Salary Based Apportionment and Benefit Apportionment

Branwyn Phillips
Financial Specialist, Sr.
• If you’re here and not on the new to ISEE track, you know the basics
• For time, I’m going to skip over some things
• For a more detailed explanation of SBA, please come to the PSF presentations at the IASBO spring workshop
• You can also contact me to talk about this individually
Staffing Dates

• **Last Friday in September** (September 30\textsuperscript{th}, 2022)
  • This is the "snapshot" for staffing data used in funding calculations

• **October 17, 2022**
  • First upload that covers period through the “snapshot” date

• **November 18, 2021**
  • Data submitted in this upload will automatically override the October upload for funding purposes

• **Friday, December 2, 2022** - Last day to submit staffing corrections automatically for the February 15, 2023 payment.
Current Year Corrections

• Corrected files are not automatically uploaded and will not be reflected on payments without approval of Public School Finance

• Corrections after December 2, 2022, 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

• Corrections after Friday, March 24, 2023 may not be reflected in the May 15th payment

• Corrections after Friday, June 16, 2023 may not be reflected until a prior year correction next February 15th!

• CLDS corrections submitted with current year evaluations before by July 1st, 2023 for the year with an expiring corrections window (19-20 this year) will be processed as part of the July 15th payment.

• Other corrections in CLDS may be included in the July 15th payment, time permitting.
Current Year Corrections (Cont.)

• All ISEE data reported should reflect how things actually were as of the last Friday in September with these exceptions:

  • Departure date/reason
  • New hires – use information as of their hiring date
  • New assignments – do not zero out or remove assignments active as of the snapshot date
  • Additional Pay – stipends paid later in the year not anticipated at the start
  • Retroactive corrections – Ex. Someone whose funding source was retroactively changed in your books
How Does ISEE Data Affect SBA Funding?
# 2022-2023 Salary Based & Benefit Apportionment - Charter School

## Basic Education Data System

### Salary Based Apportionment and Benefit Apportionment Computation

**School Year:** 2022-2023

**District:** 999 Example Charter

**District Information:**
- Administrative Staff Index: 2,01280
- Administrative Staff Index (adjusted for cap): 2,01280
- Mid-Term Support Units: 16.47

**Statewide Information:**
- Administrative Staff Index: 1.84599
- Administrative Staff Index Cap: 1.99643
- 100.00%
- PERSI plus FICA Employer Rate: 19.59%

### Staff Allowance Ratios and Apportionments

<table>
<thead>
<tr>
<th>Staff Allowance</th>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Separate Staff Allowance FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>a</td>
<td>b</td>
<td>c</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Salary Based</th>
<th>Benefit Based</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allowance</td>
<td>Allowance</td>
</tr>
<tr>
<td>FTE</td>
<td>FTE</td>
</tr>
<tr>
<td>(l x m)</td>
<td>(l x 0.599)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Salary Based</th>
<th>Total Benefit Based</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary</td>
<td>Benefit</td>
</tr>
<tr>
<td>Allowance FTE</td>
<td>Allowance FTE</td>
</tr>
<tr>
<td>(i + m)</td>
<td>(i + n)</td>
</tr>
</tbody>
</table>

### Salary Based Apportionment

- **Administration:** 0.0750, 1.23525
- **Instructional:** 1.0210, 16.81567
- **Pupil Service:** 0.0790, 1.30113
- **Noncertified:** 0.3750, 6.17625

### Benefit Apportionment

- **Administration:** 103,149.29
- **Instructional:** 790,829.95
- **Pupil Service:** 61,190.56
- **Noncertified:** 153,424.23

### Total Salary Based and Benefit Apportionment

- **Total Salary Based:** 1,108,594.02
- **Total Benefit Based:** 217,173.57

### Mid-Term Units

- **Units:**
  - Salary Based: 25.52850
  - Benefit: 25.52850

### Salary Based Apportionment

- **Total:**
  - Salary Based: 1,108,594.02
  - Benefit: 217,173.57

### Salary Based Apportionment and Benefit Apportionment

- **District Information:**
  - Administrative Staff Index: 2,01280
  - Administrative Staff Index (adjusted for cap): 2,01280
  - Mid-Term Support Units: 16.47

