

Fall State Reporting Survival Series

OPI and School Services of MT



Introduction

Start your journey by charting key dates and navigating enrollment changes without getting lost in the weeds.

Agenda: Mapping the Terrain

Calendars

Summer Enrollments &

Transfers

Validations





Calendars

A plethora of examples to choose from

SCHOOL YEAR SETUP

- Label
- Start Year
- End Year
- Instructional Minutes:
 - Only mark Exclude non-instructional Periods and non-instructional minutes
 - **DO NOT MARK Exclude time gaps**
- School Day Minutes:
 - Only mark Exclude non-instructional periods

School Year Detail

*Label

25-26

*Start Year

2025

Start Date

07/01/2025

Active

☒

*End Year

2026

End Date

06/30/2026

School Year

Load Preference From Previous Year

Reset Default Preference

Instructional Minutes Preference

☒

Exclude non-instructional periods

☒

Exclude non-instructional minutes

☐

Exclude time gaps between periods

Max non-instructional minutes for period

School Day Minutes Preference

☒

Exclude non-instructional periods

☐

Exclude non-instructional minutes

☐

Exclude time gaps between periods

Max non-instructional minutes for day

Calendar Information

- Name
- Start Date
- End Date
- Student Day (Instructional minutes)
- Teacher Day (minutes)
- Whole Day Absence (minutes)
- Half Day Absence (minutes)
- Type
- Food Service Edit Check
- Days per Week

Calendar Information

Calendar Info

Calendar ID	School (schoolID:)	Sequence
*Name	Number	
*Start Date	*End Date	Summer School
Student Day (instructional minutes)	Teacher Day (minutes)	Exclude
Whole Day Absence (minutes)	Half Day Absence (minutes)	School Choice
Type	External LMS Exclude	
I: Instructional		
A: Alternative		
B: Homebound		
F: Offsite		
H: Homeschool		
I: Instructional		
J: Jumpstart		
O: Other		

- Instructional - Primary
- Other - Extracurricular
- Offsite - Colony

Calendar Information

Calendar Info

Calendar ID

*Name

*Start Date

Student Day (instructional minutes)

Whole Day Absence (minutes)

Type
I: Instructional

Require Student Assignment

Ignore Master Push

Testing Count Date

Comments

Food Service Edit Check
(default to blank - no override)

Days Per Week

Traditional 5-day week

Full 4-day week

Modified 4-day week (some Fridays)

Other (Preschool/Kindergarten/SPED Only)

- Food Service Edit Check – Leave as Default to Blank
- Days Per Week – Requirement for Calendar Validation and Certification

Grade Level Setup ☆

New
 Save
 Delete

Grade Level Editor

Name	Seq
09	10
10	11
11	12
12	13

Grade Level Detail

Name (locked)

*Sequence Number

*State Grade Level Code
 ▼

Standard Day

Maximum Membership Days

Whole Day Absence (minutes)

Half Day Absence (minutes)

Maximum Approved School Ch

Grade Level Setup

- Review nomenclature
- If sequencing is off between calendars, partner with EDUCATE or SSoM to fix
- Drives data for accreditation and student enrollment

Quarters



Term Detail

	*Name	*Sequence	*Start Date		*End Date
X	Q1	1	09/02/2025		11/06/2025
X	Q2	2	11/10/2025		01/2'
X	Q3	3	02/02/2026		

Term Setup

- Student start and end dates
- No gaps between terms
- Drives grading periods and course minute validations

1				
2	2	2	2	2
3	3	3	3	3
4	4	4	4	4
Lunch	Lunch	Lunch	Lunch	Lunch
5	5	5	5	5
6	6	6	6	6
Activity	Activity	Activity	Activity	Activity

Period Schedules

PeriodSchedule Info			
*Name	*Sequence	Exception/Day	School Day
M	1	<input type="checkbox"/>	435 465

Period Info							
	*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
✕	1	1	07:50 AM	08:59 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	2	2	08:59 AM	10:09 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	3	3	10:09 AM	11:18 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	4	4	11:18 AM	12:28 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	Lunch	5	12:28 PM	12:58 PM	30	<input type="checkbox"/>	<input type="checkbox"/>
✕			12:58 PM	02:25 PM	0	<input type="checkbox"/>	<input type="checkbox"/>

Drives all reporting wild

Can you spot the error?

