Fall State Reporting Survival Series

OPI and School Services of MT

Introduction

From staffing setups to cracking the QEC code, this session is all about establishing a solid basecamp.

School Services of **MONTANA**

Agenda: Packing the Essentials

Staffing

QEC

Staffing

Elementary, MS, and High School

School Services of Montana

Personnel

Why?

- Streamline data source – one system
- Allows for staff to be assigned to districts, schools, students & courses
  - Talks to:
    - Accreditation
    - SPED
    - CTE
    - School Finance
    - QEC
- Ties to other State required reporting within Campus – Teacher/Class, etc.

What?

- Employment Dates
- District Assignments
- FTE
- State Assignment Codes
- SPED Level
- Specialization
- Supervisors
- Credentialing

Who?

- Teachers
- Admin
- Admin Assts
- SPED Service Providers
- Paraprofessionals
- Subs
- Short-term and LT workers
- Food Services Staff
- Bus Drivers
- Coaches
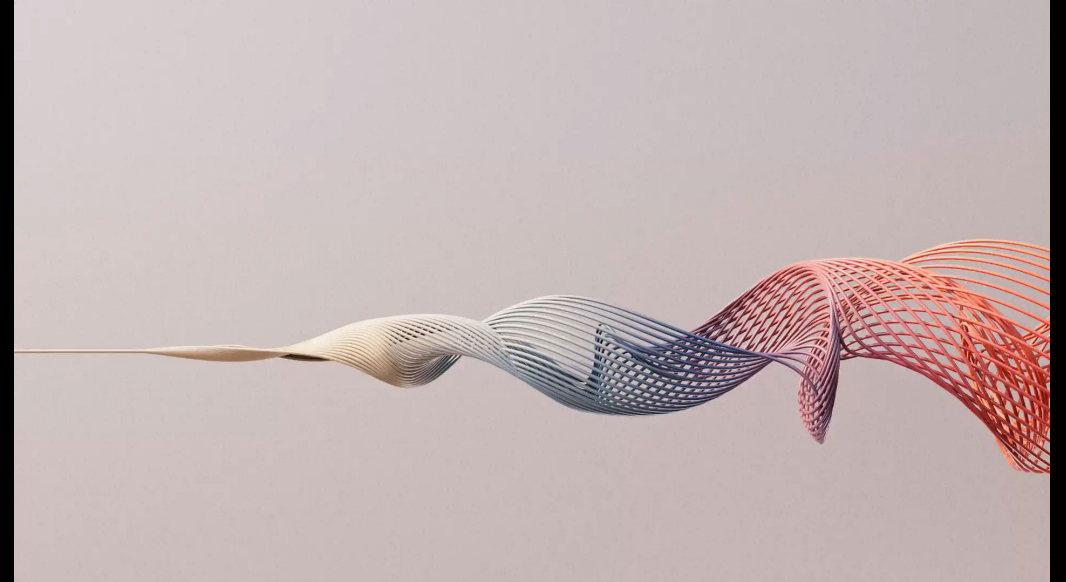
School Services of MONTANA

THE MATRIX

State Assignment Code Matrix – Outlines the position codes used for identifying the role of district employees

- Position Codes
- Descriptions!
- QEC Eligibility
- FTE
- AND MORE!!!

https://opi.mt.gov/Leadership/Data-Reporting/EDUCATE-Infinite-Campus#10765913129-personnel-reporting

Position Codes

Based on the role of the staff member within the district.

Used for:
- Eligibility for QEC
- FTE
- SPED

What are Position Codes?
- AD – Admin
- DS – District Staff
- PC – Program Coordinator
- PP - Paraprofessional
- RT – Retired… the mythical goal of all
- SE – SPED
- SP – Specialized Personnel
- TC – Teacher

Some codes hang out 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 EC Staff

Position Codes

New Position Codes for 25-26

AD 99 County Superintendent: Used for County Superintendents who are in Infinite Campus for purposes of assignment to roles (Homeless Liaison, Title IX Coordinator, Foster Care Point of Contact, etc.)

PC10 Advanced Opportunities Facilitator: No TMT or DLI license required

DS07 District Clerk: Only for district clerks who meet the requirements of 20-3-325, MCA (code other business office staff as DS01 and cooperative clerks as SE24)

SE11 Audiologist Assistant: Requires DLI license

SE 75 Speech-Language Pathology Assistant: Requires DLI License

SE 16 Interpreter: Must meet qualifications in ARM 10.55.718 (EIPA assessment and 12 hours of annual professional development) - verify qualifications with School Finance

Position Codes

New Position Codes for 25-26

SP70 Dietician-Nutritionist: Requires DLI license

SE12 Audiologist Aide: Qualifications determined by the Board of Public Education (cannot be licensed by DLI)

SE73: Speech-Language Pathology Aide: Qualifications determined by the Board of Public Education (cannot be licensed by DLI)

District Level Assignments

What do these codes mean?!?!?!?!

