be detail oriented and have good communication skills; have experience and enjoy working with students in an education setting; successfully complete the required training; be available for a minimum of 30 hours a week during the field period; and pass an FBI background check.

1.3 Staff Targets

Staff targets or goals are set for each field manager territory, supervisor region, and AC area. The number of targeted staff varies from state to state depending on the following:

- Number of schools in a state;
- If the state contains one of the selected district samples or the schools in the charter or nonpublic school oversample;
- Distance between schools;
- Any known scheduling problems (e.g., vacation periods, irregular school schedules, etc.);
- Average number of sessions in schools;
- Weather conditions during certain times of the year; and
- Size of the state.

Obviously, these factors will have a bearing on the schedules and work assignments. The field managers will determine the number of staff needed in each state.

1.4 Recruiting Process

The recruiting process begins with filling the targeted positions with staff utilizing the recruiting sources. When staffing each state, the first source considered is experienced Westat staff that have been successful on previous administrations of NAEP. Additional sources include Westat education-experienced staff that have never worked NAEP, staff in Westat's backup and applicant files, and non-Westat sources of people with education experience (i.e., the Retired Teachers Association, unions of retired Department of Defense teachers, educational newsletters and web sites, etc.). Chapter 2 of this appendix contains the details on all staff recruiting sources.

1.5 Schedule of Activities

Table 1-2 contains the schedule of NAEP 2005 recruiting and training activities.

The remaining sections of this appendix will cover the procedures for recruiting, hiring, and managing the staff related data in the NAEP FRS for the NAEP 2005 field staff.

Table 1-2. NAEP 2005 schedule of recruiting and training activities

Activity	Date
Availability Mailer sent	May 2004
Staff Recruiting Team Training	June 2004
Recruit Staff	June –December 2004
Supervisors hired	June – September 1, 2004
Supervisor Staff Recruiting, Sampling and Data Collection Activities Training	November, 2004
ACs hired	June – November 1, 2004
AC Trainings	December 2004
AAs hired	June – December 10, 2004
AA Trainings	January, 2005

2. RECRUITING SOURCES

NAEP has several sources that can provide good field staff candidates. In addition to the qualified and experienced NAEP staff, we will have access to Westat education-experienced staff that have never worked for NAEP, previous NAEP staff that have a summary evaluation of “2” and education-experienced applicants. Following these primary sources of staff are the sources outside of Westat: recommendations from NAEP field staff, NAEP State Coordinators (State Coordinators), districts and schools; and advertisements placed on education-related newsletters and web sites and in local newspapers. In the areas where no or limited experienced staff are available, we seek to hire individuals that have worked in or with schools, and/or who are organized and can work well with a variety of people.

2.1 Westat Staff

The Field Recruiting System (FRS) contains the data for most Westat staff (and applicants) that can potentially be hired for NAEP 2005. This includes NAEP experienced staff, education experienced Westat staff that have not worked on NAEP, and education-experienced applicant staff. The names of NAEP-experienced staff and education- experienced Westat staff are provided in the FRS through data obtained from Westat’s Field Files department and last year’s version of the FRS. The Field Files department is responsible for keeping track of all Westat field staff. They maintain documentation on the specific projects that each person has worked on, the number of hours worked on each project, the evaluation given, and a host of additional personnel information.

The primary source of staff for NAEP 2005 is experienced Westat staff that have been successful on previous administrations of NAEP. A Field Staff Availability Form was sent in May to all successful NAEP 2003 and NAEP 2004 AC & AA staff that received an overall evaluation of “1.” This group is our base of qualified experienced NAEP staff. When the form was returned to the home office, the availability status of the person was recorded in the FRS.

Staff with previous NAEP experience in the FRS may not automatically qualify to be an assessment administrator (AA) or an assessment coordinator (AC). You are only authorized to contact fieldworkers who have NAEP 2003 and NAEP 2004 summary evaluation codes of “1.” If you feel a

candidate with an evaluation code of “2” or higher should be considered, you must obtain approval from the field director before contacting him/her.

Another good potential source of staff is Westat experienced staff that have never worked on NAEP. Westat has many other educational studies that recruit staff throughout the year and this staff may be available to work on NAEP. Please note that anyone currently working on another project will have to be cleared through the home office.

The NAEP staff recruiting effort is larger than any other project recruitment at Westat. Staff hired for NAEP are specially trained, so they remain on “reserve” in the Field Files System, but are released for the portions of the year that they are not working on NAEP. Files have been specially generated for the NAEP 2005 staff recruiting using recruitment data for all successful NAEP 2003 and NAEP 2004 field staff.

We have also loaded the names of all staff at Westat (including previous NAEP staff) that have a “Do Not Hire” status. This staff is not eligible to be rehired. This staff can never be hired to work on NAEP. In the FRS, you can search for the person’s name and they will be listed with a “Do Not Hire” or with a “NAEP Do Not Hire” status. See chapter 4 for additional details on this staff.

Please do not contact anyone on the Westat or NAEP “Do Not Hire” lists. If you are contacted by someone on the lists, tell them that we are in the initial stages of NAEP recruiting and that you will take their contact information down and have someone get back to them. Do not discuss their past employment record nor their employment possibilities.

2.2 Westat Application Files

Many applications come into Westat as a result of printed newspaper and magazine advertisements. Other Westat projects that hire also generate many applicants. Often these other projects receive more good applicants than there are positions open. While it has been our experience that applications need to be fresh to be useful, applications for those people with education experience generally have a longer shelf life. We have reviewed all of the applicants in the backup files and pulled the applications for all people with an education background. Copies of these backup applications are sent to the field managers.

Please remember that these materials are strictly confidential and only released to the field temporarily. All printouts, applications, and other recruiting materials with personnel information must be returned to the home office for shredding once recruiting is complete.

The applicant staff information in the FRS will be similar to the experienced Westat staff, except they will not have any previous Westat experience listed. Staff hired from the backup files are treated the same as newly hired staff.

2.3 NAEP Field Staff Recommendations

When we sent out the availability mailer to ACs & AAs in May 2004, we asked for names and addresses of people who they would recommend for NAEP. Many of them provided two or more names. We have also received calls throughout the past year from people who were referred to NAEP. Applications were mailed to the recommended staff. The names and the data of the people who returned the applications are loaded in the FRS and copies of the applications are sent to the field manager. Again, these materials are strictly confidential and only released to the field temporarily. All printouts, applications, and other recruiting materials with personnel information must be returned to the home office for shredding once recruiting is complete.

Some of your professional associates and friends may also be appropriate candidates for NAEP, so please forward any suggestions to Westat. NAEP employees who have previously supervised in a specific area can also provide a wealth of information on experienced and potential field staff. When considering friends or family members as candidates for NAEP, be sure they have the skills and experience necessary for NAEP and note that the hiring of friends and family members must be approved by the field director.

2.4 State, District, and School Recommendations

The NAEP State Service Center has solicited recommendations for NAEP staff from the State Coordinators. Applications were sent to all recommendations. State Coordinators are able to recommend staff recently retired from schools, the state office, scorers on the state assessment, and others.

Recommendations for potential NAEP staff also come from state offices, district offices, and schools. Recently retired and substitute teachers have been excellent employees in past years because of their familiarity with schools and testing. Very often the school coordinator can also recommend a parent who volunteers at the school and works well with the students. However, you should not feel committed to hire anyone just because he/she has been recommended by a superintendent or principal.

Recommendations were sent an application and recruitment flyer. Returned applications are entered in the FRS and provided to you.

2.5 Advertisements in Education-Related Newsletters and Web Sites

NAEP has been advertised in education-related newsletters and on education-related web sites including the Retired Teachers Associations (RTAs) and the Retired Department of Defense Teachers Reunion. We also posted notices in retirement communities. If you know of any additional sources, educational newsletters, and web sites that would be a good vehicle for NAEP recruiting, please contact your field manager. Exhibit 2-1 is the NAEP 2005 Newsletter, Magazine, and Web Site version of the staff recruitment ad.

2.6 Advertisements in Local Newspapers

Westat has experience placing classified ads in most areas of the country. NAEP has placed ads in the major newspapers in the four states that are part of the state oversample: California, Texas, New York, and Florida and in locations where we needed additional qualified staff. Westat contacts the selected newspapers and places the ad. Ads can instruct applicants to call the recruiting supervisor or the home office directly. The responders are screened and interested parties are sent a NAEP Flyer and a Westat Application Form. Instructions for screening applicants can be found in the *Staff Recruiting Magazine* and an example of the screening form is at the end of this appendix. An example ad can be seen in Exhibit 2-2.

Exhibit 2-1. Newsletter, magazine, and web site staff recruitment ad

Assessment Administrators

Temporary Job Opportunities

The National Assessment of Education Progress (NAEP), a congressionally mandated elementary and secondary education research study is looking for people who:

- **Enjoy working in schools**
- **Are detail oriented**
- **Can work in a team**
- **Have good communication skills**
- **Have some education or research experience**

This job features:

- Assignments starting in December 2004 & January 2005
- Local, limited and extensive travel positions available
- Ideal for substitute teachers or retirees
- Competitive rates
- Candidates must complete an FBI background security check

Please call (800) 627-NAEP for more information or send a resume to: NAEP_Recruit@Westat.com or:

WESTAT Attn: Pat Heiser
1650 Research Blvd. GA W18
Rockville, MD 20850-9973.
For more information on Westat, visit www.westat.com.
EOE

WESTAT

Exhibit 2-2. Example of a NAEP classified ad

Assessment Administrators

Temporary Job Opportunities

The National Assessment of Education Progress (NAEP), a congressionally mandated elementary and secondary education research study is looking for people who; **Enjoy working in schools, Are detail oriented, Can work in a team, Have good communication skills, Have some education or research experience.**

This job features Assignments starting in December 2004 & January 2005 and Competitive rates. Candidates must complete an FBI background security check.

