2025 SUMMER CONFERENCE

Personnel Reporting in IC

Nicole Thuotte
EDUCATE – Office of Public Instruction

Session Description

Who are these people, what do I do with them and where does this information go? Your comprehensive guide to personnel reporting in Infinite Campus – and a mapping of how personnel data entered in Infinite Campus is used.

Personnel in Infinite Campus

Who is required to be entered in Infinite Campus:

Any staff member employed or contracted by the district to provide services to students.

Includes:

- Teachers
- Administrators
- Administrative Assistants
- Special Education Service Providers
- Substitutes
- Short-Term Workers
- Food Service Workers
- Bus Drivers
- Short-Term Workers

Personnel in Infinite Campus

Why are we entering school district staff in the student information system?

- Streamline data reporting – one system
- Allows the assignment of staff to districts, schools, students and courses for Accreditation, Special Education, Career and Technical Education, School Finance, etc.

What Do We Collect?

- Employment Dates
- Assignment District and/or School(s)
- Full-Time Equivalent (FTE)
- State Assignment Code
- SPED Level
- Specialized Role(s)
- Supervisor(s)
- Credentials

MASBO 2025 NAVIGATING CHANGE

Assignment Code Matrix

The State Assignment Code Matrix outlines the position codes used for identifying the role of school district employees. The Matrix contains information on the following:

- Position Code
- Description
- Definition – New for 25-26!
- QEC Eligibility
- Level
- FTE Requirement
- Other Required Fields
- Credentials (Licensure/Certification, SPED, Paraprofessional)

Assignment Code Matrix

Position Code

Position Codes are based on the role of the staff member within the district.
Position Codes are used in the following ways:

- Eligibility for Quality Educator Payment
- FTE counts for Accreditation
- Special Education requirements

Position Codes are grouped using the first two letters of the code:

AD = Administration
DS = District Staff
PC = Program Coordinator
PP = Paraprofessional
RT = Retired
SE = Special Education
SP = Specialized Personnel
TC = Teacher

Assignment Code Matrix

Some codes “go with” other codes:

- DS11: Extra Duty– Requires Educator License
- DS12: Extra Duty– No License Required
- DS13: Extra Duty– Requires Professional License

These positions are for stipends in addition to regular salary, not including Coaches or Extracurricular Staff

Assignment Code Matrix

Assignment Codes must reflect the duties of the individual in the position – not necessarily the qualifications of the person fulfilling the position.

Example: A classroom teacher should have a State Assignment Code of TC01: Teacher – General Education. A teacher who is not properly licensed and endorsed will be flagged as ineligible for a Quality Educator Component and may show up in Accreditation as a deviation (exceptions for emergency authorizations).

Assignment Code Matrix

Descriptions and Definitions

Descriptions and Definitions are designed to give more information about specific position codes.

Example:
Position Code – SE16
Description – Interpreter
Definitions – Provides services to children who are deaf or hard of hearing, including oral transliteration services, cued language transliteration services, and sign language interpreting services.

The Description provides some detail about the position code, but, in this case, the Definition further limits the code to interpreters for deaf and hard of hearing children. Other language interpreters should be assigned Position Code PP03 – Bilingual/ESL Instructional Paraprofessional.

Assignment Code Matrix

Eligible for Quality Educator Payment

These are the *position codes* eligible for Quality Educator Component (QEC). Individual eligibility depends on these factors:

- Educator properly licensed and endorsed by December 1
- Emergency authorized educator licensed by December 1, no more than 3 years
- Professional licensure active on count date

NOTE: An educator listed on a QEC validation report in Infinite Campus is no guarantee that the individual will be included in the district's QEC payment (must meet one of the criteria listed above)

Assignment Code Matrix

Level

- SCHOOL
- DISTRICT
- COOPERATIVE

Some position codes require an assignment to a particular school for Accreditation purposes (e.g., Principal, Library, Counseling, Teacher) or State/Federal Reporting (District Clerk, Paraprofessionals). Other staff may be assigned to the “district” (coach, bus driver, administrative assistants).

Cooperatives should only use position codes indicated as COOPERATIVE.

Assignment Code Matrix

District Level Assignments

There are three option in Infinite Campus for District Level Assignments:

- District Level EL
- District Level HS
- District Level K-12

Infinite Campus is set up by SYSTEM, but Personnel are reported by LEGAL ENTITY.

Use the District Level EL/K-12 code to report staff for are District Level for your elementary or K-12 Legal Entity.

District Level HS is only available in districts with more than one high school.

District Edition IC Users:

There are times when a school level assignment is required for functionality, but not for state reporting (e.g., Behavior, Food Service). There are two options:

1. Split the FTE between the School Assignments; OR
2. Mark the School Assignments “Not State Reported” under MT Titles and create a District Level Assignment for state reporting.

Assignment Code Matrix

FTE Required

District ***must*** enter FTE for assignments where FTE is required.

District ***should not*** enter FTE for assignments where FTE is not required.

How do you know if you've made a mistake?

Run the Personnel Validation Reports!

Assignment Code Matrix

District Assignment Fields Required

This column indicates the additional requirements entered on the **District Assignments** tab:

- School (includes District Level EL/HS/K-12)
- Start Date (first date the individual was in the position – important for QEC eligibility)
- State Assignment Code (column A/B)
- FTE (where required only, ***max of 1.0 per assignment***)
- Supervisor *checkbox* (allows the individual to be assigned as a supervisor)
- Special Ed *checkbox* (required for special education staff, also used to assign individuals as Team Members to an IEP)
- MT Titles (used to indicate either a Coordinator or specialized role within a State Assignment Code, Special Education Cooperative Staff, to indicate Cooperative itinerant staff, or exclude from state reporting)
- Supervisors *dropdown list* (person assigned as the staff member's supervisor)
- MT Sped Level (either PK or K-12, split FTE if serving both)
- Teacher (allows the staff member to be assigned to a course)

Assignment Code Matrix

Employment Assignment Information

School
District Level - EL

Department

***Start Date**
09/01/2023

End Date

Title

CTAE Extended Contract Days
0

Type
01:Administrative

FTE of Assignment
0.5

State Assignment Code
AD32:Assistant Superintendent

Teacher	Special Ed	Program	Behavior Admin	Health	Behavior Response Approver	Response to Intervention
☑	☑	☐	☐	☐	☐	☐

Advisor	Supervisor	Counselor	Foodservice	Exclude Behavior Referral	Self Service Approver	FRAM Processor
☐	☑	☐	☐	☐	☐	☐

Activity Staff	Activity Preapproval
☐	☐

MT SPED Level
6 and up (KH/KF to grade 12)

MT Titles
× System Test Coordinator

Supervisors

MASBO 2025 NAVIGATING CHANGE

Assignment Code Matrix

Contractors

Districts must report contractors that are providing direct services to students.

- Special Education Related Service Providers
- Teachers
- Nurses

Note: Not required to report contracted services (e.g., bus companies and their employees)

These individuals are not paid hourly through payroll

Assignment Code Matrix

Consortium (MT Titles)

*New for 25-26

Distinguish Consortium providers from Contractors for Accreditation purposes. Used for covering requirements for Library, Curriculum, and Counseling.

Examples:

- MT Small Schools Alliance
- Golden Triangle Curriculum Cooperative
- School Services of Montana

Assignment Code Matrix

Credentials Fields Required

Credentials are required for:

- Professional staff (licensed through Department of Labor (DLI));
- Paraprofessionals; and
- Special Education teachers.