- 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/HS/K-12 code to report staff who are assigned by district instead of school.

District Level EL/HS is only available in districts with more than one school at this level.

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.

SCHOOL SERVICES OF
MONTANA

Staff in Infinite Campus

Tips for Creating Staff in Infinite Campus:

1. Always use the Staff Locator to create any person other than a student (use Student Locator for students)
2. Ensure that the SEID is entered correctly (birthdate is recommended but not required).
3. Check FTE – match to requirements for accreditation and HR system
4. Choose appropriate State Assignment Code (based on position, not licensure)
5. Add appropriate MT Titles (Coordinators, Contractors, Consortium Providers, SPED Cooperative Staff, Not State Reported)
6. Don't forget the "extras" (checkboxes, SPED level, Supervisor)
7. What about Title?

SCHOOL SERVICES OF MONTANA

Staff in Infinite Campus

Credentials – Highly Qualified

Special Education staff (teachers, paras), paraprofessionals, related service providers (speech, OT, PT, etc.), and other professional staff (nurses, counselors) require a Credential record

Highly Qualified (required for Special Education staff and paraprofessionals):
- Click New and select HQ: Highly Qualifed
- Enter Start Date (start of employment or start of status)
- Select appropriate qualifications
  - Paraprofessional – choose appropriate Paraprofessional Qualification
  - Special Education staff – choose Subject Type SPED: Special Education Content and appropriate Certification Status

If a status changes, enter a new record with the Start Date reflecting the effective date of the new credential

SCHOOL SERVICES OF
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Credentials – Paraprofessional

New Employment Credential Information

*Start Date
08/28/2024
End Date

Subject Type

Met HOUSSE   HOUSSE Completion Date

Subject Matter Competency

Paraprofessional Qualification

A:Associates Degree

AA:Academic Assessment

HE:Two or More Years of Higher Education

LT:Licensed Teacher

NA:None of These Apply

Instructional Paraprofessional

New Employment Credential Information

*Start Date
08/28/2024
End Date

Subject Type
SPED: Special Education Content

Met HOUSSE   HOUSSE Completion Date

Subject Matter Competency

*Certification Status

ACA: Academic Assessment

HE: Two or more years of Higher Education

LT: Licensed Teacher

NONE: None of These Apply

Special Ed Paraprofessional

Staff in Infinite Campus

Licensure

Special Education staff (teachers, paras), related service providers (speech, OT, PT, etc.), and other professional staff (nurses, counselors) require a Credential record

Licensure/Certification (required for related service providers and other professional staff)

- Click New and select LC: Licensure/Certification
- Start Date = License issue date; End Date = License Expiration Date
- Select SPED Related Services Credential OR Health License
- Enter License number in exactly the same format as found on the Department of Labor website (example: SLP-AU-LIC-1234)

Only update the End Date field when a license is renewed – a new record is not required

School Services of MONTANA

Credentials - Professional

Staff in Infinite Campus

Full-Time Equivalent (FTE)

- Can staff be more than 1 FTE?

- Can staff be reported in more than 1 district? For more than 1 FTE?

- Can districts "share" staff?

Staff in Infinite Campus

Shared Resources

The concept of "shared resource incentive" was part of the STARS Act (2025)

If two or more school districts, or three or more school districts when one district is either an elementary or high school district of a unified school system, cooperate to jointly employ an individual who qualifies as a quality educator or qualified staff under 20-9-327, with each district employing the individual as no less than a 0.33 full-time equivalent employee, that employee must be counted as a 1.0 full-time equivalent employee for the purposes of calculating the total quality educator and qualified staff payment provided in 20-9306 for each district participating in the joint employment of the individual.

Joint employment for school districts qualifies is met if the districts employ the individual directly or through the terms of a multidistrict agreement as provided in 20-3-363.

Staff in Infinite Campus

Shared Resources

For the 25-26 school year, districts must:

1. Enter the actual FTE in the staff member's District Assignment

2. If the shared resource is a QEC position, contact School Finance to request an adjustment to QEC

3. In future years, the shared staff will be identified in the District Assignment > MT Titles

SCHOOL SERVICES OF MONTANA

Contractors

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

- Special Education Related Service Providers
- Teachers
- Nurses
- Dual Credit Instructors (**New for 25-26)

Note: Not required to report contracted services (e.g., bus companies and their employees). NO FTE.

