Welcome to Instructional Materials EMAT Training Allotment

August 1, 2011
Text or Email Questions To:

• Text  512.567-0857

• Email  textbook.texas.net
Your Training TEAM

• Karla Christman, TCAT

• John Lopez, TEA

• Amy McClintic, Sierra Systems - TEA

• Kim Slough, TCAT

• Larry Sims, Sierra Systems - TEA
Housekeeping

- Roll Call
- This is the first part of a three part presentation
- Today, we will cover the requisition process and rules
- Tomorrow, 2:00PM – 4:00PM, we will go over the new disbursement process and rules
- Wednesday, we will answer submitted questions
- Please keep microphones on mute during the presentation
Remember When...
Remember When...
With SB 6 – Things Have Changed!
It Takes a TEAM

Overview, John Lopez - TEA
82nd Texas Legislature
Senate Bill 6
Overview
SB6

• Creates an instructional materials fund
• Creates a per-student instructional materials allotment (IMA) to be determined by the commissioner with adjustments for high enrollment growth
• Changes “textbooks” to instructional materials throughout the Texas Education Code (TEC)
• Retains the SBOE Review and Adoption Process
SB6

- Creates an instructional materials account for each district in the EMAT system

- Requires each district to certify IMA funds have been used only for authorized purposes and that for each subject and grade level, the district provides each student with instructional materials that cover all the elements of the TEKS adopted by the SBOE for that subject and grade level
SB6

• Combines conforming and non-conforming into one list

• SBOE determines % of TEKS covered

• Revises the requirements for the adoption cycle and establishes priorities for the adoption cycle
Priorities for adoption cycle

• Foundation TEKS with substantial revisions and required assessments
• Foundation TEKS with substantial revisions
• Other foundation curriculum subjects
• Enrichment subjects
• No more than one-fourth of the foundation courses each biennium
• Proclamations issued 12 months before scheduled for adoption and include open-source as an option
SB6

• Instructional materials are the property of the district

• District may sell or dispose of instructional materials
  • out-of-adoption
  • before out-of-adoption and notify commissioner
SB6

- Repeals textbook credits
- Repeals maximum cost
- Repeals requirement for a budget-balanced cycle
- Repeals requirement for depository
- Repeals the technology allotment
- Repeals classroom set requirement
SB6

- IMA may be used for:
  - Instructional materials from SBOE list
  - Instructional materials from Commissioner list
  - Instructional materials not on the adopted list
  - Consumable materials, including workbook
  - Supplemental instructional materials
SB6

• IMA may be used for:
  – State-developed open-source instructional materials
  – Technological equipment
  – Training educational personnel directly involved in student learning in the appropriate use of instructional materials and technological equipment
  – Salaries of employees providing technical support for technological equipment
Key Points

• Provides a per-student instructional materials allotment (IMA)
• Allotment can be carried over to next biennium
• District requisitions and disbursements of funds will be subtracted from the district’s allotment
Funding Flow

• Requisitions
  – SBOE or Commissioner Adopted Materials
  – Includes Supplemental Materials (Science)
  – Adopted Open-Source Materials

• Disbursements
  – Instructional Materials off the Adopted List
  – Technological Equipment
  – Technology Services
Accessible Materials

• Braille and Large Type remain the property of the state
• NOT counted against district allotment
• Braille and Large Type requisitioned through EMAT
• Accessible Materials returned to Redistribution Center in the same manner
High Enrollment

• Calculations for Fast Growth based on PEIMS enrollment
• Adjustments provided at the beginning of each school year
• Calculations are determined by the Commissioner
Appropriations

• Supplemental Appropriations
  – $60 M – Supplemental Science
  – $39 M – Pre Kindergarten
  – $85 M – Continuing Contracts
  – Total - $184 M

• Instructional Materials Appropriations
  – Total - $608 M
Appropriations

• Total Appropriations - $792,000,000

• Factors that Impact District Allocation
  – Braille and Large Type
  – Freight
  – Insurance (flood / natural disasters)
  – Technology Lending Program
  – State-developed open-source materials
Instructional Materials Allotment

• Policy Decisions

• State Funding Calculations

• Planning for Two Year Period
  – 2011 – 2012 School Year
  – 2012 – 2013 School Year
Priority Considerations

2011 – 2012 School Year
Priority Considerations

• Instructional Materials
  – Assessment and Accountability
  – Stage your content requisitions

• Continuing Contracts

• Ongoing technology services

• Technological equipment
Instructional Materials

- Proc 2011
- Supplemental Science
- Continuing Contracts
- Commissioner’s List
- Instructional Materials Off Adopted List

IMA

Technology Services

- Training for staff directly involved with student learning
- Training for providing access to technological equipment for instruction
- Salary for providing technical support for use of technological equipment

Technology

- Computers
- eBook readers
- Mobile devices
- Interactive white boards
• Student, Teacher, Classroom, Campus, and District Needs and Goals
• Review fiscal, instructional materials and technology recommendations
• Short term, long term, biennium plans

IMA Decision Team
Superintendent
Business Office
Principals

Fiscal Team
Business Office
Principals

Technology Team
Technology Coordinator
Textbook Coordinator
Teachers

Instructional Materials Team
Curriculum Coordinator
Textbook Coordinator
Teachers

• Salaries, services needs
• Technological equipment
• Provide recommendations on technology