- **Statewide Information:**
  - Administrative Staff Index: 1.84599
  - Administrative Staff Index Cap: 1.99643
  - 100.00%
  - PERSI plus FICA Employer Rate: 19.59%
2022-2023 Salary Based & Benefit Apportionment - Charter School (Ratio)

Basic Education Data System
Salary Based Apportionment and Benefit Apportionment
Computation

School Year: 2022-2023
District 999 Example Charter

Statewide Information:
Administrative Staff Index 1.86439
Administrative Staff Index Cap 1.86643 100.00%
PERSI plus FICA Employer Rate 19.59%

District Information:
Administrative Staff Index 2.01260
Administrative Staff Index (adjusted for cap) 2.01260
Mid-Term Support Units: 16.47

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Small District Staff Allowance</th>
<th>Separate Staff Allowance</th>
<th>Adjusted Staff FTE</th>
<th>Actual Staff FTE</th>
<th>Staff Index</th>
<th>Base Salary</th>
<th>Average Salary</th>
<th>Preliminary Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FTE</td>
<td>FTE</td>
<td></td>
<td></td>
<td>FTE</td>
<td>FTE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>(Units x a)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>1.23525</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional</td>
<td>1.0210</td>
<td>16.81587</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0790</td>
<td>1.30113</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>6.17625</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Preliminary Salary Based Apportionment</th>
<th>Actual Salary</th>
<th>Salary Based Apportionment Eligible for Benefits</th>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
<th>Salary Based Apportionment Plus Allowances</th>
<th>Maximum Salary Apportionment</th>
<th>Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(h x j)</td>
<td>(l x k)</td>
<td>Smaller: n or o</td>
<td>p x 19.59%</td>
<td>(Max. 15%)</td>
<td></td>
<td></td>
<td></td>
<td>(Col. n)</td>
</tr>
<tr>
<td></td>
<td>m</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>103,149.29</td>
<td>100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>103,149.29</td>
</tr>
<tr>
<td>Instructional</td>
<td>780,829.95</td>
<td>797,597.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>790,829.95</td>
</tr>
<tr>
<td>Pupil Service</td>
<td>61,190.56</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>61,190.56</td>
</tr>
<tr>
<td>Noncertified</td>
<td>153,424.23</td>
<td>153,424.23</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>153,424.23</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1,108,594.02</td>
<td>1,128,100.40</td>
<td>1,108,594.02</td>
<td>217,173.57</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,108,594.02</td>
</tr>
</tbody>
</table>
### 2022-2023 Salary Based & Benefit Apportionment – District (Ratio)

#### District 999 Example District

<table>
<thead>
<tr>
<th>Statewide Information:</th>
<th></th>
<th>District Information:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff Index:</td>
<td>0.0000</td>
<td>Administrative Staff Index:</td>
<td>1.92725</td>
</tr>
<tr>
<td>Administrative Staff Index Cap:</td>
<td>1.86643</td>
<td>100.00%</td>
<td>Administrative Staff Index (adjusted for cap):</td>
</tr>
<tr>
<td>rastered:</td>
<td>19.06%</td>
<td>77.12:</td>
<td>Mid-Term Support Limits:</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Staff Allowance Ratio

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>FTE</th>
<th>&lt;40 units</th>
<th>40-50 FTE</th>
<th>&gt;50 FTE</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administration</strong></td>
<td>0.0750</td>
<td>5.78400</td>
<td>0.00000</td>
<td>5.78400</td>
<td>5.78400</td>
</tr>
<tr>
<td><strong>Instructional</strong></td>
<td>1.0219</td>
<td>78.73952</td>
<td>0.00000</td>
<td>78.73952</td>
<td>78.73952</td>
</tr>
<tr>
<td><strong>Pupil Service</strong></td>
<td>0.0790</td>
<td>6.09248</td>
<td>0.00000</td>
<td>6.09248</td>
<td>6.09248</td>
</tr>
<tr>
<td><strong>Subtotal Instructional and Pupil Service</strong></td>
<td></td>
<td>84.83200</td>
<td>0.00000</td>
<td>84.83200</td>
<td>84.83200</td>
</tr>
<tr>
<td><strong>Noncertified</strong></td>
<td>0.3750</td>
<td>28.92000</td>
<td>0.00000</td>
<td>28.92000</td>
<td>28.92000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>119.53600</td>
<td>107.08640</td>
<td>111.57835</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Salary Based Apportionment