PeriodSchedule Info						
*Name	*Sequence	Exception/Special	Instructional	School		
Day	Minutes	Day				
MTWTR	1	<input type="checkbox"/>	1168	1208		

Period Info						
*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
X 1	1	08:15 AM	09:09 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 2	2	09:13 AM	10:07 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 3	3	10:11 AM	11:05 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 4	4	11:09 AM	12:03 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
X LUNCH	5	12:03 PM	12:46 PM	40	<input type="checkbox"/>	<input type="checkbox"/>
X 5	6	12:50 AM	01:44 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 6	7	01:48 PM	02:42 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 7	8	02:46 PM	03:40 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
X Activity	10	03:45 PM	06:00 PM	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add Period

Instructional Minutes Preference for 25-26 School Year



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Elementary Example #1

PeriodSchedule Info						
*Name	*Sequence	Exception/Special	Instructional	School		
		Day	Minutes	Day		
Daily	1	<input type="checkbox"/>	390	420		

Period Info							
	*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
X	AM	1	08:00 AM	11:30 AM	15	<input type="checkbox"/>	<input type="checkbox"/>
X	PM	2	11:30 AM	03:00 PM	15	<input type="checkbox"/>	<input type="checkbox"/>
X	READ	3			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	MATH	4			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	SCI	5			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	SOC	6			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	MUSIC	7			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	PE	8			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X	ART	9			0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Instructional Minutes Preference for 25-26 School Year



Elementary Example #2



Period Schedule Info						
*Name	*Sequence	Exception/Special Day	Instructional Minutes	School Day		
Main	1	<input type="checkbox"/>	330	420		

Period Info						
*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
X Homeroom	1	08:15 AM	03:15 PM	90	<input type="checkbox"/>	<input type="checkbox"/>
X C	2	08:15 AM	03:15 PM	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add Period



Period Schedule Info				
*Name	*Sequence	Exception/Special Day	Instructional Minutes	School Day
Daily	1	<input type="checkbox"/>	425	465

Period Info							
*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive	
X 1	1	08:00 AM	09:00 AM	0	<input type="checkbox"/>	<input type="checkbox"/>	
X 2	2	09:04 AM	09:54 AM	0	<input type="checkbox"/>	<input type="checkbox"/>	
X 3	3	09:58 AM	10:48 AM	0	<input type="checkbox"/>	<input type="checkbox"/>	
X 4	4	10:52 AM	12:28 PM	40	<input type="checkbox"/>	<input type="checkbox"/>	
X HR	5	12:32 PM	01:03 PM	0	<input type="checkbox"/>	<input type="checkbox"/>	
X 5	6	01:07 PM	01:57 PM	0	<input type="checkbox"/>	<input type="checkbox"/>	
X 6	8	02:01 PM	02:51 PM	0	<input type="checkbox"/>	<input type="checkbox"/>	
X 7	9	02:55 PM	03:45 PM	0	<input type="checkbox"/>	<input type="checkbox"/>	

Add Period

15

Middle School Example #1



Middle School Example #2

PeriodSchedule Info					
*Name	*Sequence	Exception/Special Day	Instructional Minutes	School Day	
MTTH	1	<input type="checkbox"/>	415	445	

Period Info							
	*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
X	1	1	08:10 AM	09:01 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X	2	2	09:05 AM	09:56 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X	3	3	10:00 AM	10:51 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X	4	4	10:55 AM	11:46 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X	Advisory	5	11:50 AM	12:20 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
X	Lunch	6	12:20 PM	12:50 PM	30	<input type="checkbox"/>	<input type="checkbox"/>
X	5	7	12:54 PM	01:45 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
X	6	8	01:49 PM	02:40 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
X	7	9	02:44 PM	03:35 PM	0	<input type="checkbox"/>	<input type="checkbox"/>