• District Budget/IMA
• District Needs
• Provide recommendations on expenditures

• Instructional Materials requirements and additional needs
• Provide recommendations on instructional materials
Instructional Materials Allotment Considerations

*IMA Decision Team*

- Student, Teacher, Classroom, Campus and District Needs and Goals

- Review fiscal, instructional materials and technology recommendations

- Short term, long term and biennium plans
Instructional Materials Allotment Considerations

Fiscal Team

• Superintendents

• Principals

• Business Office
Instructional Materials Allotment Considerations

Technology Team

• Technology Coordinator

• Textbook Coordinator/Instructional Materials Coordinator

• Teachers
Instructional Materials Allotment Considerations

Instructional Materials Team

- Curriculum Coordinator
- Textbook Coordinator/Instructional Materials Coordinator
- Teachers
• Student, Teacher, Classroom, Campus, and District Needs and Goals
• Review fiscal, instructional materials, and technology recommendations
• Short term, long term, biennium plans

IMA Decision Team
Superintendent
Business Office
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Fiscal Team
Business Office
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Technology Team
Technology Coordinator
Textbook Coordinator
Teachers

Instructional Materials Team
Curriculum Coordinator
Textbook Coordinator
Teachers

• District Budget/IMA
• District Needs
• Provide recommendations on expenditures

• Salaries, services needs
• Technological equipment
• Provide recommendations on technology

• Instructional Materials requirements and additional needs
• Provide recommendations on instructional materials
Short Term Considerations

• Instructional Materials
• Continuing Contracts
• Technology Services
• Stage your Requisitions
Considerations

Stage 1
- **District Preparation**
  - Consider district needs: immediate, short-term (fall), long-term (biennium)
  - Consider Fiscal, Instructional Materials, and Technology Team Recommendations
  - Ensure Textbook Coordinator participates with training

Stage 2
- **Requisition Instructional Materials**
  - Proc 2011
  - Supplemental Science
  - Continuing Contracts

Stage 3
- **Request Allotment Disbursement**
  - Instructional materials off the adopted list
  - Technology services
  - Technological equipment

Stage 4
- **Request Allotment Disbursement**
  - Additional technology services
  - Technological equipment
Priority: Instructional Materials

Proclamation 2011
- Prekindergarten Systems
- English Language Arts, Grades 2-8
- Spanish Language Arts, Grades 2-6
- English as a Second Language, Grades K-8
- Handwriting, Grades 1-3
- Spelling, Grades 1-6
- English, I-IV
- Commissioner’s List of Electronic Textbooks

Supplemental Science
- Grades 5-8
- Biology
- Chemistry,
- Integrated Physics and Chemistry (IPC)
- Physics

Continuing Contracts
- Consumable materials
- Additional materials due to student population growth
## Example District IMA Expenditure Overview

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructional Materials Allotment Beginning Balance</td>
<td>$,$$$, $$$$.00</td>
</tr>
<tr>
<td>Total Instructional Materials Expended</td>
<td>-$$, $$$$.00</td>
</tr>
<tr>
<td>Total Educational Technology Expended</td>
<td>-$$, $$$$.00</td>
</tr>
<tr>
<td>Instructional Materials Allotment Remaining Balance</td>
<td>$, $$$.00</td>
</tr>
</tbody>
</table>
Next Steps

• EMAT to open August 8

• Monthly TETNs (video conferencing) scheduled over the next few months

• Online Postings

• Instructional Materials Allotment web presence

• FAQ List posted on Instructional Material page, TEA
EMAT GUIDE

Amy McClintic, Sierra Systems - TEA
SB6 Has Changed Some of the Ordering Requirements for EMAT Materials

Here is the high-level list of these changes:

1. The district technology allotment will be added to the overall allotment balance and controlled through EMAT. Districts will receive disbursements for technology equipment, technology services, and non-adopted instructional materials through the new Allotment Disbursement transaction in EMAT.

2. Districts' remaining credit balances from prior school years will be added to the 2011-2012 school year allotment. Credits will no longer be generated for materials ordered through EMAT.

3. Requisitions will be validated against the district's remaining allotment balance throughout the school year instead of using the eligibility calculation based upon enrollment.
4. The price of instructional materials is calculated by multiplying the publisher's standard unit price times the quantity ordered. There is no longer the concept of state max cost and price reduction based upon TEKS %. 
5. There is no longer a classroom set requirement for Commissioner's List instructional materials.
6. All requisition transactions have been modified for allotment based functionality with the exception of Credit and Commissioner's List Requisitions. These requisitions are obsolete. Commissioner's List and mid-cycle instructional materials will be available on the Annual Subscription Renewal, Annual New Adoption, Annual Continuing Adoption, and Supplemental requisitions.
**Changed Ordering Requirements...**

7. Sourcing district requisitions to another district's surplus will be disabled.

8. Fast grow will be included in the district's allotment calculation and will be referred to as “High Enrollment.”

9. Lost, damaged, and worn-out textbooks will no longer be reported and reimbursed through EMAT except for EVI materials. Destroyed instructional materials (TEX-012) will still be available to districts.
**Changed Ordering Requirements...**

10. Reporting surplus and enrollment will no longer be required since eligibility-based ordering and surplus will not be enabled in EMAT.