Please call **(888) 555-5555** for more information or send a resume to: [Supervisor or FM name@westat.com] or to WESTAT Attn: [Supervisor or FM name] [Supervisor or FM Address] City, State zip-code

For more information on Westat, visit www.westat.com. EOE

WESTAT

2.7 Managing Your Recruiting Sources

All printouts, copies of applications, and other recruiting materials with personnel information are strictly confidential. These materials are only released to the field temporarily. All printouts, applications, and other recruiting materials with personnel information must be returned to the home office for shredding once recruiting is complete. Please feel free to write on them — to jot down notes on the front and back. But, remember that they need to be returned eventually to the home office. You should not keep originals (or make photocopies) of any confidential information (including names, addresses, phone numbers, social security numbers, evaluations, etc.) of field staff. Please do not write on the application except to complete missing information (please initial) and to complete section 13.

Before returning the applications, please be sure they are fully completed and as the recruiter, you should complete Section 13 (found on the last page). If you have any questions about your recruiting sources, please contact your field manager or the NAEP Help Desk at 1(800)627-6237 or NAEPPrecruit@Westat.com.

3. OVERVIEW OF THE NAEP FIELD RECRUITING SYSTEM

3.1 NAEP 2005 Field Recruiting System (FRS)

The NAEP Field Recruiting System (FRS) is designed to provide immediate, up-to-date information on the progress of recruiting, hiring, and training activities for NAEP field staff. The secure, web-based system allows field managers and supervisors access to the same information available to home office staff.

The FRS is intended to help identify and track fieldworkers who worked on previous NAEP studies or other education-related studies, as well as persons new to Westat. It assists the field staff in coordinating and managing the recruiting process by providing the following capabilities:

- Monitor progress toward hiring targets;
- Search for existing records;
- Maintain demographic, field assignment and status information;
- Avoid potential hiring errors;
- Ascertain the correct paperwork for each person;
- Maintain the status of paperwork for each person; and
- Produce various reports.

Any questions about the operation of the FRS should be directed to your field manager or the NAEP Help Desk at 1(800) 499-6237.

Several enhancements were made to the FRS for the NAEP 2005 recruitment:

- Multiple study and position-based field assignments;
- Variable number of lines displayed on the Search screen;
- Verification of county with residential ZIP Code;
- Employment form tracking related to each study/position;

- Enhanced training component;
- Alternate Shipping Address for Pearson and Westat shipments;
- Updates from the Westat Field Files System
- Enhanced data selection (formerly known as mail merge) and standard reports; and
- Many other user friendly upgrades.

3.2 Accessing FRS

All work on the FRS is online, in real-time. You will access the system by connecting to the web site via an Internet browser.

3.2.1 NAEP Laptop Access

If you have not already used your laptop to access the Internet, refer to the document *Windows XP Dial-Up Connection* to learn how. Please note that this document is written for and presents screen shots using the NAEP laptop configuration.

3.2.2 Any PC with Access to the Internet

As the number of options for browser types, connections, and PC configurations is as many as there are computers, detailed instructions are not possible for this alternative. Therefore, you should have some basic understanding of computers other than the NAEP laptop. Essentially, you need to locate the Internet browser on the PC. The browser must be equivalent to or better than Internet Explorer, Version 5 (IE5) to function with the MyNAEP web sites properly. Connect to the Internet using the browser. Enter the address or URL for the MyNAEP web site: www.MyNAEP.com.

This appendix is written for and presents screen shots from the NAEP laptop configuration. Therefore, if you are not using the NAEP laptop, you can expect some differences in the look and use of the FRS.

3.3 NAEP Login

When you are connected, the MyNAEP Welcome screen will appear (this is the default home page on the laptop). Enter your NAEP User Name and password, and click the Login button.

MyNAEP is a restricted use web site that contains information on the National Assessment of Educational Progress (NAEP), widely known as the "Nation's Report Card." This site provides NAEP related information to states, districts, and schools and is designed and maintained by Westat.

[Need to register? Click here to register with MySchool.](#)
Enter your user name and password to enter MyNAEP.

User Name: Password:

[Forgot your Password?](#) | [Disclaimer](#)

For more information, contact the NAEP Help Desk at naephelp@westat.com or call 800-283-6237 (NAEP). The NAEP Help Desk is available Monday through Friday from 8:00 a.m. to 8:00 p.m. (ET).

When the login is successful, the MyNAEP Options screen is displayed. From this screen, you can go to any of the NAEP-related web sites listed on the screen. The list of options that you have access to will depend on your Login. To access the FRS, move the mouse pointer over the words "NAEP Field Recruiting System" and click.

Options	
MySchool	Access information for selected schools
School Control System '05	Record information about sampled schools NAEP 2005
NAEP Field Recruiting System	Field staff recruiting for NAEP 2005

3.4 Logging In Do's and Don'ts

Do enter your password in upper and lowercase letters – exactly as given to you. To login to the system, you will enter your NAEP User Name and password. Please note that the password is a mixture of upper and lowercase letters, as well as numbers and symbols. The NAEP User Name and

password are case sensitive and must match with the information in the Westat system so that it is important that you enter these exactly as they were given to you.

Do keep your NAEP User Name and password secure. Both your NAEP User Name and password have been provided to you. Everyone will have a unique password and NAEP User Name, which must be kept CONFIDENTIAL. Remember that we have pledged to keep the data secure. You must do your part to ensure that no unauthorized persons have access to the NAEP web-based systems.

Do Login. To login, move the mouse pointer over the blank field following “Login:” until the pointer turns into an I-beam and click once to bring the cursor to the field. Type your NAEP User Name exactly as it was given to you. Then, press the Tab-key or move the mouse pointer over the blank field following the label “Password:” and click once to bring the cursor to the field. Type your password exactly as it was given to you. Move the pointer over the Login button and click once or press the Enter-key.

Do be careful entering your password. As you enter your password, all you will see is a series of asterisks (*****) so that no one can see what you are typing. Since you will not be able to see what you are typing, it is important that you are careful as you type the password. After typing the password, press the Enter-key or click the Login button.

Do return to the Login page to correct mistakes in your NAEP User Name and password. If you make a mistake entering either your NAEP User Name or password, you will get the “Sorry” message shown above. If this happens, click on Return to Login Page and carefully type your NAEP User Name and password again.

Do call the NAEP Help Desk after several failed login attempts. The system will allow you to try as many times as you need. However, if you continue to have problems, call the NAEP Help Desk at 1-888-499-6237.

Do request to have your forgotten password emailed to you. If you have forgotten your password, click on Forgot your Password? on the Welcome screen or click on have your password emailed to you on the Sorry screen to go to the Forgot Your Password screen. Type your email address and click the Submit button. Your NAEP User Name and password will be sent to you in an email message.

Don't save your User Name and password in the browser. Your web browser can be programmed so that it will save information and keystrokes for future reference. However, this also means that anyone with access to the computer can use this information as well. If the information stored includes User Names and passwords, then your system and NAEP data will not be secure. Do **not** set the browser to memorize such information. The version of Internet Explorer that is on your NAEP laptop will not save the information.

Don't use Enter-key after entering User Name. Be careful not to press the Enter-key after typing the NAEP User Name. If you do, the system will think that you are trying to login without entering a password, the message below is displayed. If this screen appears, click on [Return to Login Page](#) and retype your NAEP User Name and password.

Invalid User Name or Password

You have entered an **invalid** user name or password. It may have been changed during the transition to MyNAEP. Click here to [have your password emailed to you](#). To re-enter your login information, press the back button. If you continue to experience problems, please contact the NAEP Help Desk Monday-Friday 8:00 a.m. to 8:00 p.m. (ET) at 800-283-6237(NAEP).

[Return to Login Page](#)

[New Users Register here?](#)

3.5 Basics for Using the FRS

Those who have used the School Control System (SCS) will find that the FRS has a similar appearance. The first screen that you see in the FRS is the Staff Search screen.

Staff Search | Region/Area Mgmt | Staffing Targets | Reports | Training | Shipment | Log off

| A | B | C | D | E | E | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

Enter any combination of criteria and then click *Display*

Alternate Name [New Person](#)

Last Name: First Name: City: State:

SSN: WINS: FRS ID:

NN lines per pages: Zip:

TIP The icons and menu items that surround the full screen are related to the functions of the Internet Explorer browser. Removing the Internet Explorer tool and status bars simply by pressing the F11-key on the keyboard can maximize the FRS display. The major navigation icons for Internet Explorer are still available on a smaller toolbar at the top of the screen. Pressing F11 again will restore the tool and status bars. Many users find it easier to work in FRS when the tool bar is removed.

In the upper left corner of the screen is the MyNAEP Home icon as shown here:



Moving the pointer to this icon and clicking will return you to the MyNAEP Options screen that allows you access to the other MyNAEP web sites.

As is common with web-based systems, underlined text indicates a hyperlink. As you move the mouse pointer over a link, the pointer changes shape and the text will change color. Clicking on this text takes you directly (links) to another part of the system. Below the MyNAEP Home icon is a bar listing several hyperlinks. These hyperlinks are available while you are working in the FRS.

[Staff Search](#) | [Region/Area Mgmt](#) | [Staffing Targets](#) | [Reports](#) | [Training](#) | [Shipment](#) | [Log off](#)

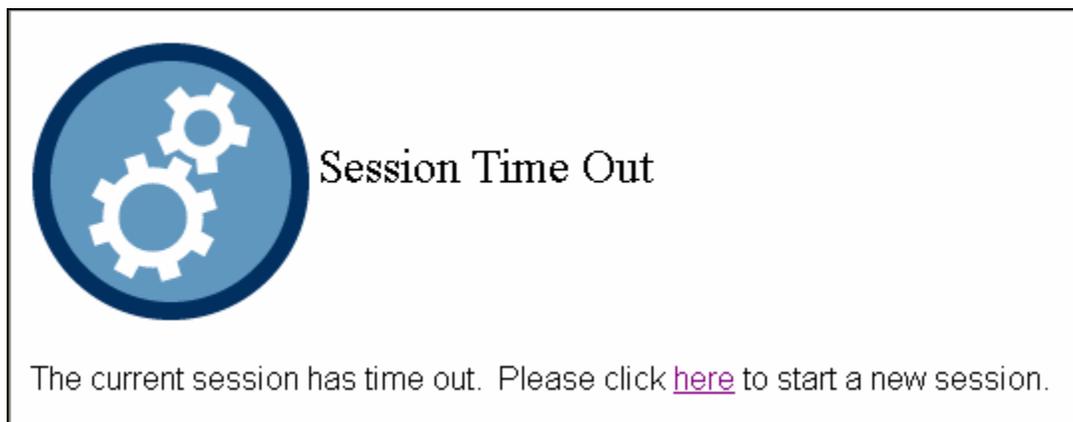
Each of these links is described in more detail in chapter 4 of this appendix, but the following chart presents a brief description.