Add Period

Instructional Minutes Preference for 25-26 School Year



High School Example

PeriodSchedule Info

*Name

MTTH

*Sequence

1

Exception/Special

Day

☐

Instructional

Minutes

415

School

Day

445

Period Info

	*Name	*Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
✕	1	1	08:10 AM	09:01 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	2	2	09:05 AM	09:56 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	3	3	10:00 AM	10:51 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	4	4	10:55 AM	11:46 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	Advisory	5	11:50 AM	12:20 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	Lunch	6	12:20 PM	12:50 PM	30	<input type="checkbox"/>	<input type="checkbox"/>
✕	5	7	12:54 PM	01:45 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	6	8	01:49 PM	02:40 PM	0	<input type="checkbox"/>	<input type="checkbox"/>
✕	7	9	02:44 PM	03:35 PM	0	<input type="checkbox"/>	<input type="checkbox"/>

Add Period

Instructional Minutes Preference for 25-26 School Year



Day Setup – ONLY use prior to school starting

Day Setup ☆

Auto Create Calendar Days

Day Reset

This tool will generate a Day record for each day in the Calendar. If your calendar dates are year-round, or larger than the days you need to track, enter a smaller date range to only create Day records for days that have instructional meaning for this Schedule Structure. If this function is performed on an existing calendar, all days and day events will be lost outside the range you choose (Unless you choose 'Fill Missing Days Only').

***Start Date**
07/01/2025

***End Date**
06/30/2026

Duration
0

Fill Missing Days Only
☒

Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Create Days

First and last day of school



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<<

October 2025

Sun	Mon	Tue	Wed	Thu
			01 Regular Schedule	02 Regular Schedule
05	06 Early Out	07 Regular Schedule	08 Regular Schedule	09 Regular Schedule
12	13 Early Out	14 Regular Schedule	15 Regular Schedule	16
19	20 Early Out	21 Regular Schedule	22 Regular Schedule	23 Regular Schedule
26	27 Early Out	28 Regular Schedule	29 Regular Schedule	30 Regular Schedule



Days Example – Assign
Period Schedules to Days

Day Rotations for courses that don't meet every day

Day Setup ☆ Scheduling &

🔍 Day Reset

🔍 Day Rotation

🖨️ Print

🖨️ Print Rotation

➕ Multi Day Event

🔍 MT Calendar Report

<< **September 2025** >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	01	02 Regular B	03 Regular A	04 Regular B	05 Regular A	06
07	08 Monday Release B	09 Regular A	10 Regular B	11 Regular A	12 Regular B	13
14	15 Monday Release A	16 Regular B	17 Regular A	18 Regular B	19 Regular A	20
21	22 Monday Release B	23 Regular A	24 Regular B	25 Regular A	26 Regular B	27
28	29 Monday Release A	30 Regular B				

▼ Event on this Day



- Minimum of three
- Maximum of seven
- Includes professional development, teacher convention, parent-teacher conferences

*Pupil
Instruction
Days*

Setting up PIR days correctly

Day Detail		
Date	Day #	
10/16/2025	Not an instructional day.	
*Period Schedule		
Regular B		
School Day	Instruction	Attendance
<input checked="" type="checkbox"/> A	<input type="checkbox"/>	<input type="checkbox"/>
Start Time	End Time	Duration
		0
Comments		
Day Events		
Type	Duration Inst. Minutes	
<input checked="" type="checkbox"/> B IS: In Service	360	0
Add DayEvent		
Blended Learning Groups ?		
Add Group		



Setting up PIR days correctly

Example: Students in class

Day Detail		
Date	Day #	
11/06/2023	30	
*Period Schedule		
Early Out ▼		
School Day	Instruction	Attendance
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Start Time	End Time	Duration
		0
Comments		
<div></div>		
Day Events		
Type	Duration	Inst. Minutes
<input checked="" type="checkbox"/> PT: Parent-Teacher Conference ▼	370	0
Add DayEvent		
Blended Learning Groups ?		
Add Group		



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*"Whatever you
do, always give
100%. Unless
you're donating
blood."*

Bill Murray



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A collage of travel-related items including a map, a smartphone showing a compass and temperature, and a camera lens.