11. SBOE and Commissioner’s List instructional materials can either be sourced to a depository or to the publisher directly.
State Board of Education
Adopted Materials

• Using the new allotment system, EMAT calculates the price of instructional materials by multiplying the publisher's standard unit price times the quantity ordered. There is no longer the concept of state max cost and price reduction based upon TEKS %. Once the district requisition is approved, all the instructional materials ordered will be sourced to the depository or to the publisher directly through EMAT online. TEA pays the depository or publisher associated to each SBOE program item in EMAT.
Commissioner's List Materials

• Using the new allotment system, EMAT calculates the price of instructional materials by multiplying the publisher's standard unit price times the quantity ordered. There is no longer the concept of state max cost and price reduction based upon TEKS %. Once the district requisition is approved, all instructional materials ordered will be sourced to the depository or to the publisher directly through EMAT online. TEA pays the depository or publisher associated to each Commissioner's List program item in EMAT.

• Commissioner's List instructional materials will no longer require a classroom set. Additionally, there will no longer be a Commissioner's List requisition. Commissioner's List materials will be available on all regular EMAT requisitions.
Commissioner's List and SBOE Adopted Process

Commissioner's List and SBOE Adopted Instructional Material Order Process

Legend
- District/Charter School
- Texas Education Agency
- Depositories/Publishers
- Freight Vendor

1. District enters requisition for instructional materials
2. TEA approves requisition
3. TEA generates purchase order
4. Purchase order dispatched to the depository or directly to the publisher online
5. Depository or publisher fills order and freight company loads materials
6. Freight company delivers materials to district
7. Depository or publisher bills TEA for instructional material and shipping costs
8. Accounting system generates payment to Depository or Publisher
9. Textbook receipt created, and inventory is recorded
## Additional Information - Commissioner's List and SBOE Adopted

| Which Requisitions are available to order the instructional materials? | • Allotment - Subscription Renewals - EMAT  
• Allotment - New Adoptions - EMAT  
• Allotment - Continuing Adoptions - EMAT  
• Allotment - Supplemental - EMAT |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>How are these instructional materials ordered?</td>
<td>TEA submits the orders on behalf of the district electronically through EDI with the Depositories or directly to the publisher through EMAT</td>
</tr>
<tr>
<td>How are these instructional materials shipped?</td>
<td>The Depositories or publisher ship the materials directly to the district</td>
</tr>
<tr>
<td>How are these instructional materials paid?</td>
<td>TEA pays the depository or publisher associated to each SBOE or Commissioner's List program item in EMAT</td>
</tr>
</tbody>
</table>
Changes to Ordering Prerequisites and the District Start Page

Ordering prerequisites for school year 2011-2012:

- Completion of the Local Board of Trustees Certification form

- Confirming district contacts and address if these have not been reviewed/updated in the last 90 days

- NEW - Certify Allotment Funds
Certify Allotment Funds Page

School Year 2011-2012

Our district/charter school certifies the following:

1. That this district's instructional materials allotment will be used only for expenses allowed by TEC §31.0211, 82nd Texas Legislature.

2. That this district purchases instructional materials that will assist the district in satisfying performance standards under Texas Education Code (TEC) §34.0241, Satisfactory Performance Standards, on assessment instruments adopted under TEC §39.023(a) and (c), 82nd Texas Legislature.

3. That the supplemental instructional materials, in combination with any other instructional materials or supplemental instructional materials used by this district, cover the essential knowledge and skills identified under Section 28.002 by the State Board of Education for the subject and grade level for which this district is requisitioning the supplemental instructional materials.

4. That this district will provide the title and publication information for any instructional materials requisitioned or purchased by the district with the district's instructional materials allotment.

Please enter your Phone number

[Certify] [Don't Certify] [Go back to Start Page Allotment]

***Districts should print this certification from their web browser to keep for their records ***
Before districts can order instructional materials, the school year prerequisites must be met.
District Start Page Phase I Changes

1. Removed the following links:
   a) Update Surplus link
   b) Ship Surplus Materials
   c) Receive Surplus Materials
   d) EMAT Enrollment
   e) Quotas
   f) Consumable Media Change
   g) Textbook Credits
   h) Eligibility based requisitions
2. Move and group EVI links and requisitions together as well as EMAT links and requisitions.

3. Move the Confirm Contacts and Addresses links to the prerequisite box.

4. Move Shipment History and Receipt History to the Reports Page.

5. Add allotment financial graph which will be based on the school year. The graph will include prior year allotment balance, current school year allotment and adjustments, and current school year allotments used. Districts will be able to drill down to the transaction detail from the graph bars displayed.