Assignment Code Matrix

Credentials – Professional Staff

Professional License Staff

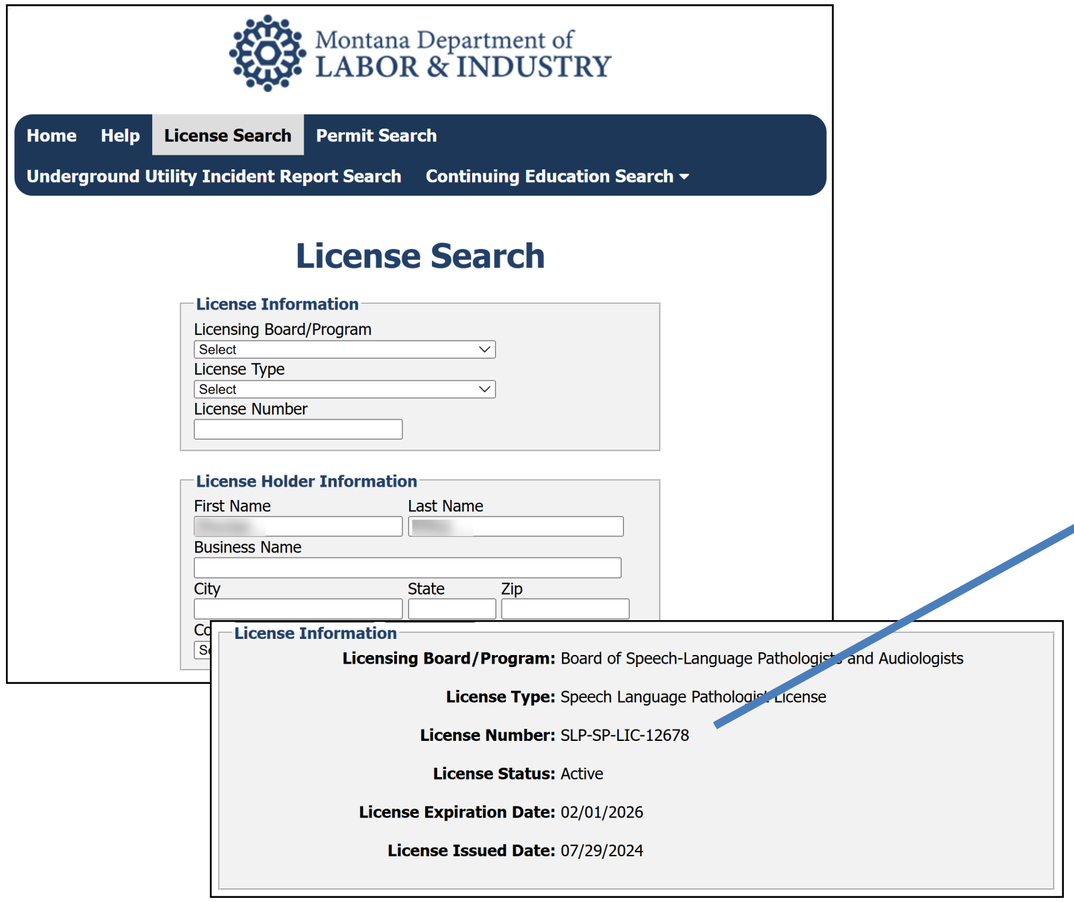
Census>Staff>Credentials>Licensure/Certification

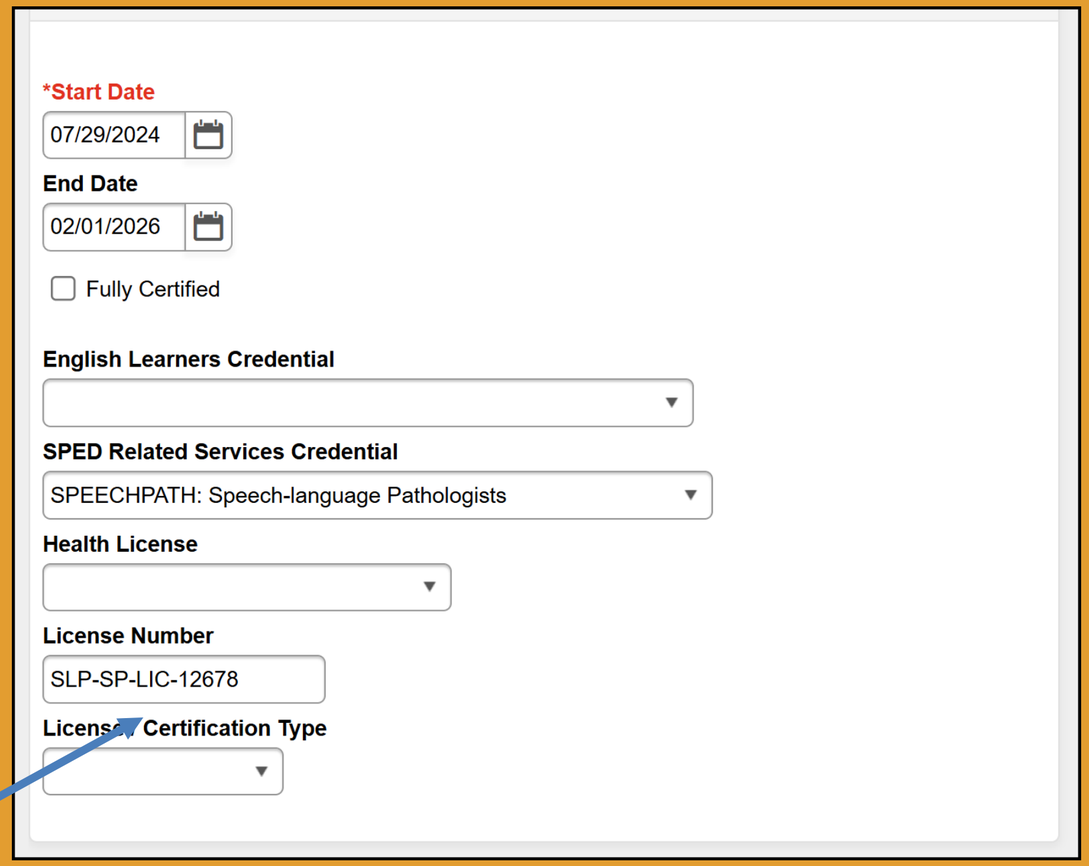
Start Date: License Issue Date (original date)
End Date: License Expiration Date (must be updated as license is renewed)
SPED Related Services Credential OR Health License: Choose License Type
License Number: Enter FULL license number with punctuation (copy & paste)

License Lookup

Assignment Code Matrix

Credentials – Professional Staff





MASBO 2025 NAVIGATING CHANGE

Assignment Code Matrix

Credentials - Paraprofessionals

Five types of Paraprofessionals:

- PP01: Instructional Paraprofessional
- PP02: Title I Instructional Paraprofessional
- PP03: Bilingual/ESL Instructional Paraprofessional
- PP04: Facilitator/Distance Learning (Paraprofessional)
- PP05: Early Childhood Paraprofessional
- SE25: Special Ed Instructional Paraprofessional

Assignment Code Matrix

Credentials – Paraprofessionals

- PP01: Instructional Paraprofessional
- PP02: Title I Instructional Paraprofessional
- PP03: Bilingual/ESL Instructional Paraprofessional
- PP04: Facilitator/Distance Learning (Paraprofessional)
- SE25: Special Ed Instructional Paraprofessional

ARM 10.55.715

Assignment Code Matrix

Paraprofessionals - Supervisor

Instructional Paraprofessional Qualifications: “…under the direct supervision of a licensed teacher who is responsible for instruction and assessment of students.”

Special Education Paraprofessional Qualifications: “…under the supervision of the teacher or other professional designated as primarily responsible for instructional planning for the student.”