Link	Description
Staff Search	The first screen you see after entering the FRS. This where you search for existing staff records and creating new ones.
Region/Area Mgmt	View and update supervisor, AC, and AA assignments.
Staffing Targets	View (field managers can update) staffing targets for your territory, region, and area.
Reports	Generate reports for recruiting and staffing activities.
Training	View and update training data for entire training sessions and generate reports.
Shipment	View upcoming shipment dates and enter alternate shipping information.
Log off	Return to MyNAEP Options screen.

The FRS database has more information about each person than can be displayed on one screen. Therefore, the data has been categorized. Once you select a person, you can view their specific information by highlighting or selecting the label or the tab — much like the tab of a file folder. The contents and use of each tab is discussed in more detail in chapter 4 of this appendix.



Please note that if you are logged on to any of the MyNAEP systems and the Westat server does not detect any keyboard or mouse activity for 20 to 30 minutes, the server will log you off. For example, if you are logged into FRS and leave it running while you do something else for 20 to 30 minutes, when you try to return to FRS, a window appears (shown below) explaining that a Session Time Out has occurred and you must login again. Click the word [here](#) to return to the Login screen. This is a security feature so that the database does not remain open for hours at a time and allow for access by someone not authorized to use NAEP.



Most of the data entry or updates are completed on what are known as pop-up windows. These windows are smaller than the main screen and appear (pop up) when you click an **Insert** or **Update** button. Always close the pop-up window by clicking on **Submit** to save your work or **Close** to close the pop-up without saving. While working on a pop-up window, if you click on the screen behind it, the pop-up remains open in the background — you have not finished updating the record. If you leave a pop-up by mistake, simply click on its name in the task bar at the bottom of your screen to re-open it. Then close the pop-up by clicking on **Submit** to save your work or **Close** to close the pop-up without saving.

3.6 Availability and Hiring Status

The Availability Status is the overall status of the person on the project, the interest of the person to work on NAEP and the eligibility to be hired by Westat and/or NAEP. Availability is updated by the home office staff or by the system based on the values of certain fields. The following table lists each Availability Status in FRS, a definition, who or what may change it, how or when it will change, and how the Westat Field Files System (FFS) is affected.

Availability	Definition	Set by	Rules	Field File System (FFS) Affect
Do Not Hire (DNH)	NOT eligible to be hired by Westat.	FFS	Cannot be changed.	None.
NAEP-Do Not Hire	NOT eligible to be hired for NAEP; eligible for other Westat projects.	FRS or HO	Cannot be changed.	None.
Call Home Office (CHO)	May be eligible to be hired after reconciling issue(s).	FFS or HO	Do not contact this person until approval is obtained from Susan Lea or Annette Morgan	None.
Deceased	Person died.	FFS or HO	Cannot be changed.	None. Notify HO
Delete	Duplicate record.	HO or FR or FM	Ensure all data in undeleted record is kept.	None.
Released From Project	Availability is set to this after all NAEP studies/positions have status of Released, Quit, or Fired.	HO or FR or FM	Eligible for rehire.	FFS updated.
Active	Hiring activity has started.	FRS	Study and position activity.	None.
Inactive	Hiring activity has not started, person is eligible, but interest is unknown.	FRS or HO	All staff set to this if not already set to DNH or CHO.	Person on a NAEP reserve or recruitment list in Field Files.

The Hiring Status is the NAEP study/position-specific hiring status and the progression of completion of employment forms. The following table lists each Hiring Status in FRS, a definition, who or what may change it, how or when it will change and how the FFS is affected.

Hiring Status	Definition	Set by	Rules	Field File System (FFS) Affect
Prospect	Potential for hiring on NAEP; may change back to Inactive or proceed to Intend to Hire.	Field or HO	To consider for hiring.	None.
Intend to Hire	Hiring activity to begin. Initial screening done.	Field or HO	Address, county, and position must be entered. Forms to be sent.	FFS updated.
Hired-Key Forms	Application, FWA, and Personnel Form Status = Complete.	FRS	Person can be paid for non-school work.	None.
Hired-All Forms	All employment forms Status = Complete.	FRS	Person can work.	None.
Hired-All Clear	All employment forms Status = Complete; Interview = Complete; References = Approved & FBI Clearance Status = Approved; and Profile Data is non-blank.	FRS	Person cleared to work in schools.	None.
Released	Person is released from this position	Field or HO	Eligible for rehire.	FFS updated.
Quit	Person decides not to work.	Field or HO	Eligible for rehire.	FFS updated.
Fired	Project dismisses person for cause.	Field or HO	Not eligible for rehire.	FFS updated.

Availability Status and Hiring Status together are key fields in controlling interactions with other systems and with the home office. If the record you are entering is a new person, the Hiring Status is automatically set to *Prospect*. For other records, if you want to indicate an initial interest in someone, you can update the Hiring Status to *Prospect*; this will “hold” the person for this assignment until the record is updated to *Intend to Hire* or *Released*. The system will ask for a position for this person at this point, in order to be counted on the Hiring Status report.

You are able to change the position until the Hiring Status becomes Hired-Key Forms. Once the key forms (Application, FWA, and Personnel Form) for a position are marked *Complete*, the person is considered hired by Westat and the person must be *Released* from that position and the End Date must be revised before a new position may be inserted.

3.7 Do Not Hire, NAEP-Do Not Hire, and Call Home Office Records

Any record with a Hiring Status of *Do Not Hire* indicates a person who is not eligible to be hired by Westat. The contact information (address and phone number) is not displayed and no other data is available. Data for this record cannot be updated.

Records with a Hiring Status of *NAEP-Do Not Hire* indicate a person who is not eligible to be hired for work on NAEP because an evaluation on NAEP or other education-related project (e.g., ECLS) was “3.”

Where the Hiring Status is *Call Home Office*, the person has a reconcilable or potentially pardonable issue. You **must** contact Susan Lea at 1-800-627-6237, extension 2015 or email SusanLea@Westat.com; or Annette Morgan at 1-800-627-6237, extension 2609 or email AnnetteMorgan@Westat.com to discuss if contact with this person is appropriate. If the issue can be resolved, Susan or Annette will change the person’s Availability Status to *Available* so that you can proceed with the recruiting process. Some reasons for a *Call Home Office* status are as follows:

- Other Contract – The person is currently working on or reserved for another Westat project.
- Money – The person owes Westat money.
- Rehire – Various issues such as long-term illness.
- Criminal Status – Question on Application about criminal conviction was answered “Yes” or was unanswered.
- Eval = 2 – The person received an Evaluation of “2” – reservations about rehire.

3.8 Exiting the FRS

When you want to exit the FRS, simply click on the Log off link in the top portion of the screen. The MyNAEP Options screen is displayed. If you use the browser's Close or Exit without logging out, some data may be lost or damaged.

4. FIELD RECRUITING SYSTEM GUIDELINES

This section of the Appendix provides guidelines for the following subjects in the Field Recruiting System (FRS):

- Searching for a person;
- Entering data for a person not already in FRS;
- Viewing and updating name, addresses, phone numbers, email addresses, field assignments, employment forms and activities, travel, skills, and profile data, experience, notes, and training;
- Viewing and/or updating region and area assignments;
- Viewing and/or updating targets for staffing the regions and areas;
- Viewing and/or updating training administration data;

The data maintained in the FRS is used in many ways. The accuracy and timeliness of data in the FRS influences:

- Management decisions;
- Shipping of materials;
- Contacts by home office, Help Desk staff, other field staff and state/district/school officials; and
- Reports to the National Center for Education Statistics and other contractors.

It is critical that each person with access to the FRS assumes responsibility for correctly maintaining the data.

4.1 Searching for a Record



Thoroughly searching for a record in the FRS is a key to proper recruiting and hiring for the NAEP project. Not only does the FRS database contain persons who are eligible to be hired, but also the database identifies who is not eligible to be hired. An inadequate search may lead to duplicate records in

the FRS, which would lead to inaccurate reports, hiring conflicts for more than one study, or hiring an ineligible person.

A new feature of the FRS allows you to indicate the number of lines to be displayed on each page of the Search screen. This will allow you to decrease the number of lines displayed so that slower communication connections will refresh the screen more quickly or for faster connections, you may increase the number of lines to scroll down the list of names. Twenty lines per page is the default.

NN lines per pages <input type="text" value="20"/>
--

You can search by last name. Across the top of the Search screen are the letters of the alphabet. Select the first letter of the last name for a list of everyone whose last name begins with that letter.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Alternately, you can search on any combination of the following items:

- Last name – legal or alternate (full last name, or just the first letters);
- First name – legal or alternate (full first name, or just the first letters);
- Social Security Number (numbers only, no dashes or spaces);
- WINS # (numbers only, no dash or space);
- FRS ID;
- City (full city name or just the first letters);
- State;
- ZIP Code (5 digits only, no partial); and/or
- County.

TIP Do not enter quote marks or apostrophes in any data fields.

We recommend that you do not type the entire name (first or last) just in case the name you are searching for is spelled differently than what you may think. For example, if you type “fraser” in the last name field, the only records listed would be for any “Fraser” in the database. Whereas, if you type “fra” in the last name field, the list would include any Fraser, Frasier, Frazer, Frazier, etc., in the database.

The default for searches by name is by legal name only. To search for a record based on the person’s alternate name, click the Alternate Name checkbox. The system searches only for records with that Alternate Name, and displays Alternate Name(s) in the name fields on the Search Results grid.

Do not type dashes when entering a WINS# or Social Security Number. Type numbers only.

To search by county, you must first select the state from the drop-down list; then click the Get County button and select the county from the drop-down list of counties for that state.

The system displays only those records that match **all** of the search criteria, therefore the more criteria you enter the fewer records that will be listed and the more likely it is that you will miss finding the appropriate record. Since the system retains the search criteria when listing the results, you should start with broad or few criteria and narrow the list by typing in additional criteria.