6. Add the Allotment Disbursements transaction the EMAT group box.

7. Add the Certify Allotment Funds link.
New District Start Page
Other Phase I Changes

1. Show announcements as a pop-up page per session login when a district first enters the District Start Page and the announcement is not expired

2. Add existing district credit balances to their allotment totals
Phase II Changes

1. Add Report Destroyed or Sold Materials transaction

2. Add an Allotment-based Inventory Transfer transaction
New Requisitions

Amy McClintic, Sierra Systems - TEA
The New Requisitions Are:

1. Allotment - Subscription Renewals - EMAT

2. Allotment - New Adoptions - EMAT

3. Allotment - Continuing Adoptions - EMAT

4. Allotment - Supplemental - EMAT
Revised Requisition Ordering Sequence:

1. Allotment - Subscription Renewals - EMAT
2. Allotment - New Adoptions - EMAT or Allotment - Continuing Adoptions - EMAT
3. Allotment - Supplemental - EMAT (available after the Allotment - Continuing Adoption - EMAT requisition is complete)
## Common Requisition Information

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Requisition Type</td>
</tr>
<tr>
<td>2</td>
<td>District Region or ESC number</td>
</tr>
<tr>
<td>3</td>
<td>County district number and district name</td>
</tr>
<tr>
<td>4</td>
<td>District Type</td>
</tr>
<tr>
<td>5</td>
<td>Business Unit for EMAT internal data</td>
</tr>
<tr>
<td>6</td>
<td>School Year</td>
</tr>
<tr>
<td>7</td>
<td>Requisition ID or NEXT if new requisition</td>
</tr>
<tr>
<td>8</td>
<td>Requisition Status</td>
</tr>
</tbody>
</table>

![Diagram showing the common requisition information fields with arrows pointing to each field](image.png)
Next Section –
Allotment Activity and Balance

1. This Requisition = the Allotment amount used on the current requisition
2. Total from Pending Transactions = the Allotment amount used on the other incomplete transactions such as requisitions or disbursements
3. Remaining Balance = the remaining Allotment amount available to be used on the requisition
4. **Save Work** button saves requisition data
5. **Go Back to Start Page** link returns the browser to the Start page
1. Subscription Renewals
**Allotment - Subscription Renewals**

*EMAT* Subscription Renewals Requisition will be available after the school year prerequisites have been completed.

To access and use the *Allotment – Subscription Renewals – EMAT* Requisition:

1. From the District Start Page, click on the **Create New Requisition** link, shown next to the Allotment – Subscription Renewals – EMAT requisition type.
Subscription Renewals...

2. The Requisition Summary tab is displayed. The Shipping Date defaults to the first available or preferred shipping date. If you want to select another shipping date, click on the **Select an Available Shipment Date** link.

3. The screen has a tab for Subscription Requisition. The **Save Work** button is on this tab. The Save Work button saves all the requisition data when selected.
Subscription Renewals...

4. Click on the **Subscription Requisition** tab and this is displayed:

5. Enter the **Student Requisition Quantity** and/or the **Teacher Requisition Quantity** for each Subscription item you would like to renew.
Subscription Renewals...

For your reference, several informational columns are shown to the right of the quantity columns:

- **EMAT Type** – SBOE Adopted, Commissioner’s List, or Open Source.
- **TEKS %** - Texas Essential Knowledge Skills percentage covered by the listed item
- **Mid Cycle Checkbox** – When checked, indicates the item was adopted as part of a mid-cycle adoption and not during a standard adoption
- **Standard Price** – represents the unit price for the item. The price will be multiplied by the quantity ordered to calculate the Extended Amount
- **Extended Amount** – Calculated amount will be deducted from the district allotment balance
- **PEIMS Enrollment** – The grade level enrollment loaded from TEA PEIMS system.
- **Inventory Quantity on Hand** – The district’s current inventory for the item
- **Previous Inventory** – Past inventory quantities by school year
Subscription Renewals...

6. After entering a quantity, the Extended Amount will be calculated as Standard Price * the quantity entered. In the top portion of the page, the amounts next to This Requisition and Remaining Balance should change to reflect your entries.

7. After entering the requisition information, ALWAYS click the Save Work button. If you exit the requisition page or the EMAT system without saving, your data will be lost.
Subscription Renewals...

- The Requisition Summary also displays the Total TEA pays to Publishers and the Total TEA pays to Districts.
Subscription Renewals...

8. To review the requisition before submitting, click on the **View/Print Requisition Summary**.
9. When all requisition information is entered and saved, click on the **Submit to TEA** button to submit the requisition for processing.

<table>
<thead>
<tr>
<th>Select a Delivery Address</th>
<th>Requisition Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delivery Address</strong></td>
<td></td>
</tr>
<tr>
<td>079906002</td>
<td></td>
</tr>
<tr>
<td>EMAT Delivery Point</td>
<td></td>
</tr>
<tr>
<td>15417 HWY 36</td>
<td></td>
</tr>
<tr>
<td>NEEDVILLE</td>
<td>TX 77461</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select a Ship Date</th>
<th>View/Print Options</th>
<th>Financial Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shipping Date</strong></td>
<td><strong>View/Print Requisition Summary</strong></td>
<td>Total TEA Paid to Publisher(s) $0.00</td>
</tr>
<tr>
<td>08/04/2011</td>
<td><strong>View/Print Order List</strong></td>
<td>Total TEA Paid to District $0.00</td>
</tr>
</tbody>
</table>

To submit a requisition, you must enter your orders on the Grade level tabs above, select a Delivery Address and a Shipment date, and click “Submit to TEA. The requisition will be processed after TEA approval.

To save a requisition without submitting, click “Save Work”. You can then come back later to complete and submit the requisition.

To cancel a requisition, click “Cancel Requisition”. Cancelled requisitions will not be processed. A requisition cannot be cancelled or changed after it has been submitted to TEA.

**Submit To TEA**  **Cancel Requisition**
Subscription Renewals...

10. After saving and submitting the requisition, click on the Go back to Start Page link. Notice that the status of the requisition is changed to Submitted. The date submitted and the new requisition ID is displayed.
2. New Adoptions
New Adoptions Requisition

• The Annual New Adoptions Requisition is subject to EMAT prerequisites.