Assignment Code Matrix

Credentials - Paraprofessionals

*New for 2025-26
PP05: Early Childhood Paraprofessional

ARM 10.63.105 and ARM 10.63.106

Required for staffing Early Literacy programs: ARM 10.63.107

- *One properly licensed and endorsed teacher for 10 students;*
- *Up to 18 students with an Early Childhood Paraprofessional;*
- *Max of 22 with an additional Paraprofessional assigned to 90 minutes per overload*

Assignment Code Matrix

Credentials - Paraprofessionals

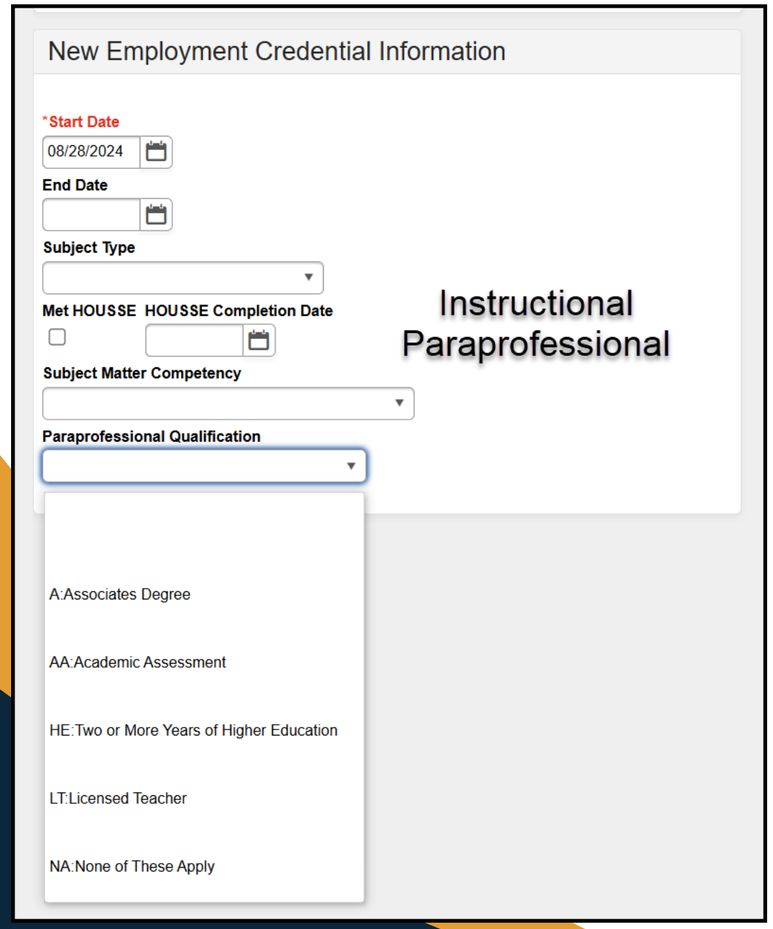
Census>Staff>Credentials>Highly Qualified

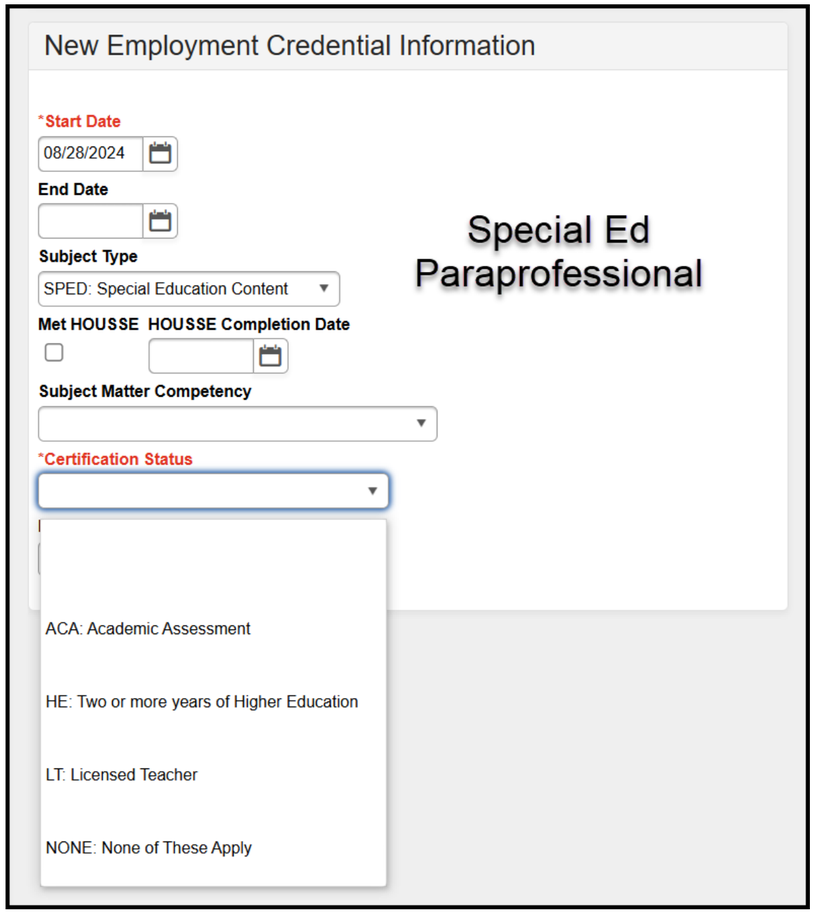
Start Date: Start Date of Assignment
End Date: End Date of Assignment (only required if no longer in position)

- Instructional Paraprofessional
  Paraprofessional Qualification: Select the staff member's qualification (if the qualification changes, end the first record and create a new one).

- Special Ed Paraprofessional
  Subject Type: Select SPED: Special Education Content
  Certification Status: Select the staff member's qualification (if the qualification changes, end the first record and create a new one).

Assignment Code Matrix





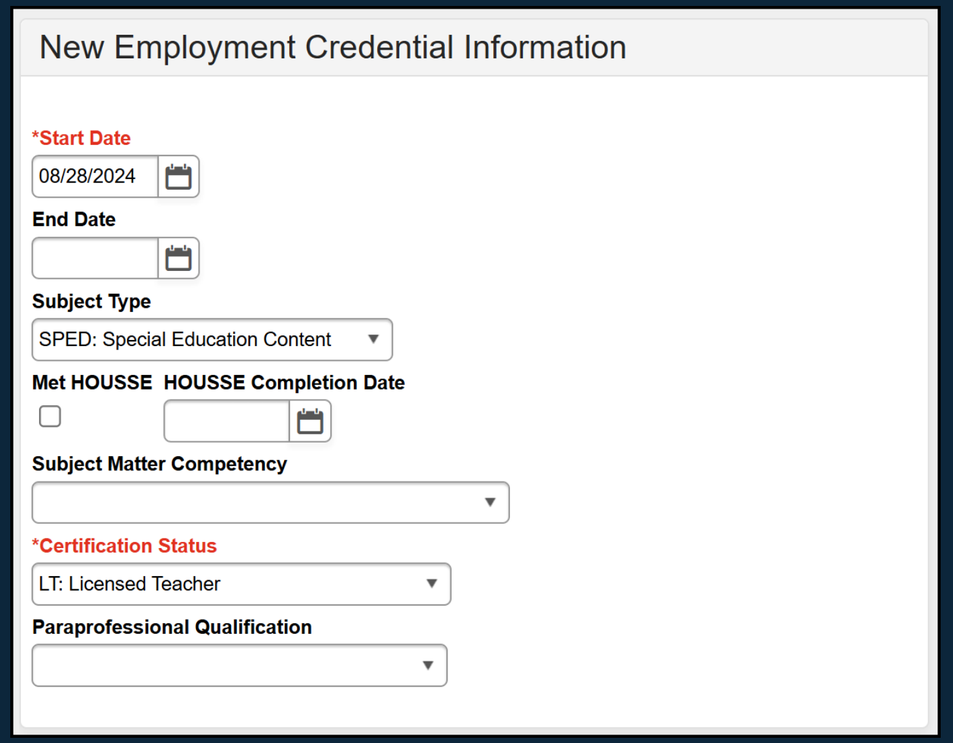
Assignment Code Matrix

Credentials – Special Ed Teacher

Census>Staff>Credentials>Highly Qualified

Start Date: Start Date of Assignment
End Date: End Date of Assignment (only required if no longer in position)

- Special Ed Teacher
  Subject Type: Select SPED: Special Education Content
  Certification Status: Select the staff member's qualification (if the qualification changes, end the first record and create a new one).