Type in the desired search criteria and click the Display button or press the Enter-key. The bottom section of the screen lists, in alphabetical order, all of the records meeting all of your selection criteria. The list of names is displayed by pages. At the left of the screen, just above the line, the system displays the current page number and the number of pages, and in parentheses just after that, the total number of records selected for the criteria. You can move through the records by clicking on >>Next Page and <<Prev Page, or by selecting a page number from the drop-down list.

If you see a name you want to view or update, click on the underlined name (a hyperlink to the full record). The Address screen for that person will be displayed.

If the record selected is not the one you were looking for and you want to return to the list of names to look for another, click on the browser’s Back Arrow (↶) in the toolbar. If you click on the Staff Search link instead of the Back Arrow, you would return to a blank Search screen ready for a new search.

If you cannot find an FRS record for someone who claims to have previous Westat experience, please contact Annette Morgan at 1-800-627-6237, extension 2609, or email AnnetteMorgan@Westat.com to search in the home office for their data. If no data is available, then a new staff record may be created.

If no records meet the criteria you entered, the system issues a message: “No matching records found.” At this point, you can perform the following:

- Change the criteria you entered and search again; or
- Click on the Staff Search link to empty all of the search criteria boxes and begin again.

If you have exhausted the search scenarios and still have not found the record of the person you seek, then you may create a new record by clicking on the New Person link on the Search screen. *Remember that inadequate searches may lead to duplicate records and/or hiring of ineligible persons.*

TIP If you think the person has worked for Westat previously, but you cannot locate them by searching; enter them as a new person and put their social security number in using the Travel and Skills tab. The nightly FRS update will load any information in the Westat Field Files System based on the social security number.

4.2 Entering New Person Data



If a thorough search on the Staff Search screen found no records or did not find the specific person, you can enter a person’s data by clicking on the New Person link in the upper right corner of the Staff Search screen. The Enter New Staff Name Information pop-up window appears. Use the Tab-key to move between fields. The required fields — legal last name, legal first name, study, position, and state — are marked with a red asterisk (*). A position is required so that this new person can be included in status reports. The position may be changed until the Hiring Status equals Hired-Key Forms.



Enter New Staff Name Information:				
Prefix		Last	First	M
— v	Legal:	<input type="text"/> *	<input type="text"/> *	<input type="text"/>
	Altrnate:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Phone:	<input type="text"/>	WINS: <input type="text"/>	
	SSN:	<input type="text"/>	Source: New Screened Applicant v	
	Project:	<input type="text"/> v *	Position: <input type="text"/> v *	
			Trouble-Shooter: <input type="checkbox"/>	
	Address1:	<input type="text"/>		
	Address2:	<input type="text"/>		
	City:	<input type="text"/>	State: <input type="text"/> v *	Zip: <input type="text"/> *
	<input type="button" value="Get County"/>	<input type="text"/>		
		<input type="button" value="Enter"/>	<input type="button" value="Clear"/>	<input type="button" value="Close"/>
* : required field				

If you have address residential information for the person, you can enter it at this point, but it is not required. You may also want to enter a phone number, if available. Refer to list below for standardization rules for addresses and phone numbers.

Rules for Entering Address and Phone Information

- Use standard abbreviations (e.g., ST, RD, LN, AVE, BLVD, SE, NW, etc.).
- Omit all commas and periods in street addresses.
- Enter apartment numbers on the same line as the street name and number (e.g., 12290 GREEN MEADOW DR #312). Use the number sign (#A) whether the apartment is a numeral or letter.
- Format U.S. phone numbers with hyphens (e.g., 999-999-9999).
- Format non-U.S. phone numbers as: 011 CC TT 999 99999, where 011 is international access code from U.S.; CC is the country code; TT is the city code; 999 99999 is the phone number.

When you are finished entering the information, you can do the following:

- Click on the Enter-key to save your changes and the Addresses and Phones screen is displayed;
- Click on the Clear button to erase the information currently displayed so that you can type in new information; or
- Click on the Close button to return to the screen you came from without saving your changes.

The Hiring Status for the New-Person record defaults to *Prospect*; the status date is set to today's date; and the source defaults to *New*. The system automatically assigns the person an FRS ID number. This number can be used to uniquely identify the person until a WINS# is assigned.

TIP If you get an error message when entering social security number, this person is already in the FRS. Search on social security number to locate the record.

4.3 Viewing/Updating Staff Information



Many of the people you hire will be returning from previous NAEP cycles. The FRS contains a considerable amount of information about these people. You are required to maintain some of this information, as well as collect more information about each person.

In the upper portion of an individual's screen, the Personal Data Sheet button is available so that you may print a Personal Data Sheet (PDS) for that person. Refer to section 5.3.4 for details on the PDS.

Two messages may appear in the upper portion of the screen – “Check Profile Data” and/or “Check Staff Notes.” The Check Profile Data message will appear when any of the profile data fields are blank (refer to section 4.3.5 for details about Profile Data). All profile data must be entered in order for this message to disappear and for the person to be Hired-All Clear. If a Staff Note exists for this person, the Check Staff Notes message will appear. Notes are not necessarily of a negative nature and may pertain

directly to information you need to know. You should make a habit of checking Staff Notes every time you access a record with this message.

The FRS database has more information about each person than can be displayed on one screen. Therefore, basic information about the person is displayed in the upper portion of the screen. This includes:

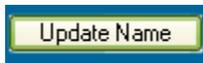
- Legal Name
- WINS#
- FRS Record Number
- Source of Record
- Alternate Name
- Residential State
- Residential County
- Availability

Name	Last	First	M	<input type="button" value="Update Name"/>
Legal:				WINS:
Alternate:				FRS:
State:	County:	Source:		<input type="button" value="Personal Data Sheet"/>
			Availability:	<input type="button" value="Update Availability"/>

All other data about a person is categorized. You can view someone’s specific information by highlighting the label or the tab – much like the tab of a file folder. The contents and use of each tab is discussed in more detail later in this section.



4.3.1 Update Name



The Update Name button will allow you to update the legal and alternate first and last names, middle initial, and prefix. After your initial entry of the legal name for a new person, changes should be made only to the alternate name. All employment forms are official, legal, and binding documents, and a person’s full legal name must be used. The home office staff has procedures to thoroughly check that the legal name in the FRS matches the employment forms and vice versa.

Staff Name Information			
Name	Last	First	M
Legal: <input type="text"/> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Alternate:	<input type="text"/>	<input type="text"/>	<input type="text"/>
WINS: <input type="text"/>	Source: <input type="text" value="New Screened Applicant"/> <input type="button" value="v"/>		FRS:
<input type="button" value="Update"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>			

Suffixes (Jr., III, etc.) must be entered in the last name field of the legal name. To maintain consistency with other systems and so that names will be printed properly on reports and labels, do not insert any punctuation except for hyphens. For example, John R. Jones, Jr. and Jane C. Heiser-Morgan would be typed in as follows:

<i>Last</i>	<i>First</i>	<i>M</i>
JONES JR	JOHN	R
HEISER-MORGAN	JANE	C

Also, to maintain consistency with other systems and reports, the FRS translates name data to all upper case. So you may enter upper and lowercase, but it will convert to all upper case.



4.3.2 Addresses and Telephones

Most address and phone information is from the previous NAEP cycle or was transferred from the Field Files System (FFS). Other staff have entered some information. The system requires at least one line of street address, city, state, and ZIP Code.

The residential address is the legal, physical address of the person. Post office boxes are not to be used in the residential address field. Westat and Pearson use this address for express delivery service (FedEx, UPS) shipments, which require a residential street address.

Update a Residential Address Information	
Address1:	<input type="text"/> <input type="checkbox"/> Bad Address
Address2:	<input type="text"/>
City:	<input type="text"/> State: <input type="button" value="v"/> Zip: <input type="text"/>
<input type="button" value="Get County"/>	<input type="text"/>
<input type="button" value="Update"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>	

The county is associated with the residential address and is used to determine a person's pay rate. Whenever the residential address changes, you must update the county. County does not automatically update when the address changes. You will get an error message if the ZIP Code does not match the county. For field staff other than field managers and supervisors (whose pay rates are not visible in FRS), the pay rate on the Field Assignment screen may change because of the change in county. The home office **must** be notified when changes to an address occur (send an email to NAEP-Recruit@Westat.com).

If there is an address that differs from the residential address and is preferred for mailing general correspondence, you should enter that mailing address. Post office boxes are to be maintained in the mailing address. You can also store a temporary address, with start date and end date, for fieldworkers who may be traveling. This temporary address will then be used as the person's mailing address if labels are printed during the dates listed.

Telephone numbers include a primary and secondary telephone, as well as a cell phone and a number for a fax. There is automatic formatting of telephone numbers, so just enter the numbers with out dashes or periods.

The NAEP email address is one assigned by Westat. The other email address may be a personal or alternate email. When you enter an email address, it is transformed into a link. Click on the link to open email and send a message to the person.

Staff Phone Information	
Primary Phone:	<input type="text"/> <input type="checkbox"/> Bad Phone
Secondary Phone:	<input type="text"/> <input type="checkbox"/> Bad Phone
Fax:	<input type="text"/> <input type="checkbox"/> Bad Fax
Cell:	<input type="text"/> <input type="checkbox"/> Bad Cell
Email:	<input type="text"/> <input type="checkbox"/> Bad Email
NAEP Email:	<input type="text"/>
<input type="button" value="Insert"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>	

If the address, phone, or email information displayed is incorrect, but new information is not available to replace it, you may check or click the Bad Address, Phone, Fax, Cell, or Email indicators. The entire field is displayed in red and a red asterisk (*) appears next to an address or phone. If you have more current information, please update the information and uncheck the bad information box.



4.3.3 Field Assignment

The Field Assignment tab allows you to view multiple field assignments for a person.

