

# *Getting Started with ISEE* **Intro To Staff Reporting**

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***The Idaho State Board of Education***

MAKING POLICY FOR K-20 PUBLIC EDUCATION IN IDAHO, CREATING OPPORTUNITY  
FOR LIFELONG ATTAINMENT OF HIGH QUALITY EDUCATION, RESEARCH, AND  
INNOVATION.

# Overview



- Resources
- Staff Reporting
- Staff Assignment file
- Staff Demographic file
- Long Term Sub reporting
- Alternative Authorization



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# Resources



[boardofed.idaho.gov/isee](https://boardofed.idaho.gov/isee)

Files Training

### Resource Files

General Files

- > Program Information
- > ISEE Forms

ISEE Manuals

- > 2022-2023
- > 2021-2022
- > 2020-2021

ISEE Data Collection Files

- > 2022-2023
- > 2021-2022
- > 2020-2021

Assignment Credential Manuals  
Staff Data Guidance Manual  
Attendance Manual

Items and Option Sets

# Submission Schedule



## 2022-2023 ISEE Data Submission Schedule

ISEE Data Submission	Collection Period (Data)	Submission Period
ISEE Summer Alt 2022 v12	05/23/2022 – 08/26/2022	08/05/2022 – 09/02/2022
ISEE October 2022 v13	SY23 Start Date – 09/30/2022	09/30/2022 – 10/17/2022
ISEE November 2022 v13	SY23 Start Date – 11/04/2022	11/04/2022 – 11/18/2022
ISEE December 2022 v13	SY23 Start Date – 12/02/2022	12/02/2022 – 12/16/2022
ISEE March 2023 v13	SY23 Start Date – 03/03/2023	03/03/2023 – 03/17/2023
ISEE May 2023 v13	SY23 Start Date – 05/05/2023	05/05/2023 – 05/19/2023
ISEE End of Year 2023 v13	SY23 Start Date – SY23 End Date	05/22/2023 – 06/16/2023
ISEE Summer Alt 2023 v13	05/22/2023 – 08/25/2023	08/04/2023 – 09/01/2023

Snapshot data is reported first in the October upload, but is not pulled for the actual funding snapshot until the November upload.

This data from the beginning of your school year and the first Friday of November is called the Midterm Reporting Period



# Important Dates



**A quick review of important dates to remember.**

# Important Dates (1)



## October 17, 2022

- Last day to submit initial data
- Attendance/Enrollment & Staffing
- Teacher Certification



# Important Dates (2)



## November 18, 2022

- Last day to submit initial ISEE Nov data
- Attendance/Enrollment & Staffing
- Special Ed Child Counts
- Teacher Certification





# Important Dates (3)



## December 2, 2022

- ISEE Nov Corrections Deadline
- ISEE Dec Submission Opens
  - Due December 16, 2022



# Important Dates (4)



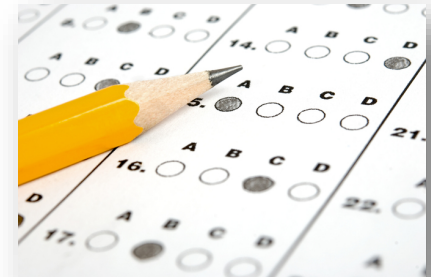
March 17, 2023

- Deadline for May 15 Payment



May 19, 2023

- Deadline for Staffing - July 15 Payment



June 16, 2023

- Deadline for Attend - July 15 Payment



# Important Dates



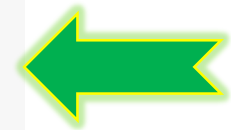
## Public School Finance

The Public School Finance Department staff prepares payments and provides technical support to Idaho's School Districts and Charter Schools about revenues, expenditures, budgets, and school property taxes with information provided by Idaho's School Districts and Charter Schools and other governmental entities.

<http://www.sde.idaho.gov/finance/>

*The documents below are the most current available. For documents from previous years, please view the [Archives](#).*

### HIGHLIGHTS



# What Does This Data Affect?



- **All data submissions must reflect correct information as accurately as possible**
- **(I.C. 33-1004D):**
  - Requirement to report all employees of the school district/charter school, regardless of their effect on funding
- **Annual Staff Statistical Data:**
  - Staff salaries and staff activities are published on January 1 each year
- **Salary Based Apportionment and Benefit Apportionment Funding (General Fund Only)**
  - Affects about 85% of a district/charter's funding!
- **Other Data Requests** – Legislature, Governor, Education Associations and Other Stakeholders, Federal Reporting, National Organizations, Public Information Requests, Etc.

