

Adopting TED

We welcome your interest in adopting TED (California's Training Events Database) into the life of your educational organization! TED is offered to you free by CalSTAT, a special project of the California Department of Education, Special Education Division, located at the Napa County Office of Education.

In this packet you'll find all the forms and steps for Adopting TED.

❑ Step 1 ~ Email to Inquire about the Availability of a Stipend

To support qualifying CA state LEAs in adopting TED, there are a limited number of \$600 stipends available this fiscal year, on a first come first served basis. Email or call Marin Brown marin.brown@calstat.org or 707-481-9139 to inquire about the availability of stipends, and to have her reserve one while you complete the Adoption process.

❑ Step 2 ~ Choose Your TED Configuration

Page 2 provides a worksheet for deciding which TED configuration (single computer, server, or hosted on a network) will work best for your organization, to help determine the Filemaker licenses that will need to be purchased for running TED.

❑ Step 3 ~ Apply for a Stipend

Pages 4-10 provide the stipend instructions and forms, including an MOU, License Agreement, Invoice, and W9. Print and complete these forms. Send in the originals.

❑ Step 4 ~ Purchase Filemaker Software

Use your TED Configuration sheet and the details on page 3 to determine which Filemaker licenses to purchase. Place your order.

❑ Step 5 ~ Preparing for TED's Arrival

Get out the popcorn and have your staff watch two movies and fill out the 3 Things to Do Before TED Arrives worksheet on pages 11-12. Meet as a group and finalize your Funding Sources, Topics, and Roles choices, so you're ready to customize and optimize TED for your organization. Movies found here: calstat.org/preparingforted.html.

❑ Step 6 ~ Setting Up TED

Here are the instructions for installing TED: calstat.org/settingupTED.html Have your Main TED User watch the second movie on this page to guide the initial setup of TED.

❑ Step 7 ~ Learn to Use TED

Have all TED users watch this series of brief training movies for learning the features of TED: calstat.org/learningTED.html That's it. You're ready to use TED... Enjoy!

For questions related to TED: ted.support@calstat.org or Alan Wood, 707-287-0054.

TED Configuration Options

TED operates in FileMaker Pro 11, and can be accessed on either Mac or Windows computers. FileMaker Pro is a desktop application that is relatively inexpensive, and can be purchased with an **educational discount**.

You choose whether TED will run on a Single Computer, a Server, or a Network at your site. Here's how it works.

- You'll **purchase a copy of Filemaker Pro 11 for EACH computer on which someone is going to be using TED** ~ for entering events, registering people, printing name tags, entering evaluations, or generating reports.
Cost approx. \$179 per computer workstation

Jot down in the table who in your organization will be accessing TED for these kinds of tasks. For some organizations that will be one person, for others several people. This will let you know how many & which Filemaker Pro 11 workstation licenses to purchase.

Organization Name:				
Name	Role	Email	Phone	Mac or PC

- If your organization has a **Server**, we **highly recommend that you also purchase Filemaker Server 11**. This will give your designated workstations access to a common TED file and handle automated back-ups of TED. **Cost approx. \$599** (You'll still need to purchase Filemaker Pro for each computer using TED).
- If you do not choose the server option, you can still have several computers working off the same TED file if your **computers are Networked**. **You'll install FileMaker Pro 11 on all computers that will access TED, and on one "host" computer you'll install TED**. All those who want to access TED will connect to the computer where TED is hosted, via the network. For hosting, you can use the computer of the main TED user or a seldom-used computer in the office. TED will have to be open on the host computer for the other computers to access it.

Server or Networked	Name of Your IT Person	Email	Phone

Purchasing Filemaker

Refer to your **TED Configuration Options sheet** for how many and which types of licenses will need to be purchased (Mac or PC, Server version or not).

- TED runs on Filemaker Pro 11 software, which you will need to purchase for your organization for EACH computer that you want to have TED operate on.
- And, if you want to run TED from a server, you'll need to purchase Filemaker Server 11.

Currently Filemaker 12 has come out, but we are using Filemaker 11 for TED, so you will need to purchase Filemaker 12 plus an inexpensive downgrade license to get Filemaker 11.

You may want to contact Eric Williams at CDW (866-339-7929), who is one of the educational sales reps. If he is not your district's/organization's CDW representative, he can pass you along to the right person.

CDW has provided a general quote (below) at the educational prices, so you can have an idea of what you'll need to order and budget for the software. But, your sales rep can determine whether additional discounts might apply due to other Filemaker licenses already purchased by your district or site.