Summer Transfers

- Students entering grades 7-12 require documentation to verify transfer to another K-12 educational program
- High school districts are responsible for 8th grade students expected to enroll in high school (from feeder districts)

Summer Transfers

Verification of Student Transfer

- Delete the 25-26 enrollment
- Change the End Status for 2024-25

Enrollment Status Unknown

- Keep the student enrolled in accordance with district policy (minimum 1-day enrollment)
- Mark the student absent for the duration of enrollment
- If status becomes known, delete the 25-26 enrollment and change the End Status for 24-25

Accurate Start and End Status Codes

- Moving from one school to another (same level) - End Status 120: Transfer to another school in the same district, Start Status 04: Transfer from public school in district or state
- Moving from one school to another (different level) - End Status 110: Promoted to another school in district, Start Status 04: Transfer from public school in district or state



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Accurate Start and End Status Codes

- Use 01: First time enrolled ONLY for PK, KG, sometime grade 1 – if a student has never attended any type of school (private pre-school or day care not included)
- Use 03: Re-entry to the same school after withdrawal ONLY for students who leave and do not attend any other type of school in their absence, then return to school

Not all who
wander are lost.

J.R.R. Tolkien

“ quote fancy



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Did you know?!?!

Custom Start and End Status Codes

- Create descriptive Start and End Status Codes
- Map to State Start and End Status Codes

Student Information>General Student Administration>Enrollment Start Status Setup (or Enrollment End Status Setup)

Enrollment Status Unknown

- Keep the student enrolled in accordance with district policy (minimum 1-day enrollment)
- Mark the student absent for the duration of enrollment
- If status becomes known, delete the 25-26 enrollment and change the End Status for 24-25

Enrollment Start Status Setup ☆

Student

 New  Save Active ▾

Start Status Type Editor				
Default	Code	Name	Start School Year	End School Year
	01	First time receiving educational services	93-94	
	02	Continued enrollment same school, no interruption	93-94	
	03	Re-entry to the same school after withdrawal	93-94	
	04	Transfer from public school in district or state	93-94	
	06	Transfer from an out of state school	93-94	
	06A	Transfer from an out of state school (Idaho)	25-26	
	06B	Transfer from another school in district (Washington)	25-26	
	07	Transfer from a school from out of the country	93-94	
	07A	Transfer from a school from out of the country (Foreign Exchange)	25-26	
	08	Transfer from a private school within the state	02-04	

Start Status Type Detail	
*Start School Year	End School Year
25-26 ▾	▾
*Code	*Name
04A	Transfer from public school in district or state (tuition)
*State Start Status Code (Mapping)	Default
04: Transfer from public school in district c ▾	<input type="checkbox"/>

Customize Start and End Statuses

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RECORDS TRANSFER

- Use the Data Imports – import:
 - Transcripts*
 - Enrollments
 - Assessments
 - Immunizations/Health Conditions
 - IEPs
 - SPED Documents
- **Transcript Import Wizard will only show if the student has a transcript and is coming from an Infinite Campus District Edition School*

None.

Status: Records released.

Transfer Documents		Data imports
Transcript	Q1 Report Card	Transcript Import Wizard
Census Contact Summary	Q2 Report Card	Extended Census Import Wizard
Extended Census Summary	Q3 Report Card	Enrollment History Import Wizard
Enrollment History	Q4/EOY Report Card	Assessment Import Wizard
Schedule	IEP	Immunization Import Wizard
Attendance Period Detail	MT Supplemental	Health Condition Import Wizard
Assessment Summary	Special Ed Evaluation	Health Screening Import Wizard
Behavior Summary	Special Ed Documents	IEP Import Wizard
FERPA	PLP	MT Supplemental Documents Import Wizard
Gifted Service	PLP Documents	Special Ed Evaluation Import Wizard
Gifted	Health Documents	DE Meeting Invite Import Wizard
Health Condition Summary	Counseling Documents	Special Ed Documents Import Wizard
Health Screening Summary	English Learners (EL)	PLP Import Wizard
Health Immunization Summary	EL Services	PLP Documents Import Wizard
Homeless Service Summary	EL Accommodations	Health Documents Import Wizard
CTE Participant Record Summary	Adult Ed	Counseling Documents Import Wizard
Instruction Mode	Early Learning	MT State Reporting Import Wizard
Section 504	Foster Care	English Learners (EL) Import Wizard
Plan Of Study	BIE Foster Care	
Preschool	Migrant	
	Migrant Service	

MT State Reporting Import

- Review the data
- Don't click save. For informative purposes ONLY.