Project:	NAEP-2005		
Position:	AA		
Status:	Prospect		
Start date:			
End Date:			
Pay Rate:			
Territory/FM:	<input type="checkbox"/>		
Region/SV:	<input type="checkbox"/>		
Area/AC:	<input type="checkbox"/>		
<input type="button" value="Update"/>		<input type="button" value="Insert"/>	

To change the Hiring Status of a person to indicate your interest in hiring them, you may click the Update button if the assignment is already displayed or you may click the Insert button to add a new assignment.

When the Update button is chosen, a pop-up window appears with a drop-down list for you to select Prospect or Intend to Hire.

Update Staff Hire Status	
Name: ., .	
Project: NAEP-2005	
Current Status: Prospect	
Select one: Prospect	▼
<input type="button" value="Update"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>	

When the Insert button is chosen, a pop-up window appears with drop-down lists for you to select the project and status of Prospect or Intend to Hire.

Update Staff Hire Status	
Name: ., .	
Project:(required) Please select one	▼
Current Status: Inactive	
Select one: _____	▼
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>	

After selecting the Hiring Status, click the Update or Submit button. A pop-up window will appear asking if you wish to update the Hiring Status. If you do, click the OK button. Another window appears for you to review address and update the field assignment data. Check that the address is correct. Select the appropriate position from the drop-down list. Start and end dates will change to the default dates for that position. Adjust the dates if the person is starting earlier or later or is expected to stop work sooner or continue working longer than the default dates. For assessment administrators (AAs), select the appropriate region and area (if available) where this person is assigned to work. When required fields are

complete and all data looks to be correct, click the Submit button to save the data. The Field Assignment tab should now display the new field assignment information.

Update a Residential Address Information			
Address1: *	<input type="text"/>	<input type="checkbox"/> Bad Address	
Address2:	<input type="text"/>		
City: *	<input type="text"/>	State: * MD <input type="button" value="v"/>	Zip: * 20850
<input type="button" value="Get County"/> *	<input type="text"/>		
Update Field Assignment Information for Project NAEP-2005			
Position: AA *	Start Date: *	End Date: *	Pay Rate:
<input type="button" value="Change Position"/>	2005 <input type="button" value="v"/> Jan <input type="button" value="v"/> 1 <input type="button" value="v"/>	2005 <input type="button" value="v"/> Mar <input type="button" value="v"/> 16 <input type="button" value="v"/>	\$ <input type="text"/>
Territory - Region - Area *	FM	Sup	AC
<input type="button" value="v"/>			
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>			
* : required field			



4.3.4 Forms and Activities

The Forms and Activities tab is divided into three sections;

- Study/position-specific employment forms;
- General employment forms; and
- Employment activities.

The Forms and Activities screen displays all of the forms and activities necessary in the hiring process. Most forms begin with a blank status. If a record is loaded or updated from the FFS, the Application; I-9; Fingerprint Form; Release Form; and FBI Clearance may have a status of *Complete*, *Incomplete*, *On File*, or *Approved*, as appropriate.

The study/position-related forms are the Fieldworker Agreement (FWA), the Personnel Form, and the Evaluation. For each study and/or position, another set of these forms is required and a column is displayed for each study/position.

Project:	NAEP-2005	
Position:	AA	
Personnel Form:	
Status Date:		
Field Worker Form:	
Status Date:		
Evaluation:	
Start Date:		
<input type="button" value="Update"/>		

Form Type	Status	Status Date
Westat Application	Distribute	5/17/2004
Form I9		
I9 Documents		
Federal Tax Form (W4)		
State Tax Form		
Direct Deposit Form		
Fingerprint Form		
Release Form		
Nondisclosure Form		
Oath of Office		
Equipment Receipt Form		
Availability Mailer		

Activity Type	Status	Status Date
Interview		
Reference Check 1		
Reference Check 2		
Reference Check 3		
FBI Check		

For New Hires, the Status column is blank for all of the forms except the Westat Application, which has a status of *Distribute*. You should click the Given to Candidate button to update the status of the application to *Given to Candidate* and give or mail the application to the candidate.

When the Hiring Status is changed to *Intend to Hire*, any of the required forms not already *Complete* or *On File* will be changed to a status of *Distribute*, meaning that you need to distribute those forms to the person. Make a packet of employment forms where status is *Distribute*, and send them to the applicant/candidate with the return envelope addressed to the home office. Update the status of those forms by clicking the Given to Candidate button.

When the home office receives any of the forms, we have procedures to determine if each form is *Complete* or *Incomplete* and the form's status in FRS is marked accordingly. There are some forms that are not required or may not be required under certain circumstances. In these cases, a status of *Not Applicable* is selected (e.g., the Direct Deposit Form is optional).

For persons with a source of *New* you must have an in-person interview and check their references before the person can be hired. As you complete the interview and reference checks, you need to enter those activities on the Forms and Activities tab. Click on the appropriate underlined activity and on the pop-up window, select the appropriate status from the drop-down list. Click the Submit button to save your entry and return to the Forms and Activities tab.

One additional note: no one can work in a school until they have submitted their fingerprints for the FBI clearance process. This includes the submission of the original set of finger prints or the resubmission of fingerprints. Resubmission is necessary for when the original clearance has expired (after 3 years) or the originally submitted prints were unreadable.



4.3.5 Travel, Skills, and Profile Data

The Travel Preference screen is presented to help you select persons suitable for the specific tasks based on the travel involved. If the Field Files System (FFS) has information about a person’s travel preferences, that information is displayed on this screen. Travel Preference may be updated by field or home office staff. There is also space for a 50 character free-form text note pertaining to travel. In addition to travel, there is a field for DoDDS Experience. To add or update any fields on this screen, click on the field or the drop-down arrow next to the field; enter the data or highlight the value on the drop-down list; and click the Add or Update button.

Travel Preference:	Unknown	Date:					
Travel Comments:							
DoDDS Experience:	Date:	<input type="button" value="Update"/>				
Skills	Fluency	Status Date	<input type="button" value="Add"/>				
.....						
Job Experience	Education Level	ED Related?	Education Years	Gender	Date of Birth	SSN	<input type="button" value="Update"/>
.....	<input type="checkbox"/>		7654	

This screen also displays any special skills or languages which the person may possess, their proficiency (Fluent, Not fluent), and how the proficiency was assessed. As with travel, language is presented to help you select persons suitable for specific tasks. Skills would include the following:

- Languages (e.g., Spanish, French, etc.);
- Sign Language; and/or
- Special Learning.

A *Not Fluent* listing for English means that during the certification process, it was determined that the person was not fluent in English. This entry is usually paired with a listing for fluency in another language.

The FFS also updates language data. Other skills can be added by home office or field staff. To add or update any fields on this screen, you click on the field or the drop-down arrow next to the field; enter the data or highlight the value on the drop-down list; and click the Add or Update button.

New to the FRS is Profile Data. Profile Data is used for the analysis of field staff experience as requested by NCES. All Profile Data must be complete for Hiring Status to be Hired-All Clear. A message in the upper portion of the screen appears (Check Profile Data) when any of the fields are blank. To add or update any fields on this screen, you click on the field or the drop-down arrow next to the field; enter the data or highlight the value on the drop-down list; and click the Add or Update button. Gender and Date of Birth are updated by home office staff only. The year in Date of Birth is masked for privacy. Social Security Number may be entered by field staff if it is blank, but once the field is entered, only home office staff may update Social Security Number.

4.3.6 Westat Experience



The Westat Experience screen displays information that was transferred from the FFS about a person's previous Westat work and any projects that have the person on a Reserved or Recruitment List. It lists all the Reserved or Recruitment Lists and then in reverse chronological order, their previous

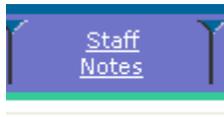
positions at Westat, including the project, position, supervisor, start and end dates, evaluation, and evaluation comment (all evaluation data is omitted for anyone who held a position of supervisor).

Westat Experience						
Project	Position	Supervisor	Start Date	End Date	Eval	Evaluation Comment
NAEP-2004	Reserve List		5/19/2004	5/20/2004		On Reserve
NAEP-2003	Assessor	NAEP	1/1/2003	3/7/2003	1	ACCURATE. EARLY.

Two notes about the Westat Experience screen:

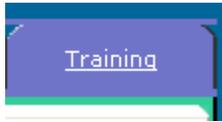
- If the evaluation comment begins with the notation “NWORK,” it means that the fieldworker never actually worked in the position.
- If the position is “Others,” the exact name of the position should be displayed at the beginning of the Evaluation Comment field.

There is no user-modifiable information on the Westat Experience screen (a.k.a., it is a read-only screen).



4.3.7 Staff Notes

The Staff Notes screen is a free-form text area used to enter notes about the person. Home office and field staff may enter notes. All users may view the notes. The notes are printed on the PDS (refer to section 5.3.4 for details). The system automatically indicates the date and time the note was added and the name of the user who created the note. Notes cannot be deleted. To add a note, click on the Add button; enter the note; and click the Add button. If a note exists for this person, the Check Staff Notes message will appear in the upper portion of the person’s screens. Notes are not necessarily of a negative nature and may pertain directly to information needed by field or home office staff. You should make a habit of checking Staff Notes every time you access a record with this message.



4.3.8 Training

The Training screen allows you to view and update information about the training of the specific person. The data includes Training Status, Date, Location, Role, Home Study, and Travel Plans. Each training is based on study, position, and hiring status. The date and location may be updated for each person individually or can be updated via the Training Link (refer to section 4.6).

Project:	NAEP-2005		
Session:	AC Train		
Status:	To be scheduled		
Date(s):			
Place:			
Room:			
Role:	Trainee		
Position:			
Travel Plan:			
Home Study:			
	<input type="button" value="Update"/>	<input type="button" value="Insert"/>	

Travel Plans for training are tracked on this tab. Statuses include the following:

- To be scheduled;
- In progress: travel office is working on travel arrangements; or
- Complete: travel plans are final.

The Training tab also tracks the status of the Home Study. When the Home Study Package is shipped, Home Study Status will be changed to Given to Trainee, and the home office will set the default date when the Home Study Exercise is due. The field manager/supervisor may indicate one of the following statuses:

- Complete/Certified: trainee has completed the Home Study to the satisfaction of the field manager/supervisor. No further action is required.

