


## Quick Reference – LEAD Process Steps

### STEP 1 – Create the LEAD extract file in Infinite Campus

1. Go to the LEAD Extract page in Infinite Campus: PATH: Index > KY Reporting > LEAD Extract
2. Enter the Date Range for the report
  - a. For the Fall submission the Date Range should be from the start of school to the end of December
  - b. For the Spring submission the Date Range should be from the start of school to the scheduled end of school in May
3. Select “Fall” or “Spring” as the reporting period
4. Select a report Format. For LEAD extract, select XML as the format
5. Select the Calendars to include on the report
  - a. Select “Active Year”
    - i. *To review smaller data sets* you can select one school or multiple schools using the Ctrl key – make sure to select all calendars within one school.
    - ii. *When doing the final LEAD report*, all calendars **must** be selected by using the Shift key to select multiple calendars
6. Click “Generate Extract”
7. If an error report is generated, review the errors – continue even if errors are not clear the first time (will need to be cleared before the final upload)
8. Select “Click Here” to generate final extract
9. Save the xml file (preferably to a LEAD folder on your desktop)
10. Zip the xml file
  - a. Find the file that was just created
  - b. Right click on it
  - c. Select “Properties” and verify the created date (make sure you’ve got the correct file)
  - d. Right click again and select *Send To>Compressed Folder*

### STEP 2 – Upload the file to the EPSB website

1. Go to the EPSB LEAD application
  - a. [www.epsb.ky.gov](http://www.epsb.ky.gov), log in and select LEAD OR
  - b. <https://wd.kyepsb.net/EPSB.WebApps/LEAD/> to go directly to the application after log in
2. Select “Upload Files” from the top bar
3. Click “Browse”
  - a. Select “Desktop” and then the folder where you saved your LEAD file
  - b. Click the zipped file created during the extract process (file will have the zipper icon - )
4. Click “Upload”
5. Once screen says “Back,” your upload is complete

**After the first upload only:** have the schools review the staff list for inaccuracies using the full data report

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### STEP 3 – Open and review the report

1. While still in the LEAD application, select “Reports” from the top bar
2. Click the PDF icon beside the district name in the “Preliminary” Column
3. Check the File Export date in the File Summary
4. Review the first page of each school for “SSN” and “No Courses” errors (Staff warnings).
  - a. These must be resolved before final submission
5. Review each teacher’s individual listing for any LEAD issues

### STEP 4 – Correct issues

1. Once you have identified Staff Warnings and LEAD certification issues, go back to Infinite Campus
  - a. Make needed corrections
  - b. Contact teachers about certification issues
  - c. Contact the district finance officer for MUNIS jobclass code corrections
2. Repeat Steps 1, 2, and 3 as many times as needed

**STOP HERE – these steps will be repeated multiple times. Do not move on until most corrections have been made using Infinite Campus**

3. Final edits can be done in the LEAD application (**do not go to this step until all possible corrections have been made in Infinite Campus and uploaded through the LEAD application**)
  - a. Go to the EPSB LEAD application (see Part 2 for the web address)
  - b. Select “Edit LEAD Data” from the top bar
  - c. Click a teacher’s name
  - d. Scroll to the course with the error
  - e. Click “Edit” and make the corrections in the pop up box
  - f. Click “Save” – NOTE: ERROR WILL STILL SHOW UNTIL REPORT IS RUN
  - g. Once all corrections have been made, select “Reports” from the top bar – DO NOT UPLOAD A NEW FILE
  - h. Click the PDF icon beside the district name in the “Preliminary” column
4. IF you upload a new file after changes have been made using the “Edit LEAD Data” page, **those changes will be lost**

### STEP 5 – Submit the report

1. Take one final look at your preliminary audit report to make sure all staff warnings and certification issues have been corrected
2. Send the link to the reports page to the school principals and have the school verify the full data report is accurate (VERY important in Spring before Highly Qualified!)
3. Share a copy of the Preliminary Audit report with your superintendent if there are outstanding issues
4. Select “Signoff and Submit Final LEAD Data” from the top bar
5. Enter your user ID, full name and password
6. Select “Click here to agree and digitally sign”