# Staff Reporting



What is the “Snapshot”?

- The staff reported with active assignments as of the last Friday of September.

I corrected my data, why didn't the reports change?

- This data will not change after the snapshot unless your superintendent asks for this to be recalculated



# Staff Reporting (1)



## Who is required to be reported?

All staff employed on a regular basis regardless of funding source

- Returning employees
  - Update years of experience and education as of snapshot
  - This includes Coaches, clerical, etc.
    - Even coaches who are not contracted employees
- New employees

# Staff Reporting (2)



## Who does not need to be reported?

- Emergency help
- Irregular help
  - i.e. short term substitutes, volunteers, student food service employees.
- Non-District Contracted Staff (report with ISEE form 6)
  - To recoup underutilized FTE
  - These can now be reported on a NE contract

# Staff Reporting (3)



## Terminated employees

- Report throughout the year as they happen
- Report Summer terminations
- June upload with a future exit date (i.e. 8/31/2022)
  - Correct previous June upload
  - Only need to report terminated employees once
  - Do not report in the next school year to terminate

# Staff Reporting (4)



## **Employed by multiple districts/charters**

- And only hold one contract
  - Must be reported where contract is held
  - The sharing location should also report this person, but they would be reported with an NE contract type

# Staff Reporting (5)



## **NE – Non-Employee Contract**

- Should report all contracted personnel not directly employed by the district
- Positions not paid through your payroll system
- i.e. Psychologists, SLP's, issued a 1099
- Also report on Form 6 if needing to restore use it or lose it funds
- Must meet certification standards



# Staff Reporting (6)



These are the only fields required for staff on an NE contract type

- Hire Date
- Employment Status
- Contract Type
- Base Salary
- Contract Hours
- Contract FTE
- Fund Source(s)
- Fund source percentage(s)
- Staff Assignment information

# Staff Reporting (7)



These fields are no longer required for staff on an NE contract type

- Certification Year
- Certification State
- Highest Degree
- Degree Year
- Claimed Degree Institution
- Claimed Degree State
- Claimed Major
- Additional Credits
- Transcript Year
- Idaho K12 Experience
- Out of state Experience
- Private School Experience
- Idaho Higher Ed Experience
- Out of state Higher Ed Experience
- Years in District

# Staff Reporting (8)



There are 4 types of staff (for funding purposes)

- Administrative - Assignment codes 4xxxx.
- Pupil Services - Assignment codes 32xxx
- Instructional -
- Classified (non-certificated) - Assignment codes 9xxxx

# Staff Reporting (9)



2 staff files that work together

- **Staff Assignment file**

- Assignment data
- Non-certificated funding data

- **Staff demographics file**

- Demographic data
- Education and Experience History
- Certificated funding data

# Assignment Credential Manual



What is a staff assignment?

Filter by column headers

Content Type	Grade Level Content	Code	Assignment Title	Assignment/Content Description	Endorsement
Secondary	5-12	02052	Algebra I	Algebra I courses include the study of properties and operations of the real number system; evaluating rational algebraic expressions; solving and graphing first-degree equations and inequalities; translating word problems into equations; operations with and factoring of polynomials; and solving simple quadratic equations.	7300 Mathematics (6-12) 7320 Mathematics - Basic (6-12) 8300 Mathematics (5-9) 8320 Mathematics - Basic (5-9)
Elementary	2	23005	Grade 2	Grade 2 assignment content is not differentiated by subject area. The assignment focus is on content that is grade-specific and covers various subjects throughout the day, rather than a single subject-specific content area. Specific course content depends upon Idaho state standards for Grade 2.	7010 All Subjects (K-8) 7083 Blended Early Childhood/Early Childhood Special Education (Birth-Grade 3)