Assignment Code Matrix

New State Assignment Codes for 2025-26

- **AD99: County Superintendent** – Allows assignment to MT Titles/ Coordinators (Title IX, Homeless Liaison, etc.). *Not QEC eligible*

- **PC15: Advanced Opportunity Facilitator** – SB 278 "… an individual employed by a school district who coordinates between the school district, a qualifying pupil and the pupil's family, postsecondary institutions, employers, industry associations, community organizations, or any other individual or entity that provides an advanced opportunity." *QEC eligible*

- **PP05: Early Childhood Paraprofessional** – for Early Childhood programs. *Not QEC eligible*

- **SP70: Dietician-Nutritionist** (HB 806) – meets the licensure requirements under Title 37, chapter 25, part 3, MCA. *QEC eligible*

Assignment Code Matrix

Speech/Language & Audiology State Assignment Codes

SE10: Audiologist
SE40: Speech-Language Pathologist

Fully licensed professionals under 37-15-301, MCA

SE11: Audiologist Assistant
SE75: Speech-Language Pathologist Assistant

Licensed under ARM 24.222.550

Assignment Code Matrix

Speech-Language Pathologist Assistant

There's a separate licensure option for individuals serving as a Speech-Language Assistant. These assistants work under a licensed professional.

New Applicants:

- Baccalaureate degree in speech-language pathology or communication sciences and disorders; or
- Assistant certificate or associate degree.

Assistants Under the Old Law:
(served, but not licensed in another state or served in MT prior to January 1, 2024)

- Meet the requirements above; or
- Have a minimum of 690 hours of practical experience under the supervision
- of a licensed professional

Assignment Code Matrix

Audiologist Assistant

There’s a separate licensure option for individuals serving as an Audiology Assistant. These assistants work under a licensed professional.

New Applicants:

- Baccalaureate degree in communication sciences and disorders; or
- Assistant certificate or associate degree; or
- A high school diploma or equivalent and a minimum of 10 hours of additional board approved training in audiology.

Assistants Under the Old Law:
(served, but not licensed in another state or served in MT prior to January 1, 2024)

- Meet the requirements above; or
- Have a minimum of 110 hours of practical experience under the supervision
- of a licensed professional

Assignment Code Matrix

Speech-Language Pathology and Audiology Aide
*New for 25-26 HB744

The Board of Speech-Language Pathologists and Audiologists, “shall establish by rule the qualifications and permitted activities for speech-language pathology aides and audiology aides who are employed by a school district as defined in 20-6-101. The rules may not require the speech-language pathology aide or audiology aide employed by a school district to be licensed by the board.”

Not Eligible for QEC

Assignment Code Matrix

SE16: Interpreter

Interpreters (those providing services to students who are deaf or hard of hearing) are eligible for QEC if they meet the following qualifications:

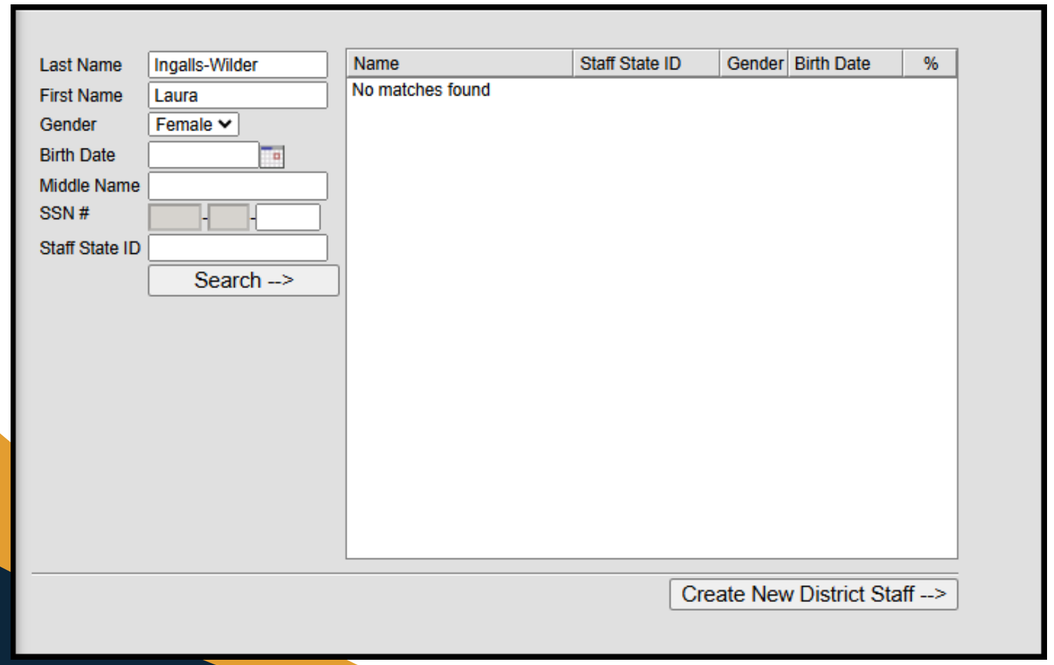
- A competency level of 3.5 or higher on the on the Educational Interpreter Performance Assessment (EIPA) and passed the written portion of the Educational Interpreter Performance Assessment; or
- A competency level of 2.5 or higher on the EIPA or a score commensurate with a competency level of 2.5 or higher on the EIPA Pre-Hire Assessment (3 years to meet #1)

12 clock hours of professional development and/or Office of Public Instruction professional development units per calendar year related to the improvement of educational interpreting, performance, and knowledge skills.

Creating Staff in Infinite Campus

Path: Census>Staff>Staff Locator Wizard

Last Name, First Name, Gender are required for search



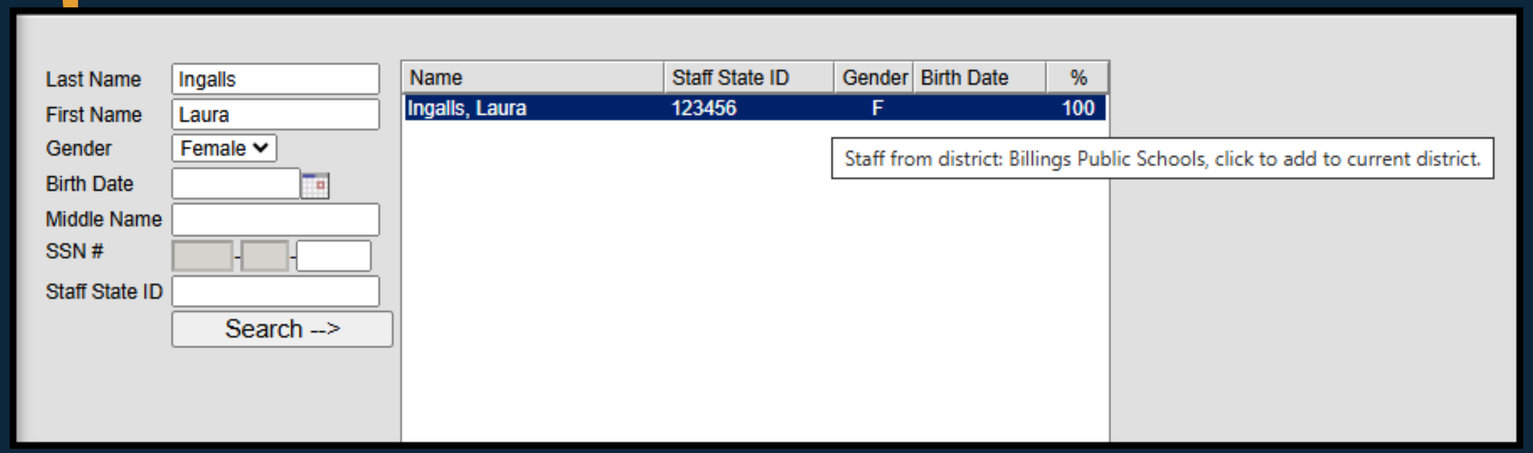
Review matches based on name, Staff State ID, Gender and Birthdate.