These individuals are not paid through payroll
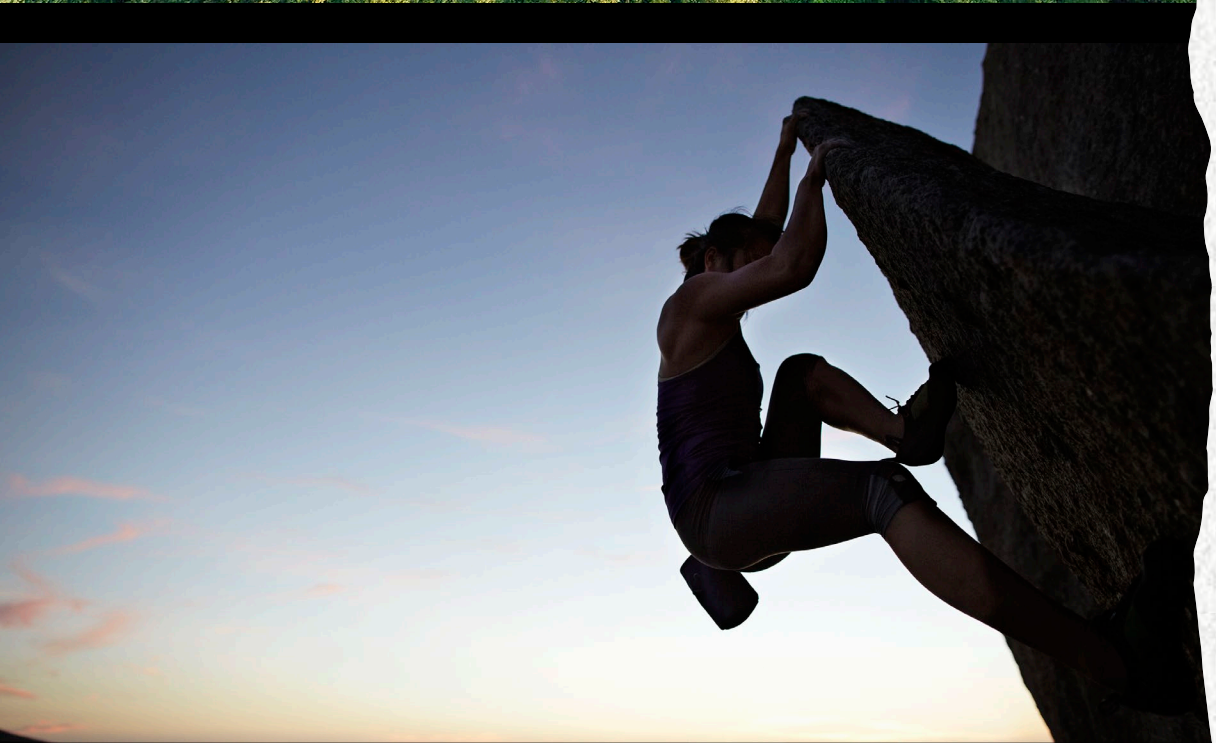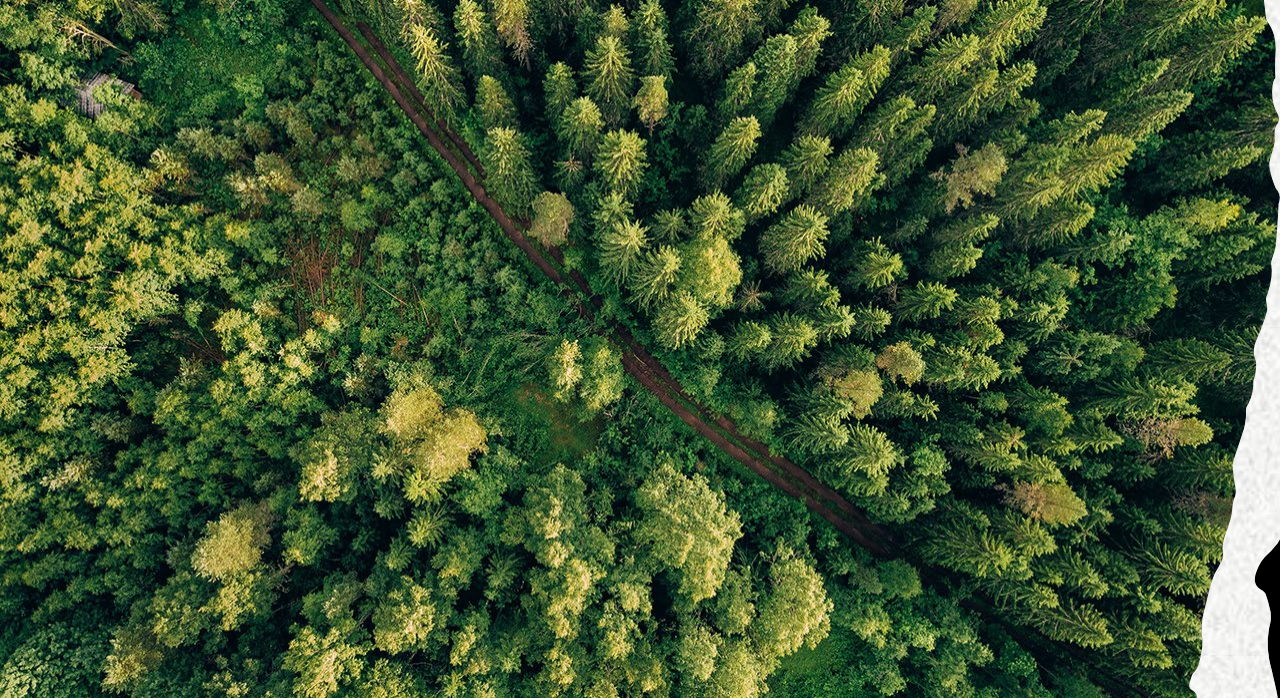
Contractors