- Incomplete: trainee has been granted additional time to finish Home Study; new Due Date is set.
- Unsatisfactory: trainee needs additional study; trainee cannot attend training; Training Status is set to Holding; new Due Date is set.
- Released: changed by system when corresponding study/position Hiring Status changed to Released, Fired, Quit, or Deceased.

In addition to the trainee role, field staff may be assigned other roles for training: trainer, observer, and assistant. For example, a supervisor may be a trainer at an AC training session. In this case, the supervisor’s record would be located; the Training tab clicked; and a training record inserted for the correct training type, session, location, and role of trainer.

4.4 Region/Area Management Link



This link is study specific. Based on the current/active position, this link displays the following for each study: field manager responsible for the territory; each region number (table of regions created in SCS); and the supervisor assigned to each region.

Select Project:			
NAEP-2004/LTT		NAEP-2004/FLANG	
NAEP-2005			
Assign Supervisors to Regions for Project NAEP-2005			
FM Manager	Region	Supervisor	
Field Manager1	Region 1		<input type="button" value="Update"/>
Field Manager1	Region 2		<input type="button" value="Update"/>
Field Manager1	Region 3	Super Visor1	<input type="button" value="Update"/>
Field Manager1	Region 4		<input type="button" value="Update"/>

The functions within the Region/Area Management link are as follows:

- Home office and field managers can utilize the Update button next to a region/supervisor, so that the current supervisor may be unassigned (leaving the region without a supervisor) or assigned to another supervisor from a drop-down list of supervisor names (current/active position must be supervisor or supervisor-troubleshooter (SV-TS) in order to appear on the list);

Update Region/Area Information	
Assigned Supervisor Name:	<input type="button" value="Unassign"/>
Territory: 1	Region: 1
New Supervisor:	<input type="text" value="Not assigned"/> ▾
<input type="button" value="Update"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>	

- By clicking the region, all assessment coordinators (ACs) assigned to that region are displayed along with their corresponding Area designation;

Select Project:				
<input type="button" value="NAEP-2004/LTT"/>		<input type="button" value="NAEP-2004/FLANG"/>		<input type="button" value="NAEP-2005"/>
Territory	Region	Area	Area Coordinator	
Territory 1	Region 2	Area 1		<input type="button" value="Update"/>
Territory 1	Region 2	Area 2		<input type="button" value="Update"/>
<input type="button" value="Close"/>				

- By clicking the Update button next to an area/AC, the current AC may be unassigned (leaving the area without an AC) or re-assigned to another AC from a drop-down list of AC names (current/active position must be AC or assessment coordinator-troubleshooter (AC-TS) in order to appear on the list); and

Update Region/Area Information	
Assigned Area Coordinator Name:	<input type="button" value="Unassign"/>
Territory: 1	Region: 2 Area: 1
New Assessment Coordinator:	<input type="text" value="Not assigned"/> ▾
<input type="button" value="Update"/> <input type="button" value="Reset"/> <input type="button" value="Close"/>	

Note: ACs and supervisors are assigned to regions and areas on this link only. AAs are assigned in the Field Assignment tab only.

4.5 Staffing Targets Link



Westat home office will divide the nation into territories. Each territory is assigned to a field manager. As school/sampling data becomes available, field directors and field managers will subdivide their territories into regions and subsequently areas will subdivide the regions (regions and areas are created in SCS). Within territories, regions, and areas, targets will be established for each position to be hired. Targets for each territory, region, and area are listed in the Hiring Status Report.

Select Project: * Total is not equal to sum of the parts.

Staff Recruiting Targets for Project NAEP-2005						
Test FieldRecruiter1 (FR)						
Field Manager Name	Supervisor Name	Region	Area	Supervisors	Assessment Coordinator	Assessment Administrator
Field Manager1	N/A			11	*8	20
Field Manager1	Not Assign	1		5	*10	12
Field Manager1	Not Assign	1	1	2	2	6
Field Manager1	Not Assign	1	2	1	1	5
Field Manager1	Not Assign	1	3	2	-	1
Field Manager1	Not Assign	2		6	5	8
Field Manager1	Not Assign	2	1	-	-	5
Field Manager1	Not Assign	2	2	-	-	3
Field Manager1	Super Visor1	3		-	-	-
Field Manager1	Super Visor1	3	1	-	-	-
Field Manager1	Super Visor1	3	2	-	-	-

Field managers can enter and review the targets by clicking on the Staffing Targets link. To change a target for a particular territory and position, click in the appropriate cell and enter the new figure. Click on Update to save your changes. Numbers in red and marked with an asterisk (*) indicate that the sum of the parts does not equal the whole. You need to reconsider the lower-level numbers so that they add up to the higher-level numbers (e.g., targets for areas within a region must add up to the total for that region).

4.6 Training Link



The training link provides for the overall management of the training sessions. There are three major functions of this link: collective view and update of training sessions, training administration,

and training reports. A training record is created based on the hiring status and position of the person. The training link allows you to collectively select and update the trainees' training statuses, assign trainees to locations and rooms, view and update Home Study statuses, and view and update Travel Plans statuses.

Training administration consists of viewing the administrative portions of each training session. This includes verifying field staff assigned as trainers, observers and assistants (refer to section 4.3.8 for assignment of field staff); assignment of home office trainers, assistants, equipment operators, and runners (free-form text entry). Only home office staff should update the home office training roles.

There are two training reports — the Training Status Report and the Training Room Report. The status report allows field and home office staff to track the progression of training status, home study status, and travel plans as well as track the administrative needs of each training session. The room report may be used as a sign-in sheet, an attendance sheet, a list posted on the door of the training room, etc.

4.7 Alternate Shipping Address



The alternate shipping link has been added to indicate where Pearson and Westat shipments should be sent for each area. Each shipment is loaded into the system by the HO, a cut off date is assigned and the residential address is loaded as the default address. The Supervisor or AC can designate an alternate address by selecting update and entering the alternate shipping address. A different address may be designated for each shipment. On the date of the deadline the option to update will no longer be available.

The screenshot shows a web browser window titled "Shipment Address Information - Microsoft Internet Explorer". The main content area displays a form titled "Update Shipment Address" with a blue header. The form contains the following fields and controls:

- Shipment Address Type:** A dropdown menu set to "A".
- Address1:** A text input field containing "8007 STEVE DRIVE".
- Address2:** A text input field containing "Test address 2".
- City:** A text input field containing "FORESTVILLE".
- State:** A dropdown menu set to "MD".
- Zip:** A text input field containing "20747".
- Phone:** A text input field containing "3013508114".
- At the bottom of the form are two buttons: "Update" and "Close".

4.8 The Future of FRS

The FRS is still evolving. We have plans to add a batch entry link that will allow data to be entered in batches and the ability to complete staff evaluations through the FRS. We will send you updates as these features are added. Your suggestions for enhancements are welcome.

5. FIELD RECRUITING SYSTEM — REPORTS

5.1 Creating, Viewing, and Printing Reports

The Field Recruiting System (FRS) has two reporting features: a data selection feature to view and/or export data (formerly known as mail merge), and preformatted, standard reports for viewing and printing. Either feature is accessible from the Reports Menu by clicking on the [Reports](#) link at the top of the NAEP FRS screen.

Reports Menu

[FRS Data Selection](#)

[Hiring Status Report](#)

[Personnel Forms & Activities Report](#)

[Do Not Hire Report](#)

[Personal Data Sheets](#)

[Region/Area Cross-Reference Report](#)

[Gaining Cooperation Supervisor Listing](#)

[State Prospect Listing](#)

5.2 FRS Data Selection

5.2.1 Overview

This option, formerly known as mail merge, was originally developed to provide NAEP State Coordinators (State Coordinators) with a means of generating mailing labels and customized letters. Through this option, an electronic file is created that can be used with another application, such as a word processor, to generate individualized letters, mailing labels, etc. It can also be used with Excel to generate specialized reports. It is this latter use that you may find of great benefit to you.

Using this feature, you will follow four relatively simple steps as you:

- Select the fields that you want to use;
- Indicate how you want the data sorted;
- Indicate which of the records you want included (sub setting or filtering); and then
- View the results and create an electronic file of the data to be printed.

5.2.2 Creating a List of Staff

This section will guide you step by step in producing a report that is not available from the list of preformatted, standard reports. In this example, we will walk you through the process of creating a report that recruiting supervisors and field managers will want to produce rather frequently. This report will list all of the candidates that you may wish to hire in a particular geographical locale.

From the report menu options, select FRS Data Selection. Carefully review the list of fields on the first Data Selection screen. There are some new fields, some changes to fields, and other fields have been removed.

Step 1. Select Fields

Steps: 1. Select Fields | 2. Sort Fields | 3. Subset/Filter | 4. Preview/Export

Select the fields you want to be included in your custom letters/labels/reports. [Reset](#) | [Next >>](#)

Staff/Profile Information	Address Information	Assignment Information
<input type="checkbox"/> FRS ID	<input type="checkbox"/> Residence Address	<input type="checkbox"/> Study
<input type="checkbox"/> WINS	<input type="checkbox"/> Reside Address 1	<input type="checkbox"/> Position
<input type="checkbox"/> First Name	<input type="checkbox"/> Reside Address 2	<input type="checkbox"/> Hire Status
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Reside City	<input type="checkbox"/> Hire Status Date
<input type="checkbox"/> Last Name	<input type="checkbox"/> Reside State	<input type="checkbox"/> Start Date
<input type="checkbox"/> Alt Last Name	<input type="checkbox"/> Reside Zip	<input type="checkbox"/> End Date
<input type="checkbox"/> Alt First Name	<input type="checkbox"/> Reside County	<input type="checkbox"/> Territory
<input type="checkbox"/> Alt Middle Name	<input type="checkbox"/> Phone 1	<input type="checkbox"/> Region
<input type="checkbox"/> SSN	<input type="checkbox"/> Phone 2	<input type="checkbox"/> Area
<input type="checkbox"/> Gender	<input type="checkbox"/> FAX	<input type="checkbox"/> TroubleYN
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Cell	<input type="checkbox"/> Field Manager
<input type="checkbox"/> Highest Education/Degree	<input type="checkbox"/> Email Westat	<input type="checkbox"/> Supervisor
<input type="checkbox"/> Education-related Degree	<input type="checkbox"/> Email Other	<input type="checkbox"/> Assessment Coordinator
<input type="checkbox"/> Highest Education Job		
<input type="checkbox"/> Number of Years in Education	<input type="checkbox"/> Mail Address	
<input type="checkbox"/> Source	<input type="checkbox"/> Mail Address 1	
<input type="checkbox"/> Hire Availability	<input type="checkbox"/> Mail Address 2	
	<input type="checkbox"/> Mail City	

As it states at the top of this screen, in Step 1 you will select the fields to be included in your report. To select a field click on the name of the field or in the small box in front of it.