Creating Staff in Infinite Campus

Tips:
Last Name – try other names used, hyphenated name, name in TMT
First Name – try nicknames, legal names, middle name
Gender – Alternate Gender

Hover to see prior district(s)!

When in doubt, Create New District Staff



MASBO 2025 NAVIGATING CHANGE

Creating Staff in Infinite Campus

Staff State ID (SEID)

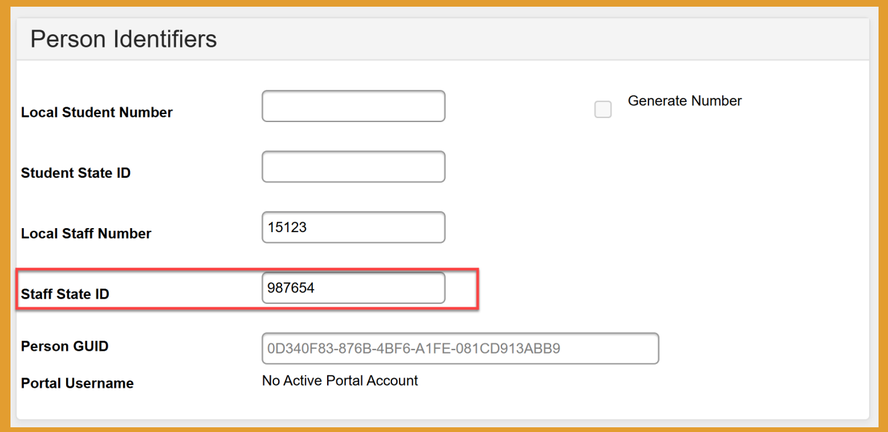
Staff State IDs are generated in the Teach Montana (TMT) system.

SEID Creation Guide

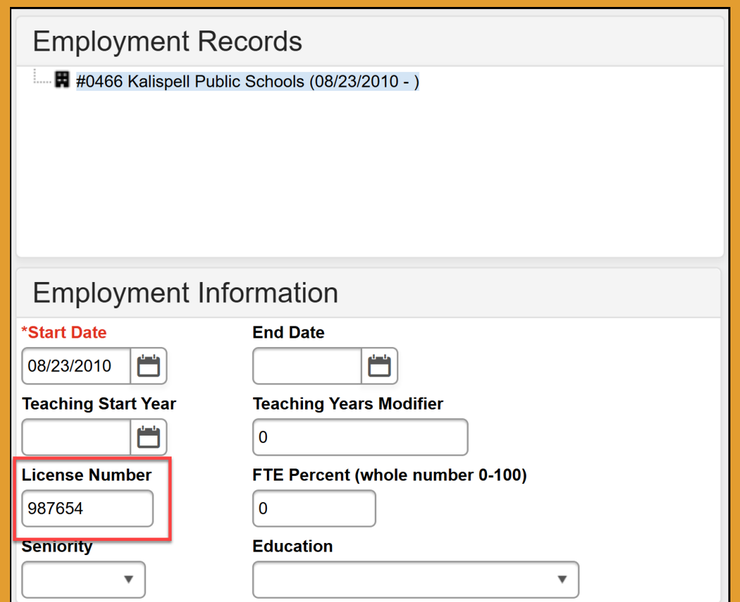
Requires First Name, Last Name, Email, SSN, Birthdate.

NOTE: *Birthdate is not required in Infinite Campus for staff, but we highly recommend adding it (helps reduce duplicates).*

Staff State ID (Infinite Campus) Census>People>Demographics



Staff State ID (Infinite Campus) Census>Staff>District Employment

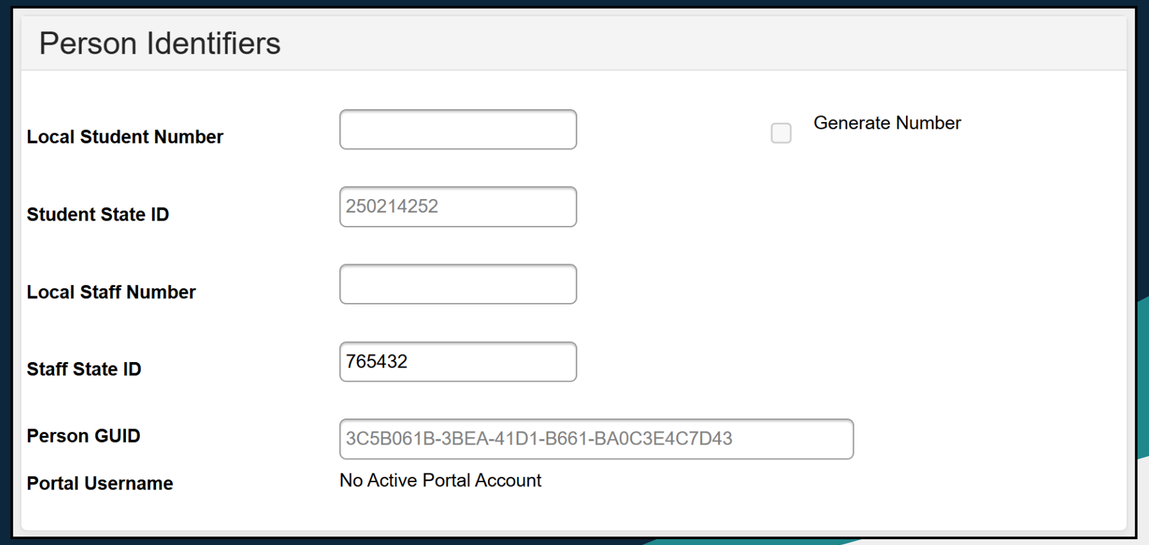


MASBO 2025 NAVIGATING CHANGE

Creating Staff in Infinite Campus

Students Who Become Staff

Students may be staff members either while they are students or years after graduation. They must have an SEID number added as a Staff State ID to their existing Student State ID record (one record per person).