- Identify Contractors using the MT Titles field in the District Assignment

- Check the "Special Ed" checkbox

- Use the Special Ed Service Providers Setup tool to identify the contractor's "Agency" (if self-employed, enter the staff member's first and last name)

- For Dual Credit Instructors, enter the College/University awarding credit

School Services of MONTANA

Consortium Provider

Consortium v. Contractors

- A consortium is an organization contracted to provide a service required by Accreditation (Library, Curriculum, Counseling)

- A contractor is an individual contracted to provide any required service for a Montana school district (applies to any State Assignment code)

- Differentiate between Consortium and Contractor in the MT Titles field of the District Assignment (this is the one exception to the "create new District Assignment" rule!)

- Data review required for all districts utilizing a Consortium

Contractors

- Navigate to Census > Staff > Staff Locator Wizard
- Enter appropriate dates and State Assignment Code
- Mark Special Ed checkbox
- MT Title = Contractor
- Navigate to Student Information > SPED Admin > Special Ed Service Provider Setup
  - This will require a calendar to be selected that matches the District Assignment
- Click New
- Link to Person
- Enter in Agency Information at a minimum

School Services of MONTANA

Consortium

- Navigate to Census > Staff > Staff Locator Wizard
- Enter appropriate dates and State Assignment Code
- Mark Special Ed checkbox
- MT Title = Consortium
- Navigate to Student Information > SPED Admin > Special Ed Service Provider Setup
    - This will require a calendar to be selected that matches the District Assignment
- Click New
- Link to Person
- Enter in Agency Information at a minimum

School Services of Montana

NEW to 25-26 Extended Contract Dates – CTE ONLY

Employment Assignment Information

School
Harrison High

Department
Science ▼

*Start Date
11/25/2019 📅

End Date
📅

Title
▼

CTAE Extended Contract Days
0

Type
02:Certified ▼

FTE of Assignment
1

State Assignment Code
AD10:Program Coordinator (Incl. Evaluation Duties) ▼

Teacher   Special Ed   Program   Behavior Admin   Health   Behav

District Assignment Changes

When in doubt, create a NEW District Assignment
E.G.

- **Paraprofessional changing to Teacher**
- **Moving from .75 FTE to 1 FTE**
- **Changing from Elementary to Middle School**
- **Changing Departments from Science to Math**
- **Promotion from Teacher to Lead Teacher**
- **Change in Supervisors**

DO NOT CHANGE FTE in the existing District Assignment

DO NOT CHANGE the State Code in the existing District Assignment

DO NOT DELETE DISTRICT ASSIGNMENTS

SCHOOL SERVICES OF MONTANA

Quality Educator Component (QEC)

Staff are eligible for QEC if they are employed in a QEC position and assigned to a QEC eligible position

Individual eligibility depends on these factors:
- Educator properly licensed and endorsed by Dec. 1st
- Emergency authorized educator licensed by Dec. 1st (for no more than 3 years)
- Professional Licensure active on Count Date

Note: An educator listed on a QEC validation report in Infinite Campus is not a guarantee that the individual will be included in the district's QEC payment

School Services of MONTANA

"People often say motivation doesn't last. Well neither does bathing – that's why it's recommended daily."