There are a few things to be aware of:

1. If you are going the Server route, you will want to purchase (1) Filemaker Server v12 at \$599 plus a v11 downgrade at \$6.76.
2. You will need to purchase Filemaker Pro 12 for each computer workstation on which you'll be using TED. The price is about \$179 each. If purchasing 5 or more there will be a bulk discount. Choose outright purchase, not annual subscription.
3. You will also need to purchase (1) Filemaker Pro v 11 downgrade for \$6.76 (only 1, not for each workstation).

You can purchase Filemaker from other sources, just be sure to ask for the educational discount. The information above is simply provided to help you to be clear on what you'll need to purchase.

We hope this provides what you need for creating your purchase order and obtaining Filemaker!

Applying for a Stipend

Complete all the documents listed below.

Save copies of everything for your files.

Mail the originals of everything to the address at the bottom of the page.

The Memorandum of Understanding (MOU) with NCOE is for the \$600 Stipend.

- On the first page after “requested by” fill in your Site’s Name as the “Recipient LEA” and the date. Also on the first page fill in your Site’s Fiscal Agent Name and your Site Name in the blanks provided.
- Complete the “Who Are You?” box with your Fiscal Agent information and Site information.
- Have the appropriate person Sign and Date the MOU on the second page.

The TED Software License agreement.

- On the first page, put in the date, and your site name (as the Sublicense) and location.
- On the second page, put your site name as the Sublicensee, then have the appropriate person sign the “By” line and put in the date and their name and title.

Invoice

- You can use the Invoice template provided; just fill in your site’s info and the date and location of the services (**Please date your invoice 15 days from the date you submit to CalSTAT**).

W9

- Complete a **W9** and submit. The name and address on the W9 must match the name and address on the invoice.

Submit originals of the TED Configuration Options, MOU, Software License, Invoice and W9 to:

CalSTAT Project – TED
Attention: Marin Brown
Napa COE
5789 State Farm Drive, Suite 230
Rohnert Park, CA 94928

NAPA COUNTY OFFICE OF EDUCATION

CalSTAT Project

Memorandum of Understanding

CalSTAT, a special project of the California Department of Education, Special Education Division, administered by the Napa County Office of Education (NCOE), will provide funds (Technical Assistant dollars) to support professional development. These funds were requested by _____ (RECIPIENT LEA), on _____ and were approved for use for the following purposes:

Name of Event	#TA "Days"	# Dollars
TED Stipend	1	600.00
Total		600.00

Funds in the amount of \$600.00 will be paid directly to the Fiscal Agent: _____ on behalf of the RECEIPT LEA _____ upon processing MOU and License Agreement documents.

Who Are You?	
Fiscal Agent:	_____

LEA Requestor	_____

Issued By: (CalSTAT Staff) Marin Brown

Date: _____

INDEMNIFICATION

RECIPIENT LEA agrees to hold harmless, indemnify and defend NCOE and its trustees, employees, agents and volunteers from any and all claims, damages, losses and expenses, including attorney fees, arising or resulting from damage to property, injury or death to any person, firm or corporation in connection with the completion of the professional development activity funded by this agreement. RECIPIENT LEA also agrees to hold harmless, indemnify and defend NCOE and its trustees, officers, and employees from any and all claims or losses incurred by any supplier, contractor, or subcontractor furnishing work, services or materials to RECIPIENT LEA in connection with the completion of the professional development activity funded by this agreement.

ACCEPTANCE BY RECIPIENT LEA

Signature of Authorizing Official

Date

Print Name and Title of Authorizing Official

TED Software License Agreement

This Software License Agreement (“Agreement”) is entered into on _____
Date

between the **NAPA COUNTY OFFICE OF EDUCATION State Personnel Development Grant** hereinafter “NCOE”, located in Napa, California, and:

_____ (“Sublicensee”),

located at _____, California.

In consideration of the benefits and obligations exchanged in this Agreement, the parties agree as follows:

1. The term “Software” as used in this agreement shall mean the Training Events Database or “TED” developed by NCOE under contract with the State of California, Department of Education, Special Education Division who is the owner of the copyright.
2. Sublicensor hereby grants, and Sublicensee hereby accepts a nontransferable, non-exclusive, worldwide, and royalty-free license to use the Software, subject to the conditions and for the period specified in this Agreement.
3. Sublicensee agrees to use the Software for its sole and exclusive benefit at its location only.
4. NCOE is not under any obligation to install, test, maintain, update or modify the Software or provide technical support services to Sublicensee. No such obligation on the part of NCOE shall arise or be implied on the part of NCOE or its agent by the undertaking of such actions or services at any time.
5. Sublicensee will provide NCOE or its agent with information and feedback on its use and the functioning of the Software upon reasonable request.
6. Sublicensee shall indemnify and hold sublicensor harmless from any claims, losses, costs, damages, expenses, or liability arising out of or in connection with its installation, testing, maintenance, modification, or use of the Software, including any loss of data or other occurrence caused by any corruption, deletion or nonperformance of the Software.
7. This Agreement shall remain in effect for as long as the State of California, Department of Education, Special Education Division permits NCOE to distribute the Software unless this Agreement is terminated prior to that time by written notice to Sublicensee.