MASBO 2025 NAVIGATING CHANGE

Creating Staff in Infinite Campus

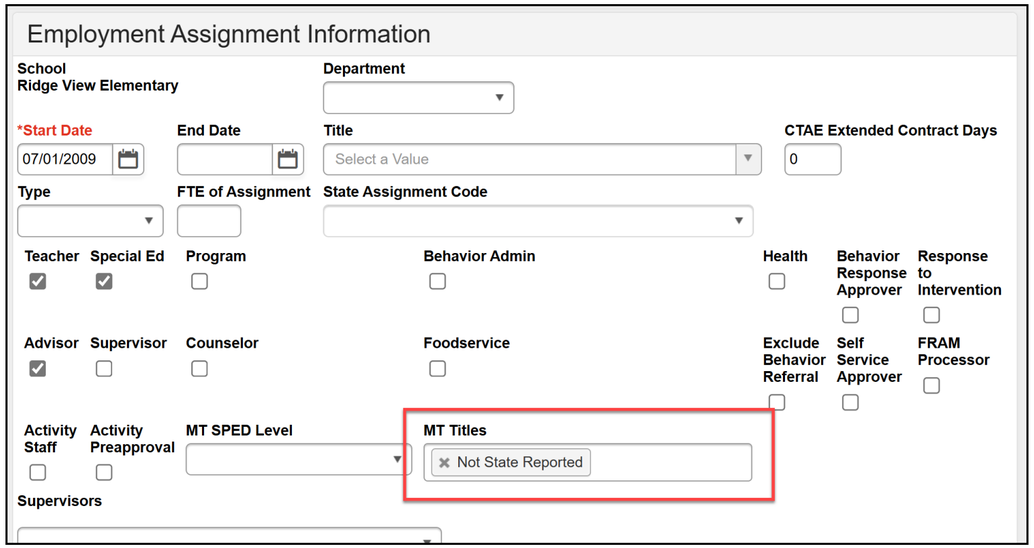
Non-People Records

Districts may create non-person records in Infinite Campus for a variety of purposes. Examples include:

- Administrator, System (Administration)
- Special Education, Teacher (Special Education)
- Substitute, Teacher (Staffing)
- Lunch, Adult (Point of Sale)

Previous guidance was to enter 999999 as the Staff State ID.

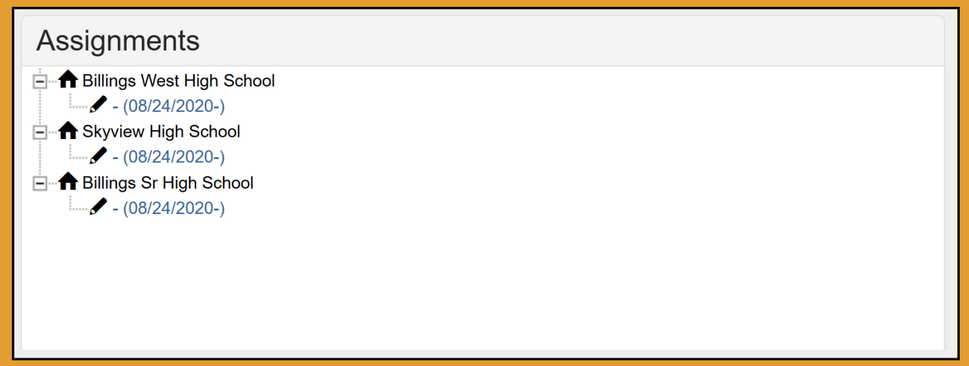
*New for 25-26 – Use MT Titles “Not State Reported” in the District Assignment

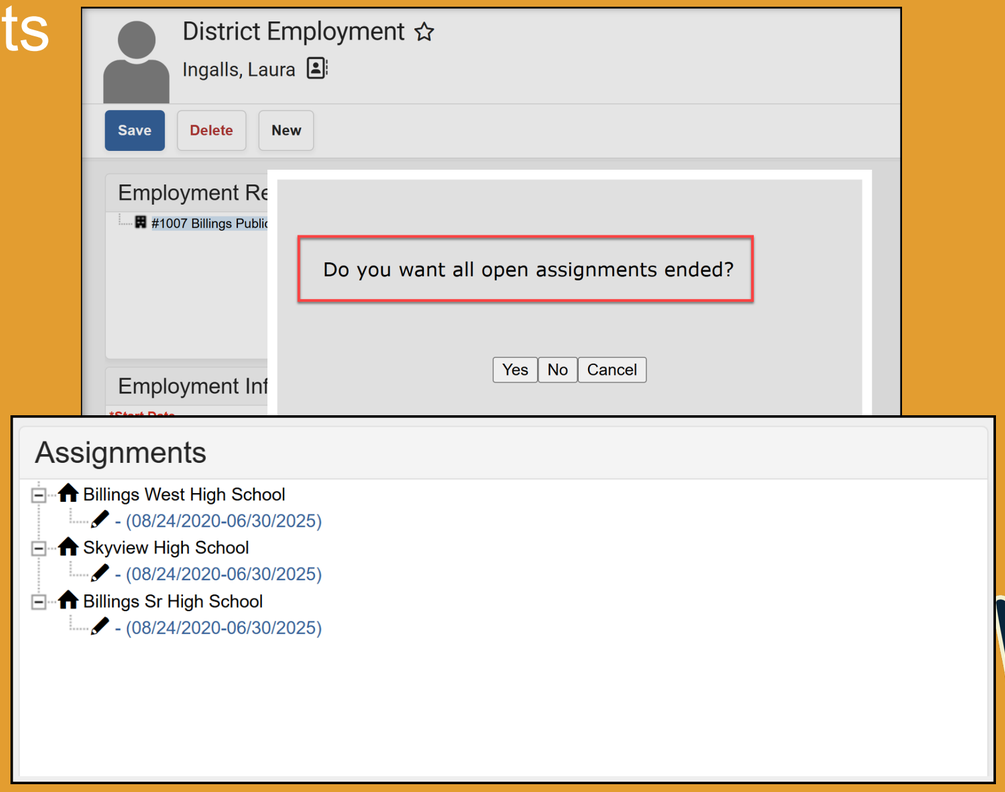


Modifying Staff in Infinite Campus

Modifying Staff – Ending Employment

- End Date the District Employment Record– option to end all open District Assignments





MASBO 2025 NAVIGATING CHANGE

Modifying Staff in Infinite Campus

Modifying Staff – Changing Assignments

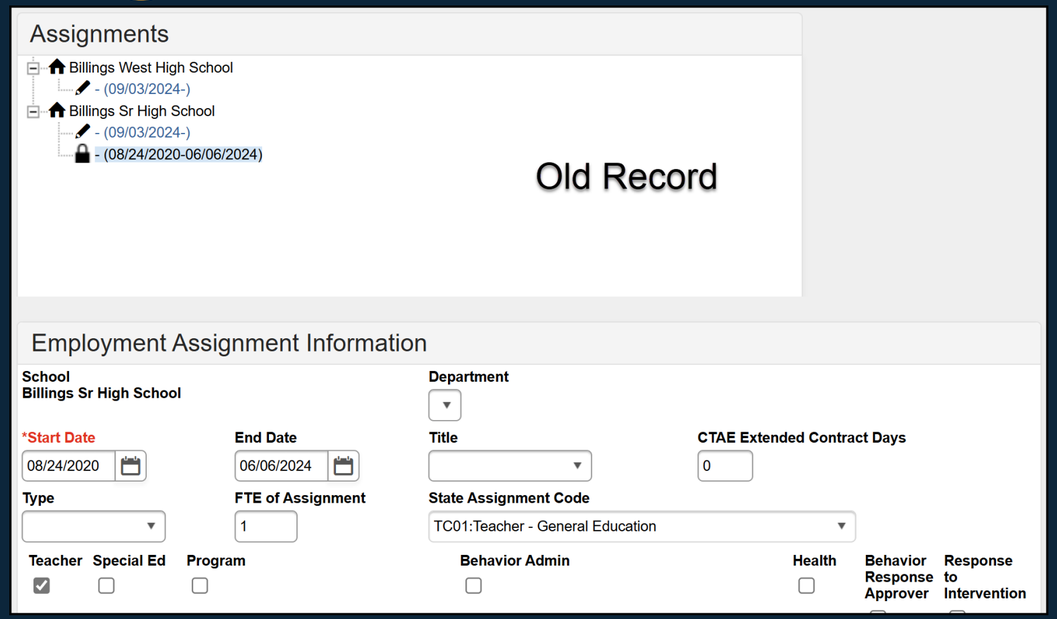
District Assignments should not be modified once entered – unless an error is discovered.