# Items & Option Sets File



## Items and Option Sets File

Item Description	Field Name	Definition	Type	Length	Format	Option Set Name
<b>Staff Demographics</b>	<b>Staff</b>					
Idaho Staff ID	idStaffId	The staff members assigned unique Idaho identification number.	VarChar	9	XXXXXXX XXX	
Last Name	lastName	The complete legal surname/family name(s). That which may be inherited (passed) to an individual at birth, baptism, or during another naming ceremony, or through legal change.	VarChar	35		
First Name	firstName	The complete legal given first name(s) given to an individual at birth, baptism, or during another naming ceremony, or through legal change.	VarChar	35		
Highest Degree Claimed	highestDegree	The highest degree claimed by the employee for funding purposes.	Option Set	2	XX	<a href="#">Education Degree</a>
Year of Degree Claimed	degreeYear	The year in which the highest degree being claimed was earned	VarChar	4	YYYY	
Institution Where Highest Claimed Degree was Obtained	claimDegreeInst	The name of the institution that granted the highest degree the employee has Claimed for funding purposes	Option Set	3	999	<a href="#">Higher Ed Institutions</a>
State of Institution Granting Claimed Degree	claimDegreeState	The two character postal code where the Institution of claimed Highest degree is based	Option Set	2	XX	<a href="#">State Province</a>

# Staff Assignment File – 15 fields



- **Certificated employees (for teachers, this will come from your SIS)**
  - Assignment codes tied to contracts
  - FTE – full time, every day, all year = 1
    - Late hires are not a 1 FTE
  - Teaching Role
- **Non-Certificated Employees**
  - Assignment code
  - FTE
    - $(\text{Hours per week} \times \text{Weeks per year}) / 2080$
  - Reports salary information for classified employees
    - Pay per hour
    - Hours per week – Rounded to half hour
    - Weeks per year – no fractions

# Staff Demographics



Huge spreadsheet (126 columns)

- Basic demographic data
- 4 potential degrees
- 3 potential contacts
- 4 potential extra pay codes
- 4 potential non-certified funding codes

# Staff Demographics (1)



**isCertified** – does employee have certified assignments

- If yes, then contract information is required
- Long term sub, even if certified would report isCertified = N

# Staff Demographics (2)



## Initial certification year (state, etc.) –

- Certification year, may not be their degree year
- Regardless of state- **Idaho certification may not be their initial certification**
- Alternate Authorization & ABCTE
  - Initial cert date = issue date
  - Teacher to New certification = date of first certificate



# Staff Demographics (3)



- **Employment Date** – current continuous employment
  - Changing from classified to certified, report their first date of continuous employment
- Education fields – need to be accurate – do not update during current year

# Staff Demographics (4)



## Degrees

- Highest degree for **funding purposes**
  - BA + 60 credits index multiplier is higher than a MA +5 credits
  - IF BA + credits is higher, report the MA in the Additional Degree field
- Occupational Specialist (OS)
  - Treated as a bachelors degree, may report in Degree fields
- Additional Credits – differ for Admin and Instructional/Pupil service
  - Credits beyond the highest degree claimed for funding

# Staff Demographics (5)



- The index table has degrees and credits that overlap
  - Use the most beneficial multiplier
- Example:
  - A certificated employee has 5 credits beyond their MA and initial certification
  - They also have 62 credits earned after their BA and initial certification
  - The index multiplier is higher if reported as BA+60 instead of a MA + 0

EXPERIENCE AND EDUCATION MULTIPLIER TABLE							
				MA	MA+12	MA+24	MA+36
Year	BA	BA+12	BA+24	BA+36	BA+48	BA+60	ES/DR
0	1.00000	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730
1	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410
2	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260
3	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290
4	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510

- If also instructional or pupil services...MA would be reported as second degree to receive Education Allocations

# Staff Demographics (6)



## Index Multiplier

- BA + 60 Credits is higher than a MA + 5

### Experience and Education Multiplier table

Year	BA	BA+12	BA+24	MA	MA+12	MA+24	MA+36
				BA+36	BA+48	BA+60	ES/DR
0	1.00000	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730
1	1.03750	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410
2	1.07640	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260
3	1.11680	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290
4	1.15870	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510
5	1.20220	1.24730	1.29410	1.34260	1.39290	1.44510	1.49930

# Highest Degree and Additional Credits



## Administrative Index

- Additional Credits
  - Uses Index charter from 33-1004A
  - BA + credits may be higher than an MA + credits
  - Earned beyond the degree reported and after initial certification
  - ~~Along with the degree, must be in a relevant pedagogy or content as determined by Teacher Certification~~

## Education Allocations

- Additional Credits
  - Uses definitions from Idaho Code 33-1004B
  - Earned beyond the degree reported and after initial certification
  - Along with the degree, must be in a relevant pedagogy or content as determined by Teacher Certification