• The purpose of this requisition is to order newly adopted Commissioner's List and SBOE materials, which will be available for order during the new school year.
1. To access and use the *Allotment – New Adoptions – EMAT* Requisition from the District Start Page, click on the **Create New Requisition** link, shown next to the Allotment – New Adoptions – EMAT requisition type.

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**New Adoptions Requisition...**
New Adoptions Requisition...

2. The Requisition Summary tab is displayed. The requisition screen has a tab for each grade level through eighth grade and a tab for each subject area for high school when there is newly adopted material adopted for the respective grade.

3. The Save Work button is on this tab. The Save Work button saves all the requisition data when selected.
New Adoptions Requisition...

4. Click on the Pre-Kindergarten tab:

![Image showing the Pre-Kindergarten tab selected in the New Adoptions Requisition system]
New Adoptions Requisition...

5. Enter the **Student Requisition Quantity** and/or the **Teacher Requisition Quantity** for each New Adoption item you would like to order. For your reference, several informational columns are shown to the right of the quantity columns:

- **EMAT Type** – SBOE Adopted, Commissioner’s List, or Open Source.
- **TEKS %** - Texas Essential Knowledge Skills percentage covered by the listed item.
- **Mid Cycle Checkbox** – When checked, indicates the item was adopted as part of a mid-cycle adoption and not during a standard adoption.
- **Standard Price** – represents the unit price for the item. The price will be multiplied by the quantity ordered to calculate the **Extended Amount**.
- **Extended Amount** – Calculated amount will be deducted from the district allotment balance.
New Adoptions Requisition...

6. After entering a quantity, the Extended Amount will be calculated as Standard Price * the quantity entered. In the top portion of the page, the amounts next to This Requisition and Remaining Balance should change to reflect your entries.
New Adoptions Requisition...

7. After entering the requisition information, ALWAYS click the *Save Work* button. If you exit the requisition page or the EMAT system without saving, your data will be lost. The Requisition Summary also displays the total TEA pays to publishers and the total TEA pays to districts.
8. To review the requisition before submitting, click on the **View/Print Requisition Summary**.

---

**Requisition Summary**

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item 1</td>
<td>100</td>
<td>$5.00</td>
<td>$500.00</td>
</tr>
<tr>
<td>Item 2</td>
<td>50</td>
<td>$10.00</td>
<td>$500.00</td>
</tr>
<tr>
<td>Item 3</td>
<td>200</td>
<td>$2.50</td>
<td>$500.00</td>
</tr>
</tbody>
</table>

Total TEA paid to Publisher: $1,500.00

Total TEA paid to District: $1,500.00

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*If an amount appears next to "Total TEA paid to District", the school district or open-enrollment charter school is responsible for paying that amount directly to the specified publisher. Payment should be made to TEA. Any amount not paid to TEA will be payable at the discretion of the publisher or the designated publisher's depositary.
New Adoptions Requisition...

9. When all requisition information is entered and saved, click on the **Submit to TEA** button to submit the requisition for processing.

Select a Delivery Address

**Delivery Address**: 079906002

EMAT Delivery Point
16417 HWY 36

NEEDVILLE TX 77461

Select a Ship Date

**Shipping Date**: 08/04/2011

View/Print Options

**View/Print Requisition Summary**
**View/Print Order List**

Financial Information

**Total TEA Paid to Publisher(s)**: $0.00
**Total TEA Paid to District**: $0.00

To submit a requisition, you must enter your orders on the Grade level tabs above, select a Delivery Address and a Shipment date, and click “Submit to TEA”. The requisition will be processed after TEA approval.

To save a requisition without submitting, click “Save Work”. You can then come back later to complete and submit the requisition.

To cancel the requisition, click “Cancel Requisition”. Cancelled requisitions will not be processed. A requisition cannot be cancelled or changed after it has been submitted to TEA.

Submit to TEA Cancel Requisition
New Adoptions Requisition...

10. After saving and submitting the requisition, click on the Go back to Start Page link. Notice that the status of the requisition is changed to Submitted. The date submitted and the new requisition ID is displayed.
3. Continuing Adoptions
Continuing Adoptions

• The Annual Continuing Adoptions Requisition is subject to EMAT prerequisites.

• The purpose of this requisition is to order previously adopted Commissioner's List and SBOE materials, which will be available for order during the new school year. The Continuing Adoption Requisition is important for ordering consumable materials and materials for new students if the district is experiencing growth.
Continuing Adoptions...

To access and use the *Allotment – Continuing Adoptions – EMAT* Requisition:
1. From the District Start Page, click on the **Create New Requisition** link, shown next to the Allotment – Continuing Adoptions – EMAT requisition type.
Continuing Adoptions...

2. The Requisition Summary tab is displayed. The requisition screen has a tab for each grade level through eighth grade and a tab for each subject area for high school.

3. The **Save Work** button is on this tab. The Save Work button saves all the requisition data when selected.
Continuing Adoptions...