Student Records Transfer - MT State Reporting Import

Import MT State Reporting record from
Select which transferred data from the releasing district should be imported into your own local database. If imported, this data will be used for reporting purposes only.

CAUTION:
Previous year's state reporting data will be copied into the current year enrollment record if the student does not have a current record.

Enrollment State Reporting Elements

ENROLLMENT DETAILS
'State Exclude' cannot be marked if either 'Extracurricular Activities Only' or 'Home-Based Early Literacy' are marked. Only non-public students should be marked as 'Extracurricular Activities Only' or 'Home-Based Early Literacy'. If 'Extracurricular Activities Only' box is checked, no other enrollment tab data is needed EXCEPT End of Year Number of 6+ and Number of 18+ weeks activities completed.

Enrollment Exceptions

State Exclude ☐ Extracurricular Activities Only ☐

Home-Based Early Intervention ☐

Serving and Resident Instruction Identification

Serving School Resident School

Military Connected Status
Student is a dependent of a member of:

TITLE 1
Title I Targeted Assistance Program

Title I ☒

Title I Instructional Services

☐ Reading Lang Arts ☐ Social Sciences
☒ Math ☐ Vocational/Career
☐ Science ☐ Other

Title I Support Services

☐ Health, Dental and Eye Care
☐ Guidance/Advocacy
☐ Other

Title I - Other

Title I Part A Neglected ☐ Title I Part D Delinquent and served by:

OTHER PROGRAM PARTICIPATION

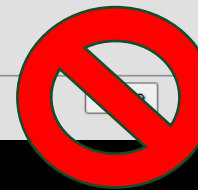
Immigrant ☐ Date Immigrant Entered US School

21st Century Participant ☐ Foreign Exchange ☐

Homeless ☐ Homeless Night Time Residence Unaccompanied Youth ☐

OPTIONAL

Sort By



IEP IMPORT

- Do NOT mark Import as .PDF only
- Please check the box to import LOCKED IEPs

DO NOT MARK ME!

Import as PDF only

IEP Plan Import

*Plan Type: MT IEP 06/09/2025 - 10/10/2025
MT IEP (Type Match) ▼

Start Date: 06/09/2025 End Date: 10/10/2025 Locked ☐

IEP Services Import

☐ Do not import the following service.

*Service: Reading
Reading ▼
Service Provider: ▼
Service Position: Special Educ Teacher Display on Print ☐

☐ Do not import the following service.

*Service: Math
Math ▼
Service Provider: ▼
Service Position: Special Educ Teacher Display on Print ☐

☐ Do not import the following service.

*Service: Self-Help/Independence
Self-Help/Independence ▼
Service Provider: ▼
Service Position: Special Educ Teacher Display on Print ☐

☐ Do not import the following service.

*Service: Social/Emotional/Behavioral
Social/Emotional/Behavioral ▼
Service Provider: ▼
Service Position: Special Educ Teacher Display on Print ☐

Back Next

MARK ME!

Data Validations – Reach the Peak

Use Data Validations to check your work

- Informational – Take a look
- Warnings – Double check
- Errors – Uh oh!



VALIDATIONS

Calendar Validations & Information

- Aggregate hours by school
- Term dates by school
- Instructional Days and Minutes
- Calendar Period Minutes by Period (High School)
- Lunch times
- PIR and PTC Days
- Days/Week

Enrollment Validations

Before Fall Enrollment validations are available, use End of Year Enrollment Validation

- Missing Federal Race Ethnicity
- More than one identity – same effective date
- Enrollment count of students by school
- Enrollment count of students by race ethnicity

Enrollment Overlap Reports

State Enrollment Overlap Reports: Students simultaneously enrolled in 2 or more schools on the same date

- Enrollment Overlap Report: ONLY lists overlaps WITHIN the district.

Pay careful attention to the options when reviewing these reports.

HOMEWORK

Before next Friday's call –

- Review calendar setup for all schools
- Run the data validations reporting for Calendar Validations and Information, Enrollment, and Overlaps
- Review Records Transfers for all incoming students
- Review Start and End Status codes for accuracy



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Thank you

Mary Anne Skinner,
Director of Technology,
School Services of MT
&
Nicole Thuotte,
EDUCATE Unit Manager,
MT Office of Public Instruction



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