Zig Zigler

SCHOOL SERVICES OF
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Data Validations – Reach the Peak

Use Data Validations to check your work

- Informational – Take a look

- Warnings – Double check

- Errors – Uh oh!

School Services of MONTANA

Infinite Campus Validations

- <u>Fall Personnel 2025-26 District Assignment Validations</u>
  - Missing SEID
  - Missing State Assignment Code
  - Missing District Employment
  - Missing FTE
  - FTE > 1 (single Assignment)
  - FTE > 1 (sum of Assignments)
  - District Assignment with FTE that Should Not Have FTE
  - Assignment Not School Level
  - CTE Extended Contract, Not Teacher
  - Extra Duty, No Other Assignment
  - 3 Checkbox Validations
  - Missing SPED Level
  - Missing Supervisor
  - 2 Consortium Validations

Infinite Campus Validations

Fall Personnel 2025-26 Credentials Validations

- Missing Paraprofessionals Credentials
- Missing SPED Credentials
- Missing Licensure/Certification
- Missing End Date
- Expires before Count Date
- Expires before Year End

SCHOOL SERVICES OF MONTANA

Infinite Campus Validations

Other Reports:

Fall Personnel 2025-26 Certification

Fall Personnel - Itinerant Employees 2025-26 (Cooperative Use Only)

Fall Personnel 2025-26 District Assignment Lists

Fall Personnel QEC 2025-26 Certification

Fall Personnel QEC 2025-26 Report Validations

Fall Personnel QEC 2025-26 Summary

Accreditation Validations (AccredMT)

Run District Reports (select District>Standards):

E. Assignment and Licensure of Staff
- ✓ Superintendent
- ✓ Curriculum

G. Professional Development

Accreditation Validations (AccredMT)

Run School Reports (select Schools>Standards):

E. Assignment and Licensure of Staff
- ✓ Misassigned
- ✓ Unlicensed
- ✓ Principal
- ✓ Library
- ✓ Counselor

Accreditation Validations (AccredMT)

Run School Reports (select Schools>Standards):

F. Teacher Load and Class Size

Accreditation Validations (AccredMT)

10.55.712 CLASS SIZE: ELEMENTARY

(1)   In single grade rooms, the maximum class size shall be:

    (a)   no more than 20 students in kindergarten and grades 1 and 2;

    (b)   no more than 28 students in grades 3 and 4;

    (c)   no more than 30 students in grades 5 through 8.

(2)   In multigrade classrooms, the maximum class size shall be:

    (a)   no more than 20 students in grades K, 1, 2, and 3;

    (b)   no more than 24 students in grades 4, 5, and 6;

    (c)   no more than 26 students in grades 7 and 8.

(3)   Multigrade classrooms that cross grade level boundaries (e.g., 3-4, 6-7) shall use the maximum of the lower grade.

(4)   In one-teacher schools, the maximum class size shall be 18 students.

(5) The school district must assign qualified human resources that comply with all fingerprint and background check requirements when exceeding maximum class sizes at a rate of 1 1/2 hours per day, per student overload.

(6) An overload of five students per classroom is considered excessive.

Accreditation Validations (AccredMT)

Accreditation Validations (AccredMT)

Run School Reports (select Schools>Standards):

I: Basic Program Offerings

MAEFAIRS Validation

New Report Coming Soon!!

ICFirstName	IC Position FTE	QEC FTE	Total FTE (Per SEID and LE)
Hannah	0.5	0.5	0.5
Lissa	1	0	1
ASHLEY	1	0	1
DEBBY	1	1	1

School Services of MONTANA

MAEFAIRS Validation

- The MAEFAIRS report lists all staff with a QEC State Assignment Code in Infinite Campus. If the QEC FTE column is "0", the staff member is not included for QEC.

- Check (in Infinite Campus):
  - Is the SEID entered/accurate?
  - Are Credentials entered/accurate?

- Check (in TMT):
  - Does the educator have an active license issued by 12/1/2025?

- Check (in DLI)
  - Does the professional have an active license issued by 10//6/2025?

HOMEWORK

Before next Friday's call –

- Run the data validations in Infinite Campus, AccredMT, and MAEFAIRS (if available) for Personnel and correct errors

School Services of MONTANA

Thank you

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

School Services of Montana