# What is Salary Based Apportionment?



- Salary Based Apportionment is an allocation model **not** a Reimbursement model.
- Instead, it uses averages derived from your staff's career ladder or admin placements.
- These are applied to allocated FTEs that come from **Support Units**.
- **The SBA does not fund on actual FTEs nor on an individual staff member basis.**



# Staff Demographics (7)



- Instructional FTE and Salary Report

Professional Endorsed As Of Date	Advanced Professional Endorsed As Of Date	Current Career Ladder Placement	Current Base Salary	Base Salary Schoolyear	Ed Allocation BA24	Ed Allocation MA	Total (d+e+f+g)	contract FTE	cte Allocation	Allocated Salary (h x i)
7/1/2015	7/1/2020	AP1	\$52000.00	2020-2021	\$2000.00		\$54000.00	1		\$54000.00
7/1/2015	7/1/2020	AP2	\$53207.00	2021-2022	\$2000.00		\$55207.00	1		\$55207.00
7/1/2015	7/1/2020	AP2	\$53207.00	2021-2022	\$2000.00		\$55207.00	1		\$55207.00
7/1/2017		P4	\$48526.00	2021-2022	\$2000.00		\$50526.00	1		\$50526.00
7/1/2015		P5	\$50370.00	2021-2022	\$2000.00		\$52370.00	1		\$52370.00
		R3	\$41611.00	2021-2022			\$41611.00	1		\$41611.00
7/1/2018		P4	\$48526.00	2021-2022			\$48526.00	1		\$48526.00
7/1/2017		P4	\$48526.00	2021-2022		\$3500.00	\$52026.00	1		\$52026.00
7/1/2015	7/1/2020	AP2	\$53207.00	2021-2022		\$3500.00	\$56707.00	1	\$3,000.00	\$59707.00
		R2	\$40990.00	2021-2022			\$40990.00	1		\$40990.00
		R2	\$40990.00	2021-2022			\$40990.00	1		\$40990.00
7/1/2015	7/1/2020	AP2	\$53207.00	2021-2022	\$2000.00		\$55207.00	1		\$55207.00

# Staff Demographics (8)



## CTE Allocation

- Districts and Charters may receive an additional allocation for career technical education (CTE)
  - Applies to instructional staff only
  - Maximum of \$3,000 per individual
  - Must hold an **occupational specialist certificate** (OS) for which they are teaching (**NOT** a degree based CTE Certificate)
  - The allocation is prorated according to contract FTE, funding source codes (Fund 10), and assignment FTE
    - An instructor who has 0.25 FTEs with CTE assignments in Fund 10 would only generate \$750
  - The funds must be passed on to the staff member, however how you do that is a local control decision.



## Education Allocation

- In order to be eligible for an education allocation, the instructional or pupil services staff member must:
  - 1. Hold a Professional Endorsement**
    - Obtained through Teacher Certification
    - Check reports to determine if someone eligible does not have this
  - 2. Have the appropriate educational data reported**
    - BA + 24 credits = \$2,000
    - MA = \$3,500
- Only one education allocation applies at a time (e.g. you cannot have both a BA + 24 and an MA education allocation)
- Still report BA + credits if that is more beneficial on the index table
  - MA can be reported as additional degree and still count here

# Staff Demographics (10)



**Experience** - Completed certificated years of .5 FTE or more,

- 1<sup>st</sup> year = 0
  - Idaho Public K-12
  - Out of state Public K-12
  - Non-Public k-12 (accredited School)
  - Idaho Higher ED
  - Out of state Higher ED

## **Years in district**

- Number of years employed in the district in a certified position
  - 1<sup>st</sup> year

# Staff Demographics (11)



## Contracts

- Up to 3 contracts
  - Administrator, teacher, evening, summer
- Each contract
  - Cannot exceed 1 FTE
  - Assignment FTE equals contract FTE
  - Has corresponding certificated assignments
  - Has corresponding fund source code (up to 4)

# Staff Demographics (12)



## 17 Funding sources- may have up to 4

- Certificated employee
  - **c1**FundSource1
    - Only reimbursed for Fund 10 – General Fund
  - **c1**PercentSource1
- Non-Certificated employee
  - **nc**FundSource1
  - **nc**PercentSource1
    - Do not use for certified staff



# Staff Demographics (13)



## Extra Pay

- 11 Codes for special or supplemental duties not in base pay
- They determine fund source
- Roll multiple extra pay amounts into one
  - i.e. 3 coaching jobs