4. Click on the 1st Grade tab and the following page is displayed. It is important to note that materials previously ordered for a specific Multilist Code [MLC] will automatically default in the Requisition Detail portion of the page. If there are no materials ordered by the district for a specific Multilist Code, then no materials will be shown.
5. To order different materials for a Multilist Code that has materials previously ordered, the icon must be selected. An additional row for the Multilist Code [MLC] will appear and the new material can be selected by clicking on the prompt icon.
Continuing Adoptions...

6. Enter the **Student Requisition Quantity** and the **Teacher Requisition Quantity** for each New Adoption item you would like to order. For your reference, several informational columns are shown to the right of the quantity columns.

- EMAT Type – SBOE Adopted, Commissioner’s List, or Open Source.
- TEKS % - Texas Essential Knowledge Skills percentage covered by the listed item.
- Mid Cycle Checkbox – When checked, indicates the item was adopted as part of a mid-cycle adoption and not during a standard adoption.
- Standard Price – represents the unit price for the item. The price will be multiplied by the quantity ordered to calculate the Extended Amount.
- Extended Amount – Calculated amount will be deducted from the district allotment balance.
- PEIMS Enrollment – The grade level enrollment loaded from TEA PEIMS system.
- Inventory Quantity on Hand – The district’s current inventory for the item.
Continuing Adoptions...

7. After entering a quantity, the Extended Amount will be calculated as Standard Price * the quantity entered. In the top portion of the page, the amounts next to This Requisition and Remaining Balance should change to reflect your entries.

8. After entering the requisition information, ALWAYS click the Save Work button. If you exit the requisition page or the EMAT system without saving, your data will be lost. The Requisition Summary also displays the total TEA pays to publishers and the total TEA pays to districts.
Continuing Adoptions...

9. To review the requisition before submitting, click on the View/Print Requisition Summary.
10. When all requisition information is entered and saved, click on the **Submit to TEA** button to submit the requisition for processing.

To submit a requisition, you must enter your orders on the Grade level tabs above, select a Delivery Address and a Shipment date, and click “Submit to TEA”. The requisition will be processed after TEA approval.

To save a requisition without submitting, click “Save Work”. You can then come back later to complete and submit the requisition.

To cancel a requisition, click “Cancel Requisition”. Cancelled requisitions will not be processed. A requisition cannot be cancelled or changed after it has been submitted to TEA.

![Image of requisition form with fields for Delivery Address, Requisition Information, Select a Ship Date, View/Print Options, Financial Information, and buttons for Submit To TEA and Cancel Requisition]
Continuing Adoptions...

11. After saving and submitting the requisition, click on the Go back to Start Page link. Notice that the status of the requisition is changed to Submitted. The date submitted and the new requisition ID is displayed.
4. Supplemental Requisition
Supplemental Requisition...

To access and use the Allotment – Supplemental – EMAT Requisition:

1. From the District Start Page, click on the Create New Requisition link, shown next to the Allotment – Supplemental – EMAT requisition type.
Supplemental Requisition...

2. The Requisition Summary tab is displayed. The requisition screen has a tab for each grade level through eighth grade and a tab for each subject area for high school.

3. The **Save Work** button is on this tab. The Save Work button saves all the requisition data when selected.
Supplemental Requisition...

4. Click on the **Kindergarten** tab.

5. Enter the **Student Requisition Quantity** and the **Teacher Requisition Quantity** for each New Adoption item you would like to order. For your reference, several informational columns are shown to the right of the quantity columns:

   - **EMAT Type** – SBOE Adopted, Commissioner’s List, or Open Source.
   - **TEKS %** - Texas Essential Knowledge Skills percentage covered by the listed item.
   - **Mid Cycle Checkbox** – When checked, indicates the item was adopted as part of a mid-cycle adoption and not during a standard adoption.
   - **Standard Price** – represents the unit price for the item. The price will be multiplied by the quantity ordered to calculate the Extended Amount.
   - **Extended Amount** – Calculated amount will be deducted from the district allotment balance.
Supplemental Requisition...

6. After entering a quantity, the Extended Amount will be calculated as Standard Price * the quantity entered. In the top portion of the page, the amounts next to This Requisition and Remaining Balance should change to reflect your entries.

7. After entering the requisition information, ALWAYS click the Save Work button. If you exit the requisition page or the EMAT system without saving, your data will be lost. The Requisition Summary also displays the total TEA pays to publishers and the total TEA pays to districts.
8. To review the requisition before submitting, click on the **View/Print Requisition Summary**.
9. When all requisition information is entered and saved, click on the Submit to TEA button to submit the requisition for processing.

To submit a requisition, you must enter your orders on the Grade level tabs above, select a Delivery Address and a Shipment date, and click “Submit to TEA”. The requisition will be processed after TEA approval. To save a requisition without submitting, click “Save Work”. You can then come back later to complete and submit the requisition. To cancel a requisition, click “Cancel Requisition”. Cancelled requisitions will not be processed. A requisition cannot be cancelled or changed after it has been submitted to TEA.
Supplemental Requisition...

During submit the system checks to see if the transaction exceeds the allotment warning % set by TEA for the school year. This is a warning message only and will not prevent the transaction from further processing. If the remaining allotment balance is exceeded, the transaction cannot be saved or submitted for processing.
Supplemental Requisition...