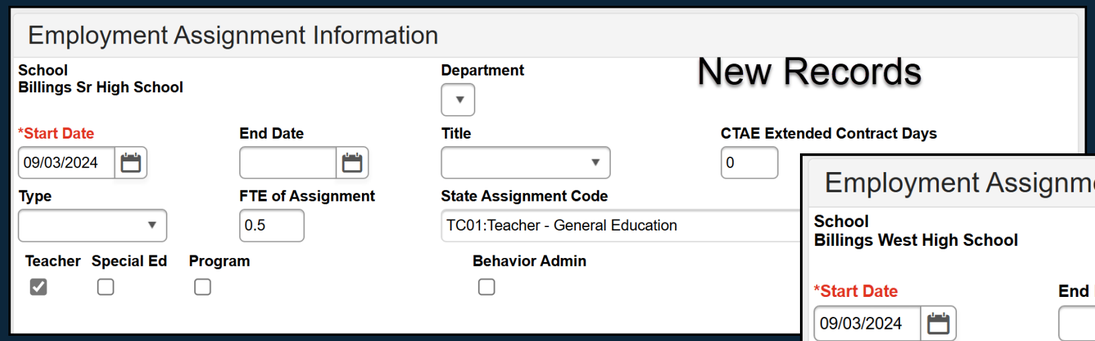
Changes requiring a new District Assignment:

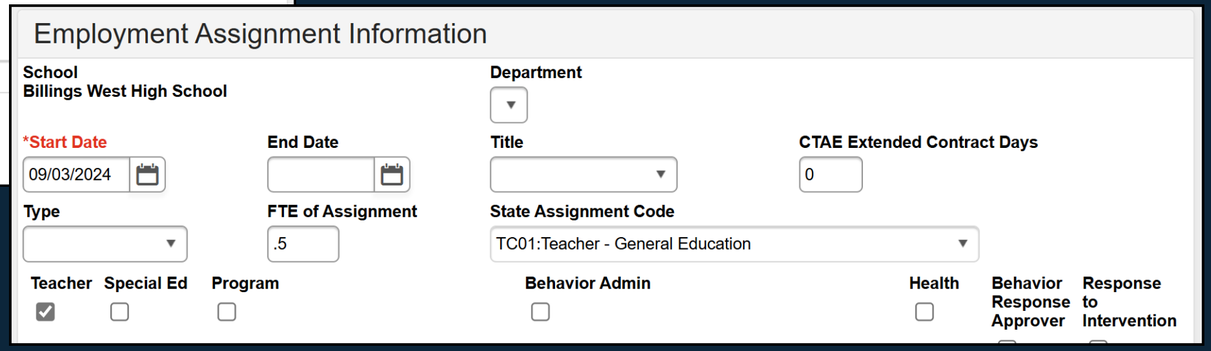
- Change in School
- Change in FTE
- Change in State Assignment Code
- Change in SPED Level
- Change in Supervisor
- Change in MT Titles

When in doubt, end the Assignment and create a new one

Modifying Staff in Infinite Campus







Staff Entry Considerations

Staff Data is Used For:

- State and Federal Reporting
- Accreditation
- Compensation Expenditure Reporting in MAEFAIRS

Staff data in Infinite Campus is entered by School System, but reported for Accreditation and MAEFAIRS by Legal Entity

Staff Entry Considerations

Accreditation

There are staffing requirements for certain positions:

- Superintendent – FTE requirement based on FTE of licensed staff
- Principal – FTE requirement based on combination of FTE of licensed staff and enrollment by school
- Counseling – Districts with less than 126 in enrollment may contract, utilize a consortium, or interlocal cooperative. FTE is .0025 x enrollment, up to 400 students (1.0 FTE at 400).
- Library – FTE requirement based on enrollment in school. Districts with less than 126 in enrollment may contract, utilize a consortium, or interlocal cooperative.
- Curriculum - Districts with 100 or more licensed FTE must employ a full-time curriculum coordinator. Districts with less than 100 licensed FTE
- may contract, utilize a consortium, or interlocal cooperative, or
- employ a part-time coordinator.

Staff Entry Considerations

MAEFAIRS

What Legal Entity (LE) is the staff member's salary paid from?

Errors on Compensation Expenditure Reporting when the staff member is paid from one LE and assigned to another in Infinite Campus.

Suggestions:

Reconcile HR reports (with FTE) to Infinite Campus Personnel Reports.

Ensure that HR is aligned to:

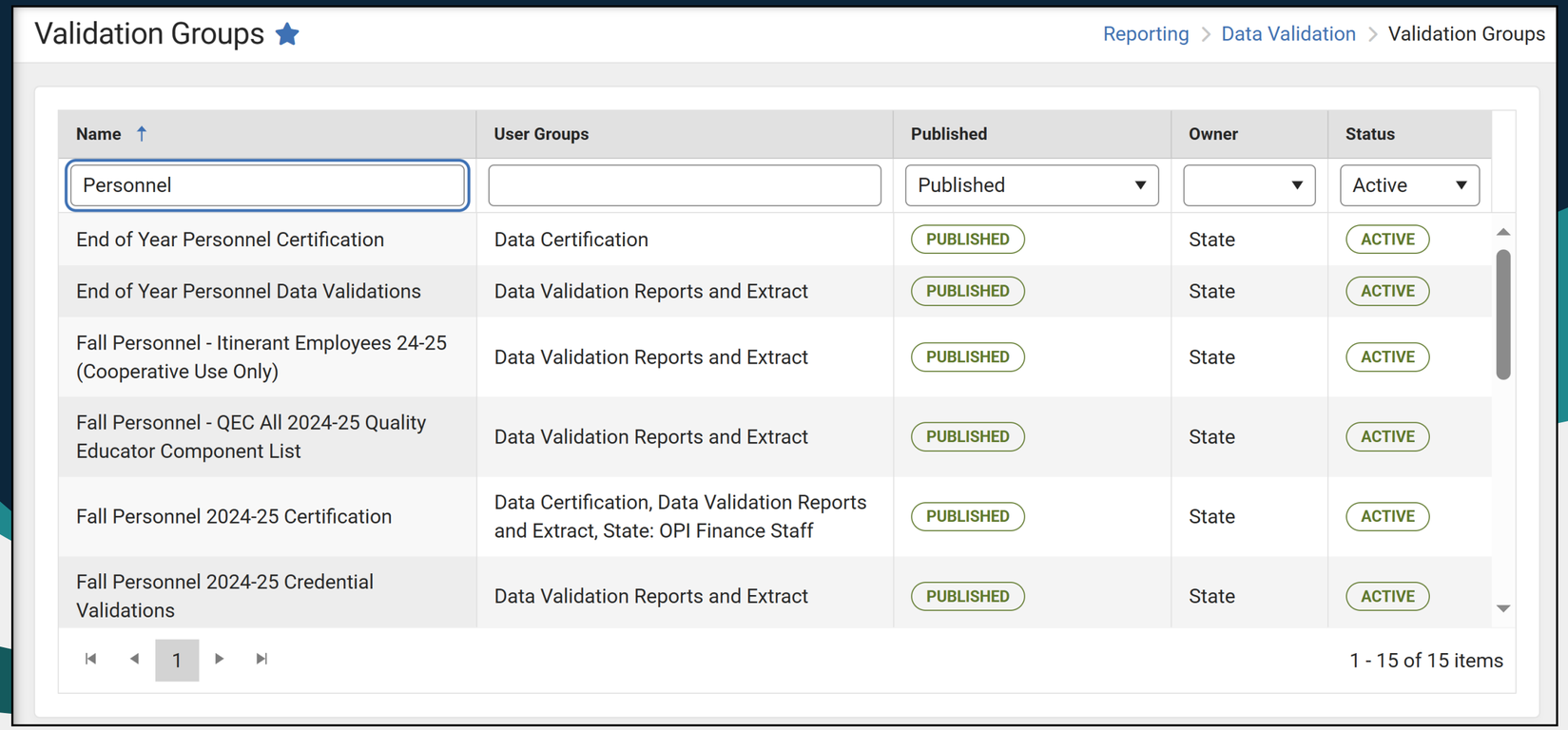
- The duties of the individual
- The Legal Entity/Entities from which the staff member is being paid
- The requirements for Accreditation