Code	Option Name	Option Definition
A	Extracurricular activities; e.g. coaching, debate, etc	Funded by code 10 - General Fund
F	Stipend or Bonus (paid from general funds)	Funded by code 10 - General Fund
O	Stipend or Bonus (paid from federal funds)	Funded by code 08 - Federal Fund
P	Stipend or Bonus (paid from other state funds)	Funded by code 09 - Other

# Staff Demographics (14)



## **Reports to run after submitting your data**

- All Personnel Employment Info – V6 (all funds, all staff)
- District Index (Admin Staff, fund 10 only)
- Employment Placement Report V 6 (Admin , fund 10 only)
- Instructional FTE and Salary Report (Fund 10)
- Pupil Service FTE and Salary Report (Fund 10)
- Staff Salary Summary (all funds)
- Staff Salary Summary (Fund 10)
- Staff Assignments FTE Variance – Edit Report (All Funds)

# Staff Demographics (15)



## Staff on an Alternative Authorization

- The person on an Alternative Authorization should be reported as **certificated** while the authorization/provisional or interim is being processed.
  - You will receive a warning until the application has been approved.
  - Report their application date as their certification date.
  - Report them on a contract as any other certificated employee.
  - Do not report someone else as the teacher and then go back and change it after the applicant has been approved. It is ok to report them as certified if you have applied for an alt auth, however
  - Funding may be reduced if their application is denied.



## **Calculating Non-certified rate for coaches**

- non-certificated drill team coach paid \$2,000
- Estimated time - September – March (7 months)
- five 1-hour sessions per week.
- $7 \text{ months} \times 4 \text{ weeks per month} = 28 \text{ weeks} \times 5 \text{ hours per week} = 140 \text{ hours}$
- $\$2,000 \text{ divided by } 140 \text{ hours} = \$14.29 \text{ per hour}$

# Corrections



- Corrections after December 3, 2021, must be approved by Public School Finance
  - Submit a letter signed by your Superintendent or Charter Administrator stating the special circumstances that caused the need for the revision
  - Include each specific data element to be corrected
  - Further supporting documentation may be requested
  - Last day to submit revised mid-term data is Friday, March 24, 2023
- Corrected files are not automatically uploaded and will not be reflected on payments without approval of Public School Finance



## What is a Teacher of Record (TOR)?

- Ultimately, the person responsible for the student progress/achievement (this is reflected in their evaluation)
- Plan instruction (i.e. Lesson plans)
- Deliver instruction/supervise the delivery of instruction
- Assess students formatively and summatively
- Designate the final grade
- Meet with parents if necessary



# Long Term Sub (2)



## What is a long term sub?

- A qualified individual who **temporarily** acts on behalf of a contracted certified (TOR) instructor for 10 or more consecutive days during the school year.

## Does the long term sub need to be properly endorsed for the courses they are assigned?

- No, There **should** be a properly endorsed Teacher of Record for whom they are subbing

# Long Term Sub(3)



To report a long term sub:

- Include the LTS on the Staff Demographic report
  - Report them as isCertified = N, unless they are actually on a contract.
    - isCertified = they have certified assignments, are on a contract, and all the fields applying to certified staff must be completed
- Include them on the Staff Assignment file
  - Report all assignments with FTE and the appropriate start/end dates
    - The LTS will have identical assignments as the TOR except for the start/end dates, LTS teaching role = L and the contract FTE would be 0
    - IF they happen to be on a contract, report their appropriate contract FTE for the assignments

# Long Term Sub (4)



- The SRM error has been reduced to a warning to allow a LTS to be reported without a TOR in order for the LEA to Report what may actually happening, **However:**

## **If there is no TOR associated with the LTS?**

- Then the LTS is no longer the LTS but is now functioning as the TOR and either needs to be replaced with a person who properly endorsed or possibly placed on an Alternative Authorization.
- They would need to be on a contract.
- If left unresolved, you may be in violation of Idaho Code 33-1201 and you could have funding withheld.

# Long Term Sub (5)



**IF reporting someone as the TOR for a LTS, The TOR must agree to these responsibilities.**

- Ultimately, the person responsible for the student progress/achievement (this is reflected in their evaluation)
- Planning instruction (ie. Lesson plans)
- Delivering instruction/supervising the delivery of instruction
- Assessing students formatively and summatively
- Designating the final grade
- Meeting with parents if necessary

# Finance Contacts



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# Questions?



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# *Getting Started with ISEE* **Intro To Staff Reporting**

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