10. After saving and submitting the requisition, click on the **Go back to Start Page** link. Notice that the status of the requisition is changed to Submitted. The date submitted and the new requisition ID is displayed.
Questions From Region ESCs
and TEXT/E-MAILs

Kim Slough – TCAT
Karla Christman - TCAT
Text or Email Questions To:

• Text  512.567-0857

• Email  textbook.texas.net
Welcome
to
Instructional Materials
EMAT Training
Allotment

August 2, 2011
Text or Email Questions To:

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• Email  textbook.texas.net
Your Training TEAM

- Karla Christman, TCAT
- John Lopez, TEA
- Amy McClintic, Sierra Systems - TEA
- Kim Slough, TCAT
- Larry Sims, Sierra Systems - TEA
Housekeeping

• Roll Call
• This is the second part of a three part presentation
• Today, we will cover the disbursement process and rules
• Tomorrow, 10:00AM – 12:00PM, we will answer submitted questions
• Please keep microphones on mute during the presentation.
Q & A with JOHN LOPEZ

• John Lopez, TEA

• Karla Christman, TCAT

Review of yesterday’s presentation - Requisitions
Allotment Disbursements

Larry Sims, Sierra Systems - TEA
**Allotment Disbursements**

- Allotment Disbursement functionality in EMAT enables the school districts to order non state-adopted Instructional materials, Technology Equipment and Technology Services (including supporting products which are not on the TEA approved list) from the fixed dollar allotment which is available in EMAT for each district for school year 2011-2012
Key Points Regarding Allotment Disbursements

• Allotment Disbursement transactions are validated against the districts' remaining allotment balance throughout the year.

• Allotment Disbursement transactions can be used to order non state-adopted Instructional materials, Technology Equipment and Technology Services.
Key Points Regarding Allotment Disbursements...

• Allotment Disbursements are controlled by TEA administrators and they activate/deactivate the allowable Disbursement Types and Categories.

• TEA Administrators approve the Allotment Disbursement transactions prepared by the districts. After approval, payments are made directly to the districts.
Allotment Disbursements

To access the Allotment Disbursement Summary:
1. From the District Start Page, click the Allotment Disbursement link.
Allotment Disbursements...

2. The Allotment Disbursement **Summary Page** is displayed.

3. Allotment Disbursement **Summary Page** displays the list of Allotment Disbursement transactions with different Statuses such as In Progress, Submitted and Completed. To create a new Allotment Disbursement transaction, click on **NEXT** link.
4. If a district wants to continue its In-Progress Allotment Disbursement transaction, the district clicks on the **Transaction ID** link, so that the **Allotment Disbursement Page** is displayed.

```plaintext
<table>
<thead>
<tr>
<th>School Year</th>
<th>NEXT</th>
<th>Transaction Date</th>
<th>Disbursement Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2011-2012</td>
<td>NEXT</td>
<td></td>
<td>Create New Disbursement</td>
<td></td>
</tr>
<tr>
<td>2 2011-2012</td>
<td>D000020828</td>
<td>07/18/2011</td>
<td>Technology Services</td>
<td>Completed</td>
</tr>
<tr>
<td>3 2011-2012</td>
<td>D000020831</td>
<td>07/18/2011</td>
<td>Instructional Materials</td>
<td>In Progress</td>
</tr>
<tr>
<td>4 2011-2012</td>
<td>D000020830</td>
<td>07/18/2011</td>
<td>Technological Equipment</td>
<td>Submitted</td>
</tr>
<tr>
<td>5 2011-2012</td>
<td>D000020829</td>
<td>07/18/2011</td>
<td>Instructional Materials</td>
<td>Completed</td>
</tr>
</tbody>
</table>
```

*Go back to Start Page Allotment*
Allotment Disbursements...

5. District can ONLY cancel the transaction which is in Submitted Status. If the transaction Status is completed, it means that TEA has already approved the transaction and check payment will be issued to the district
Allotment Disbursements...

6. To cancel the transaction, click **Cancel Disbursement** button on **Allotment Disbursement** Page
Allotment Disbursements Transactions
Allotment Disbursements Transactions

There are three different Allotment Disbursement type transactions in EMAT:

1. Instructional Materials
2. Technological Equipment
3. Technology Services.
1. Instructional Materials
1. **Instructional Materials Disbursement**

Used by districts to order instructional materials that are **NOT** State Board or Commissioner adopted.

1. From the District Start Page, click the **Allotment Disbursement** link.
Instructional Materials Disbursement...

2. The Allotment Disbursement **Summary page** is displayed.

3. Click **Next** link under the Transaction ID field.
**Instructional Materials Disbursement...**

4. **Allotment Disbursement type Page** is displayed. Select **Instructional Materials** option from the dropdown list and click **OK** button.
**Instructional Materials Disbursement...**

5. Allotment Disbursement page for Instructional Materials is displayed.
6. Select the appropriate **Disbursement category** by clicking the magnifying glass icon.

Disbursement Categories are:

- Bilingual Materials
- Open Source
- Supplemental Materials
7. New Grid under **Disbursement Lines box** is displayed which allows the user to enter the data for the Instructional Materials items to be ordered.

8. User is required to enter the following fields:

   - Publisher
   - Title
   - ISBN
   - Author
   - Subject
   - Grade
   - Course
   - Student Served

   - Copyright
   - Edition
   - Media format
   - Material Type
   - Language
   - TEKS%
   - Quantity
   - Unit Price.
Instructional Materials Disbursement...