SUBLICENSOR: Napa County Office of Education

By: _____ Date: _____

Josh Schultz, Chief Business Officer

SUBLICENSEE: Name: _____

By: _____ Date: _____

Print name and title: _____

INVOICE

BILL TO:

Napa County Office of Education – CalSTAT Project
 Attention: Accounts Payable
 Requested by: Marin Brown
 5789 State Farm Drive, Suite 230
 Rohnert Park, CA 94928

Date:	
Invoice #:	

PAYEE: (Name and Address *must* match W-9)

Name:	
Address:	

DESCRIPTION (PLEASE INCLUDE DATE(S) OF SERVICE & RATE OF PAY)	AMOUNT
Date:	
Location:	\$600.00
TED Stipend: Selected to implement use of the non-web-based TED software for tracking training participation and feedback.	
Rate: \$600.00	
TOTAL	\$600.00

Print Name:	
Signature:	

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification (required): <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶	
	<input type="checkbox"/> Other (see instructions) ▶	
Address (number, street, and apt. or suite no.)		Requester's name and address (optional)
City, state, and ZIP code		
List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number									

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number									

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

3 Things to Do Before TED Arrives: TED Funding Sources, Topics, & Roles Worksheet

Funding Sources

List here the Names of the Funding Sources, Grants, or Programs you want to add into TED. Later, when you enter events into TED, you'll select a Funding Source for each event, which will enable you to generate Summary Reports specific to these Funding Sources over time. You can enter as many Funding Sources as you wish into TED, as you go along.

- 1)
- 2)
- 3)
- 4)
- 5)

Topic Areas

You can list up to 13 Topic Areas in TED. We've listed TED's default Topic Areas below. Choose only those default Topic Areas relevant to your organization's work, then add in customized Topic Areas to cover the rest of your work. Each time you set up a new event in TED, you'll enter which Topic Areas it covers. Then, in the Summary Reports, you'll be able to see what events were offered, and who from which organizations has attended trainings, in which Topic Areas. Once you set your list of 13 Topic Areas, you need to keep them the same from then on. Try to leave a couple of open spots for topics that emerge over time.

13 Topics	Your Site's Topic Areas	TED's Default Topic Areas
1)		Alternate Dispute Resolution
2)		Auditory
3)		Autism
4)		Family and Professional Partnerships
5)		Individuals with Disabilities Education Act
6)		Least Restrictive Environment
7)		Mathematics
8)		Other Core Standards
9)		Positive Behavioral Supports/Safe Schools
10)		Reading/Language Arts
11)		Special and General Ed Collaboration
12)		Transition
13)		RTI

Roles

You can list up to 9 Primary Roles in TED. We've listed TED's 7 default Primary Roles below. **There is room for you to add in two other Primary Roles** that might be important in your work. Each time you set up a new person in TED, you'll enter their role. Then, in the Summary Reports, you'll be able to see the Roles of those you are serving. You'll also be able to send out emails to those from specific roles in promoting your events.

Another group of Roles in TED are those of Other Certificated Professionals (OCP). You can add in as many OCP Roles as you wish. They will all be summarized in the reports under the role of Other Certificated Professionals. But, you will still be able to select and send emails to people from these individual OCP roles as needed.

9 Primary Roles	Your Site's Primary Roles	TED's Default Primary Roles
1)		Teacher – Special Education
2)		Teacher – General Education
3)		Administrator – Special Education
4)		Administrator – General Education
5)		Paraprofessional
6)		Parent / Family
7)		Program Specialist
8)		<i>open</i>
9)		<i>open</i>

Unlimited	Your Site's OCP Roles	TED's Default OCP Roles
1)		Speech and Language Pathologist
2)		Psychologist
3)		Reading Specialist
4)		Adaptive PE
5)		Occupational Therapist
6)		Nurse
7)		Program Specialist
8)		CDE
9)		<i>open, as many as you wish</i>

Before actively using TED, it's important to make these decisions. Then enter your Topics and Roles under TED's Administration Menu – View/Edit Profile section. They'll show up in Topics and Roles drop-down menus in TED. Add your Funding Sources directly into the main TED window Funding Source drop-down menu as you need them.