For this report, select the following fields:

- WINS;
- First Name;
- Last Name;
- Reside Address 1;
- Reside Address 2;
- Reside City;
- Reside State;
- Reside Zip;
- Phone 1;
- Phone 2; and
- Hire Status.

The order in which you select these fields does not matter. You will set the sort order in the next step. Next, click on the second tab and go to Step 2 in Data Selection.

Step 2. Sort Fields

Steps:	1. Select Fields	2. Sort Fields	3. Subset/Filter	4. Preview/Export	My Mail Merges
Select the field(s) by which the information will be sorted.					
Fields:		Sort Direction:	Sort Order:		
WINS First Name Last Name Reside Address 1 Reside Address 2 Reside City Reside State Reside Zip Phone 1 Phone 2		<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	Last Name Asc First Name Asc		

How do you want the report or list of candidates sorted? We will sort the report by last name.

First, put the focus of the computer on the sort field by clicking on Last Name in the list under “Fields” (on the left of the screen). Next, click on the button with the right arrow (>) to indicate that you want to “send” that field into the box labeled “Sort Order” (on the right of the screen).

Let’s select First Name as our second sort order. Below, the selections that we have made are displayed in the “Sort Order” column.

If you make a mistake, or change your mind after copying a field from the list of fields to the “Sort Order” list, click on the field name in the “Sort Order” list and click on the left (<) arrow to remove it from the “Sort Order” list.

When finished with your selections here, go to Data Selection Step 3.

Step 3. Subset/Filter

Subset Fields:	Operators	Fields Values:
WINS	<input checked="" type="radio"/> =	NEW STRAITSVILLE
First Name	<input type="radio"/> >	NEW TAZEWELL
Last Name	<input type="radio"/> > =	NEW YORK
Reside Address 1	<input type="radio"/> <	NEW YORK CITY
Reside Address 2	<input type="radio"/> < =	NEWARK
Reside City	<input type="radio"/> < >	NEWBERRY
Reside State	Multiple Conditions	
Reside Zip	<input type="radio"/> AND	NEWBRUNSWICK
Phone 1	<input checked="" type="radio"/> OR	NEWBURG
Phone 2		NEWBURGH
Hire Status		NEWBURY PARK
		NEWBURYPORT
		NEWINGTON
		NEWNAN

In this step, you will tell the system that you want a report for only one city. You can come back and create a report for another area after producing the first list.

As this step indicates, you will “subset” or filter the data so that the candidates in only one city will be displayed.

First, select the field “City” (click on it). In the Field Values panel all of the cities will be displayed.

What you have created at this point is a statement or condition: you want the list to be comprised only of candidates for which city equals “New York City.” You didn’t need to select “equals” since that is the default option. The other symbols are explained here if you are not familiar with them.

Now, you need to complete the process by adding the statement or condition to the “Complete Subset” box. You do this by clicking on the **Add Condition** button. In the panel below that button you will see the full statement or condition that you have created.

Subset Fields:	Operators	Fields Values:
WINS	<input checked="" type="radio"/> =	NEW STRAITSVILLE
First Name	<input type="radio"/> >	NEW TAZEWELL
Last Name	<input type="radio"/> > =	NEW YORK
Reside Address 1	<input type="radio"/> <	NEW YORK CITY
Reside Address 2	<input type="radio"/> < =	NEWARK
Reside City	<input type="radio"/> < >	NEWBERRY
Reside State	Multiple Conditions	
Reside Zip	<input type="radio"/> AND	NEWBRUNSWICK
Phone 1	<input checked="" type="radio"/> OR	NEWBURG
Phone 2		NEWBURGH
Hire Status		NEWBURY PARK
		NEWBURYPORT
		NEWINGTON
		NEWNAN

Complete Subset:

(Reside City = 'NEW YORK CITY')

Adding the Condition to the Subset

Note: Data Selection is a simple reporting tool and complex subsets may not give the anticipated results. You should limit your subset/filtering to two or three conditions. You can always export the report and subset by additional variables.

Step 4. Preview/Export

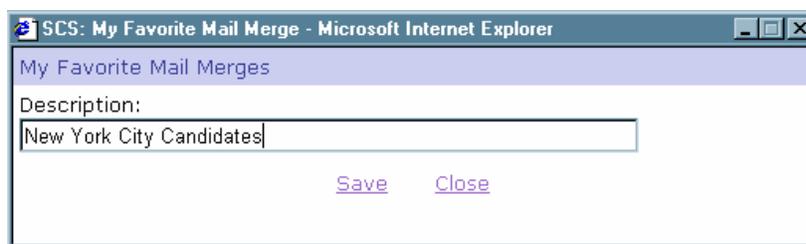
Now we are ready to see the list, so go to Step 4. Here, you can see the results of your efforts in the proceeding steps before you actually create the electronic file. If you need to modify something, you can go back to Step 3 or Step 2.

Last Name	First Name	Reside City	Reside State	Phone 1
ARGA	LU	NEW YORK CITY	NY	212-427-t

Preview of Report – Step 4

If your report looks correct, select the “Save Data Selection” option at the top of the screen. This will allow you to save the report format in the “My Data Selections” tab so that you can very quickly recreate the report for this city any time you want to run it again on up-to-date data.

When you click on Save Data Selection, a small dialog box will open giving you the opportunity to name your report. Enter the name and click on “Save.”



Naming and Saving Custom Data Selection

You should print out this report before going any further. Click on the print icon at the top of the screen (being sure that your printer is connected and turned on).

Web sites unfortunately do not always print out very well. It is quite possible that, at a page break, part of a line will print at the bottom of one piece of paper and part of it on the top of the next page. An option would be to save or “export” the report to an Excel file and print it from Excel.

Now that you have saved this report as one of your data selections, you can access it any time you need to by clicking on the My Data Selection tab. Below is an example of how the listing will be displayed.

Steps:	1. Select Fields	2. Sort Fields	3. Subset/Filter	4. Preview/Export	My Mail Merges (1)
My Favorite Mail Merge List					
Name/Description			Details		
Load	Delete	1. New York City Candidates <small>8/19/2003 5:31:49 PM</small>	Columns: First Name, Last Name, Reside City, Reside State, Phone 1, Hire Status		

My Data Selections

Select Load to get a report showing you the report with up-to-the-moment data.

5.2.3 Creating a List for Another City

If you want to create a status report for another city, you can easily do so. Go back to Step 1 of the Data Selection process by clicking on the tab labeled Step 1 Select Fields. As you will see, the fields that you originally selected will still be selected. Go through the steps until you get to Step 3 so that you can select a different city for your next report.

In Step 3, you will need to remove the condition City = New York City so that you can create a new condition of City = Albany. To do this, highlight the condition you created for the first report and then click on the **Remove Condition** button.

Then, return to the top part of the screen and create the condition City = Albany and click on the **Add Condition** button.

Then, in Step 4, if the report looks right, you can save it in My Data Selections. This time, we saved it as “Albany Candidates.” Click on the tab labeled My Data Selections.

5.2.4 Explanation of Data Selection Symbols

If you are not familiar with the symbols used in Step 3, they are explained below.

- = Equals (the default)
- > Greater than
- >= Greater than or equal to
- < Less than
- <= Less than or equal to
- <> Does not equal

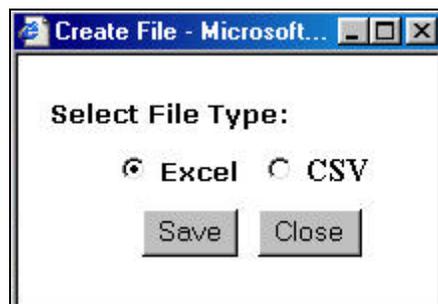
If you are familiar with these mathematical symbols, you are also aware that they are not displayed completely accurately within the FRS. However, it is not always possible to use the actual mathematical symbols when designing screens such as these.

Note: Data Selection is a simple reporting tool and complex subsets may not give the anticipated results. You should limit your subset/filtering to two or three conditions.

5.2.5 Export Data

After you have created a report with Data Selection, you can save the entire report in an Excel file. While the option discussed in Step 4 saves the format (“condition”), this option saves the actual data that you have put in a report.

With the report displayed in Step 4 of the Data Selection steps, click on the Export Data link at the top of the screen. A small dialog box will appear asking if you want to save an Excel or CSV file.



Excel is the default. The file type CSV (Comma Separated Values) is a format that can be used by a wide variety of applications. Saving the file in Excel will make it immediately available to you.

5.3 Standard Reports

Links to each of the preformatted, standard reports is listed on the Reports Menu. Click on the hyperlink for the report you wish to create. This section will review report basics then give a description of each report.

Reports Menu

[FRS Data Selection](#)

[Hiring Status Report](#)

[Personnel Forms & Activities Report](#)

[Do Not Hire Report](#)

[Personal Data Sheets](#)

[Region/Area Cross-Reference Report](#)

[Gaining Cooperation Supervisor Listing](#)

[State Prospect Listing](#)

The first time you run a report, you will be prompted to download a small file required to generate reports. Click on Yes to download the file.

The main window for the report opens. Enter your selection criteria; the system searches for records that meet all of the criteria entered. Select the sort order from the drop-down list. For all of the reports that can be sorted by Name, if additional sort criteria are selected, the list is sorted by Name within the primary sort criteria.

Click on **Run Report** to view your report. The report viewer opens.

Use the scroll bar to scroll down the page. Use the back arrow in the Internet Explorer toolbar (↶) to close the report and go back to the main report page.