9. User can add additional Instructional Materials by clicking on the plus “+” sign to add another line.
10. Once the User enters all the required fields, user selects **Save Work** button. New transaction ID is generated, when the work is saved.

11. Once the user entry is complete, certify the transaction by clicking **Certify & Submit** button.
Instructional Materials Disbursement...

12. **Certify Requisition** page is displayed. Enter the phone number to certify the transaction and click OK button.

13. After clicking **OK** button, the **Allotment Disbursement page** is displayed again, and user selects **Go Back to Allotment Summary Page** link.
2. **Technological Equipment Disbursement**
Technological Equipment Disbursement

The Technological Equipment Allotment Disbursement type transaction can be used by districts to order Technological Equipments

1. To access Allotment Disbursement-Technological Equipment transaction, go to the District Start Page, click the Allotment Disbursement link
Technological Equipment Disbursement...

2. The Allotment Disbursement Summary page is displayed
3. Click Next link under the Transaction ID field
4. Allotment **Disbursement type Page** is displayed. Select **Technological Equipment** option from the dropdown list and click **OK** button.
5. Allotment Disbursement page for Technological Equipment is displayed

6. Select the appropriate Disbursement category by clicking the magnifying glass icon.

Disbursement Categories are as follows:

- Desktop
- eBook
- Learning Lab
- Laptop
- Tablet
- Whiteboard
- Workstation
**Technological Equipment Disbursement ...**

7. New Grid under **Disbursement Lines box** is displayed which allows the user to enter the data for the Technological Equipment items to be ordered.

8. User is required to enter the following fields:

   - **Student Served**
   - **Administrators Served**
   - **Manufacturer**
   - **Primary Use**
   - **Grade, Quantity**
   - **Unit Price**
9. User can add additional Technological Equipments by clicking on the plus “+” sign to add another line.

10. Once the User enters all the required fields, user selects **Save Work** button. New transaction ID is generated, when the work is saved.
11. Once the user entry is complete, certify the transaction by clicking **Certify & Submit** button.
12. **Certify Requisition** page is displayed. Enter the phone number to certify the transaction and click **OK** button.

13. After clicking **OK** button, the **Allotment Disbursement page** is displayed again, and user selects **Go Back to Allotment Summary Page** link.
3. Technological Services Disbursement
**Technological Services Disbursement**

This type transaction can be used by districts to create the transaction and get paid for Technology Services rendered by the district.

To access Allotment Disbursement-Technology Services transaction:

1. From the District Start Page, click the **Allotment Disbursement** link.
Technological Services Disbursement...

2. The Allotment Disbursement **Summary page** is displayed.
3. Click **Next** link under the Transaction ID field.
Technological Services Disbursement...

4. Allotment Disbursement type Page is displayed. Select Technology Services option from the dropdown list and click OK button.

5. Allotment Disbursement page for Technology Services is displayed.
6. Select the appropriate **Disbursement category** by clicking the magnifying glass icon.

Disbursement Categories:
- Professional Development
- Contracted Services
- Lease Equipment
- Capital Outlay
- Supplies & Materials
- Salary
- Other Operating Expenditures
7. New Grid under **Disbursement Lines box** is displayed which allows the user to enter the data for the Technology Services to be ordered.

8. User is required to enter **Description of the Service, Quantity** and **Unit Price**.
Technological Services Disbursement...

9. User can add additional Technology Services by clicking on the plus “+” sign to add another line.

10. Once the User enters all the required fields, user selects **Save Work** button. New transaction ID is generated, when the work is saved.
11. Once the user entry is complete, *certify* the transaction by clicking *Certify & Submit* button.

12. **Certify Requisition** page is displayed. Enter the phone number to certify the transaction and click OK button.

13. After clicking **OK** button, the **Allotment Disbursement page** is displayed again, and user selects **Go Back to Allotment Summary Page** link.
Allotment Inquiry and Reports

Larry Sims, Sierra Systems - TEA
Allotment Inquiry and Reports...

In order for district's to obtain information regarding their allotment balance and transactions, the EMAT/EVI system provides both Allotment online inquiry and reports.

To review district allotment balance and transaction information online:
1. From the District Start Page, double-click the Allotment graph bar in the left center of the page.

![Allotment Inquiry and Reports](image)
Allotment Inquiry and Reports...

2. The **Allotment Summary Page** displays. This page shows a summary of all transactions both pending and complete that affected a district's allotment balance.

![Allotment Summary](image)
Allotment Inquiry and Reports...

3. For additional transaction detail, click on the "Allotment Report" link on the Allotment Summary Page. After the "Allotment Report" link is selected, the Allotment Report displays.

![Allotment Report](image)
Questions From Region ESCs and TEXT/E-MAILs

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Welcome
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Allotment

August 3, 2011
Your Training TEAM

• Karla Christman, TCAT
• John Lopez, TEA
• Amy McClintic, Sierra Systems - TEA
• Kim Slough, TCAT
• Larry Sims, Sierra Systems - TEA
Housekeeping

• Roll Call
• This is the third part of the EMAT presentation
• Today we will spend time responding to questions received from the last two days as well as take questions from the ESC’s
• Wednesday we will answer submitted questions
• Please keep microphones on mute until questions are requested
It Takes a **TEAM**

John Lopez - TEA
Questions From Region ESCs and TEXT/E-MAILs

Kim Slough – TCAT
Karla Christman - TCAT