Review these considerations prior to Fall Personnel Reporting – changes should not be made to accommodate current collections

Infinite Campus Reports

Path: Reporting>Data Validation>Validation Groups or Validation Reports

Run reports by collection or use End of Year for “full-year” reporting



Infinite Campus Reports

Common Validation Errors

- Missing SEID (Staff State ID) – use TMT to generate SEID
- Missing District Assignment
- Missing FTE – review Matrix to determine which State Assignment Codes require FTE
- Assignments that have FTE where FTE is not required – remove FTE from Assignments that do not require it
- Contractors and SPED Cooperative Staff with FTE – FTE should not be entered if a staff member is identified as a Contractor or SPED Cooperative Staff
- District Assignment not school level – certain State Assignment Codes require assignment to a school (District Level not allowed)
- Expired/Missing Credentials – ensure that Credentials are entered where Staff State ID requires it and update DLI Credential License Expiration Dates

MASBO 2025 NAVIGATING CHANGE

Infinite Campus Reports

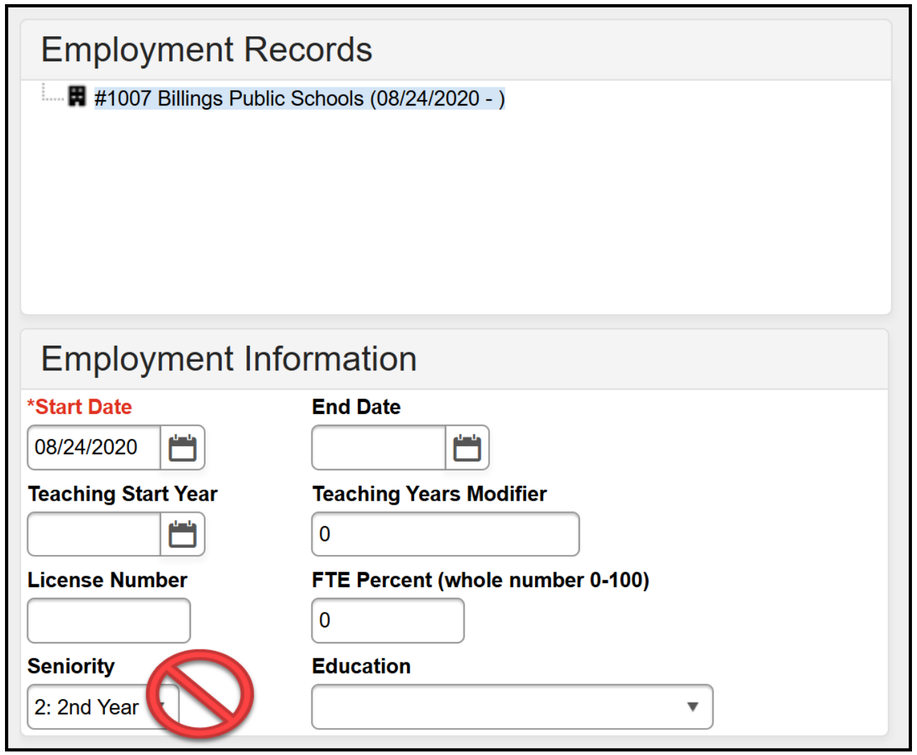
QEC Reports

QEC reports are based on the Fall Count Date.***Assignment to a QEC eligible position is no guarantee that a district will receive a QEC payment***

- Educators must have a valid license issued by 12/1 in the current school year
- DLI licensed professionals must have a License Issue Date effective on the Fall Count Date
- Emergency authorized staff must have a license issued by 12/1 in the current school year and not have an emergency license for more than 3 years in the same Legal Entity (LE)
- Staff State ID must match the SEID in TMT
- DLI Credentials must be properly entered (verify Issue Date, End Date (License Expiration Date) and License Number)

New For 2025 -26

Teacher Incentive reporting no longer reported in Infinite Campus:



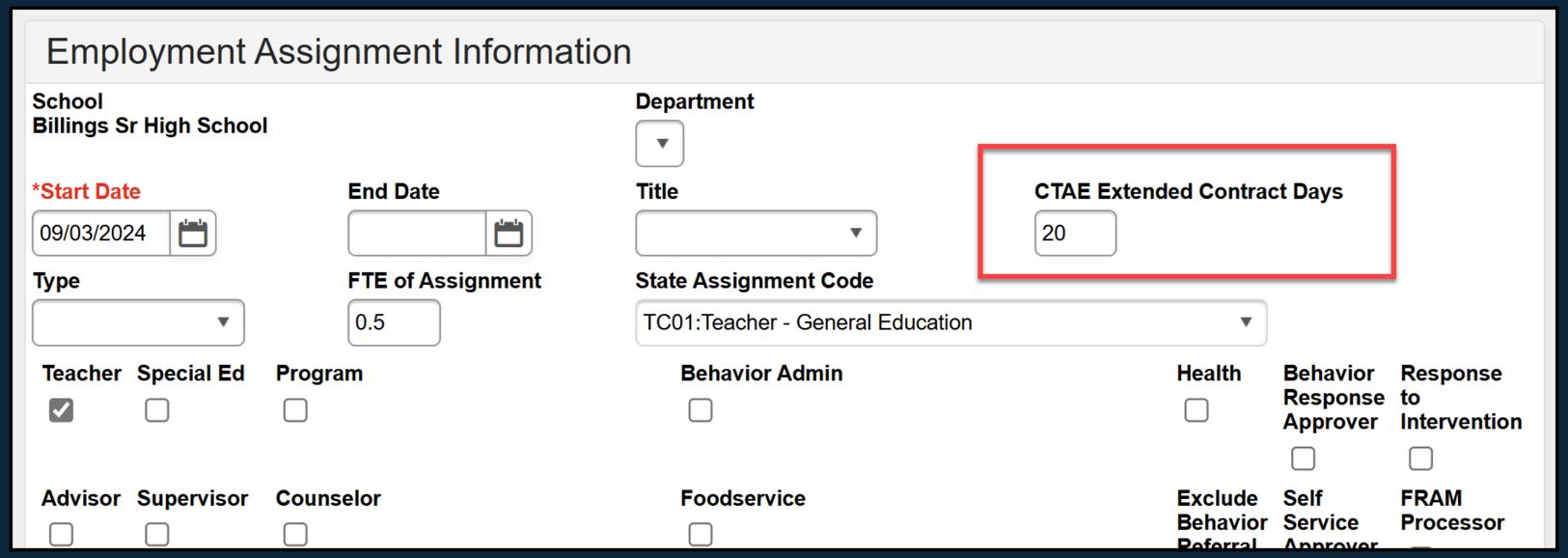
Instructions for Teacher Incentive are in MAEFAIRS:

TEACHER INCENTIVE

New for 2025 -26

CTAE Extended Contract Days

Extended Contract Days are a component for CTE allocations



MASBO 2025 NAVIGATING CHANGE

THANK YOU!

Nicole Thuotte
EDUCATE Unit Manager
(406) 444-2080
(406) 202-1759
nthuotte@mt.gov

This presentation is intended solely for use by the Montana Association of School Business Officials (MASBO) and its authorized recipients. The views expressed herein are those of the individual presenter and do not necessarily represent MASBO. The information provided is for informational purposes only and does not constitute legal or financial advice. MASBO assumes no responsibility for the accuracy or completeness of the content presented. While every effort is made to ensure accuracy, no warranties, express or implied, are made regarding the content. Please consult your District's legal counsel before acting on any information presented.