Use the buttons at the top of the window for the following functions:

Icon	Purpose and Use
	Print a copy of the report. Opens the printer dialog box.
	Export the report to a Word or Excel document. You will be asked to confirm the export, and then select a format and directory and filename for the saved report.
	Refresh the image of the report.
	Change the magnification of the view of the report on the screen. The smaller the magnification, the more information fits on the screen. Select Whole Page to view a complete page on the screen. Select Page Width to fit the report to the width of your screen.
	Go to the beginning of the report.
	Go back one page.
	Displays the current page number. You can enter a new page to go directly to that page.
	Go forward one page.
	Go to the end of the report.
	Find a word or phrase.

5.3.1 Hiring Status Report

The Hiring Status Report can be run to show either territory-level counts; territory- and region-level counts; or territory-, region-, and area-level counts.

Hiring Status Report

Select Project: NAEP 2005 ▼

Please select the Area type for which you would like to see the result:

Field Manager
 Field Manager and Region
 Field Manager, Region, and Area

Run Report
Reset

The Hiring Status Report has a separate page for each staff position (AA, AC, SV & HC). The Hiring Status Report lists for each position the target set by the field manager, the percent of staff hired to meet the target, the total staff hires for the position. It also includes a count of field staff for each hiring status, the number of trouble shooters hired and the number of prospects identified. A sample page of the Territory/region/Area report is below.

Field Manager	Reg. Area	Target	Pct	Total	Intend	Hire-Key	Hire-Form	Hire-Clear	Trouble	Prospect
NAEP 2005 Field Recruiting System (FRS)										
Hiring Status Report - Assessment Administrator										
Page 1										
10/17/2004										
MARY JANE GERMAN		305	73%	223	200	21	2	0	0	17
	AR1	30	70%	21	17	4	0	0	0	9
	AR1-1	5	100%	5	5	0	0	0	0	0
	AR1-2	5	60%	3	3	0	0	0	0	2
	AR1-3	5	60%	3	2	1	0	0	0	4
	AR1-4	5	60%	3	2	1	0	0	0	1
	AR1-5	5	60%	3	3	0	0	0	0	0
	AR1-6	5	80%	4	2	2	0	0	0	1
	AR1-10									0
	AR2	30	90%	27	18	8	1	0	0	4
	AR2-1	5	100%	5	3	2	0	0	0	0
	AR2-2	5	80%	4	2	1	1	0	0	0
	AR2-3	5	100%	5	3	2	0	0	0	0

5.3.2 Personnel Forms and Activities Report

The report may be sorted by last name, territory-region-area, or position. The selection criteria include hiring status, position, Project, Field Manager, region, state, county, and city.

The Personnel Forms and Activities Report lists the status of each form and activity for the selected records. A key to the codes for each item is at the bottom of the report.

Status: CO - Complete, IC - Incomplete, OF - On File, AW – Awaiting, DI – Distribute, NA - Not Applicable, RS – Resubmitted, EX – Expired, GA - Given to Applicant, RF - Received in Field, AP – Approved, and RP - Reprocessing. A sample is below.

10/19/2004 12:46:57PM		NAEP 2005 Field Recruiting System Personnel Forms and Activities Report													
Name	Hire Status	Start Date	T-R-A	Pos	Pers	FWA	Eval	App	D	D Docs	W4	St Tx	Dir Dep	Non Di	
CRESPIN, LAURO J.	Intend to Hir	-Put	12/1/04	2-NM1-3	AC	DI	DI	CO	CO	OF	DI	DI	DI	DI	
ESPINOSA, KAREN M.	Intend to Hir	-Put	12/1/04	2-NM1-4	AC	DI	DI	GA	DI	DI	DI	DI	DI	DI	
KARASZ-ROTHELL, JA	Intend to Hir	-Put	12/1/04	2-NM1	AC-T	DI	DI	CO	CO	OF	DI	DI	DI	DI	
RIVERS, RICHARD M.	Intend to Hir	-Put	12/1/04	2-NM1-5	AC	GA	DI	CO	CO	OF	GA	GA	GA	GA	
SAGE, LOLITA T.	Intend to Hir	-Put	12/1/04	2-NM1-2	AC	DI	DI	CO	CO	OF	CO	CO	NA	CO	

5.3.3 Do Not Hire Report

The Do Not Hire Report is a list of all persons considered ineligible for rehire by Westat or for NAEP. Not all data is available for each person, but wherever available the report lists name, city, state, ZIP Code, county, WINS#, and Social Security Number (last four digits only). There is a page-break between Westat Do Not Hire and NAEP-Do Not Hire lists.

5.3.4 Personal Data Sheet

The Personal Data Sheet (PDS) is designed to assist field recruiters in locating, evaluating, selecting, and hiring field staff for the various territories, regions, areas, and positions. ***The data printed on these sheets is highly confidential; pages must not be shared with unauthorized persons, and must be shredded or returned to the home office when no longer needed.*** The PDS lists the following for each person selected:

- Name – Legal Last, First Middle;
- Residential Address, City, State, and ZIP Code;
- County and Pay Area;
- Phones 1 and 2, Cell, Fax, Emails – Westat and Other;
- Availability;
- Profile Data: Highest Education, Education-related, Highest Education Job, Number of Years of Education Experience;
- Travel Preference and Note;
- WINS #;
- Current Activity: Project, Position, Hire Status, T-R-A, Supervisor, Start and Release Dates;
- Skills and Fluency;
- Previous Westat Experience; and
- Staff Notes.

The sheets can be sorted (ordered) by last name, territory-region-area, or position. Selection criteria for this report include: hiring status, position, project, field manager, region, state, county, and city.

Personal Data Sheets Request

Sorted Report By: Last Name

Enter Selection Criteria:

Hiring Status: All

Position: All

Select Project: Pick first

Field Manager: Pick second

Region: Pick last

State of Residence: [dropdown]

Get County [text box]

City: [text box]

Run Report Reset

Each person may have one or more pages, depending on their Westat history. Also, the selection criteria may be quite broad (e.g., all persons living in the state of California). For this reason, the report will limit the number of pages that are printed so that the field printers are not mistreated, printer malfunctions do not arise, and printer cartridges are not abused.

A PDS may also be printed for an individual by clicking on the PDS button on the upper portion of an individual's screen. A sample report is on the next page.

Confidential

NAEP Personal Data Sheet

Rank: _____

MORGAN, JANE C

MORGAN, JANE C

Address: 123 MAIN STREET
SMALLVILLE AL 35030

Availability: Available
Highest Educ: Some Graduate
Educ-related?: Yes No
Highest Educ Job: _____
No. Years Educ Exp: _____

County: HUGE Pay Area: 1

Phone1: 205-555-6789

Phone2: _____

Travel: Extended

Fax: _____

Travel Note: _____

Email Westat: _____

WINS: 111-2345

Email Other: _____

Special Skill(s): Spanish, Fluent
Sign Language, Not Fluent

Current NAEP Activity

<u>Project</u>	<u>Position</u>	<u>T-R-A</u>	<u>Hire Status</u>	<u>Supervisor</u>	<u>Start</u>	<u>Rls Date</u>
NAEP-2005	AC	TS-3-1	Hired-All Forms	Ellig, John	11/15/04	03/15/05

Westat Experience

<u>Project</u>	<u>Position</u>	<u>Eval</u>	<u>Project Contact + Phone</u>		<u>Supervisor</u>	<u>Start</u>	<u>Rls Date</u>
NAEP-2006	Reserve		Lea_s	301-294-2015		08/01/05	03/30/06
Some Study	Recruit		Morgan_A	240-453-2609		12/15/04	12/25/04
NAEP-2002	AC	1	Lea_s	301-294-2015	BIRD, JUNE	1/5/02	3/8/02
NAEP-2003	AC	1	Lea_s	301-294-2015	Gilberti, Callie	12/5/02	2/8/03
NAEP-2004/LTT	AA	1	Lea_s	301-294-2015	German, Mary	9/5/03	3/21/04
NAEP	AA	1	Lea_s	301-294-2015	German, Mary	9/5/02	3/21/03

Staff Notes:

Note by Note Date Notes

Susan Lea 02/26/04 Free-form text for notes. Home office or field staff with access to FRS may enter notes pertaining to this person for all other users to view.

Annette Morgan 03/01/04 Last 5 notes will be listed here and the latest 6 experiences should be listed on this report.

Not Interested/Release Contact _____ Other: _____

Shred or Return to Home Office Do Not Share with Unauthorized Persons

Confidential

Printed: 03/25/04

Confidential

5.3.5 Region\Area Cross Reference Report and the Gaining Cooperation Supervisor Listing

The Region Area Cross Reference Report and the Gaining Cooperation Supervisor Listing are reports used by the home office and the field managers. You will not need to run these reports on a regular basis.

5.3.6 State Prospect Listing

The State Prospect Listing is a quick listing of all prospects available by state. Select a state and run the report.

The report will list all of the prospects available in the selected state. Information listed includes name, hiring status, position, T/R/A (territory region area), state, county, and phone number. A sample report is below.

10/17/2004 1:10:15PM		NAEP 2005 Field Recruiting System Prospect Listing				
Name	HiringStatus	Position	T/R/A	State	County	Phone
ADAM, KAREN	Prospect	AA	8	KS		9132689344
BACHELANI, SAKUBAI	Prospect	AA		KS		9138889439
BACHELANI, SAKUBAI	Prospect	AA		KS		9138889439
BLANK, SHARIM.	Prospect	AA		KS		9138971827
BODNER, JOANNE R.	Prospect	AA		KS		9133627519
BURCH, WILLIAM	Prospect	AA		KS		9134918375
BUSCH, KATHY	Prospect	AA		KS		
GAMBRELL, HEATHER	Prospect	AA		KS		9133413298
MATHEWS, KENT	Prospect	AA		KS		9134388187
SALVATORELLI, DEBORAH	Prospect	AA		KS		9136821241
SNODGRASS, SCOTT	Prospect	AA		KS		9132547807
WILLIAMS, STACEY E.	Prospect	AA		KS		555559999
ROSSBACH, LUCILLE KATHRYN.	Prospect	AA	8	KS	CHEYENNE	7853322308
KETTLER, SARAHL.	Prospect	AA	8	KS	DOUGLAS	7858414034