<table>
<thead>
<tr>
<th>Noncertified Preliminary Salary Based Apportionment</th>
<th>Base Salary</th>
<th>Benefit Apportionment</th>
<th>Salary Based Apportionment Plus Allowances</th>
<th>Maximum Salary Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td>(h x i) x (j / k)</td>
<td>m</td>
<td>n</td>
<td>o</td>
<td>p x 19.56%</td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td>462,509.06</td>
<td>381,309.90</td>
<td></td>
<td>3,578,120.79</td>
</tr>
<tr>
<td><strong>Instructional</strong></td>
<td>3,628,991.60</td>
<td>3,451,919.60</td>
<td></td>
<td>3,872,217.74</td>
</tr>
<tr>
<td><strong>Pupil Service</strong></td>
<td>256,268.44</td>
<td>233,789.50</td>
<td></td>
<td>297,996.91</td>
</tr>
<tr>
<td><strong>Subtotal Instructional and Pupil Service</strong></td>
<td>3,804,241.31</td>
<td>3,665,709.10</td>
<td></td>
<td>3,805,164.51</td>
</tr>
<tr>
<td><strong>Noncertified</strong></td>
<td>718,401.72</td>
<td>811,219.86</td>
<td></td>
<td>718,401.72</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>4,585,152.08</td>
<td>4,656,238.66</td>
<td></td>
<td>5,054,568.48</td>
</tr>
</tbody>
</table>
Salary Based Apportionment Formula Factors

- **Staff Allowance Ratios** - Ratios for each of the four staff categories. Staff ratios establish the number of staff positions to be funded by each support unit (I.C. 33-1004).

For every one support unit, the state funds to the district/charter:

1. **.075 Administrative Staff (certificated)**
   Examples: Superintendent, Charter Administrator, Principal, Curriculum Director, Special Education Director, etc. (40000 series assignment codes)

2. **1.021 Instructional Staff (certificated)**
   Teachers, Librarians (00001 – 31999, 33000, 50000-72999 assignment codes)

3. **.079 Pupil Services Staff (certificated)**
   Examples: Counselor, School Nurse, School Psychologist (32000 series assignment codes)

4. **.375 Classified Staff (non-certificated)**
   Examples: Business Managers, Instructional Aides, Office Support, Custodial Care, IT Support, etc. (90000 series assignment codes)
# 2022-2023 Salary Based & Benefit Apportionment - Charter School (Index)

## Basic Education Data System

### Salary Based Apportionment and Benefit Apportionment - Charter School (Index)

**School Year:** 2022-2023

**District:** 999  Example Charter

### Statewide Information:
- Administrative Staff Index: 1.84399
- Administrative Staff Index Cap: 1.89643 (100.00%)
- PERSI plus PICA Employer Rate: 19.99%

### District Information:
- Administrative Staff Index: 2.01260
- Administrative Staff Index (adjusted for cap): 2.01260
- Mid-Term Support Units: 16.47

### Table

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Separate Sec. School Allallowance FTE</th>
<th>Adjusted Staff FTE</th>
<th>Actual Staff FTE</th>
<th>Staff Index</th>
<th>Base Salary</th>
<th>Average Salary</th>
<th>Certified Preliminary Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>b</td>
<td>c</td>
<td>d</td>
<td>e</td>
<td>f</td>
<td>g</td>
<td>h</td>
<td>i</td>
</tr>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>1.23525</td>
<td></td>
<td></td>
<td>1.3525</td>
<td>1.0000</td>
<td>1.3525</td>
<td>2.01260</td>
</tr>
<tr>
<td>Instructional</td>
<td>1.0210</td>
<td>16.81587</td>
<td></td>
<td></td>
<td>16.81587</td>
<td>14.0000</td>
<td>16.81587</td>
<td>79,029.95</td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0790</td>
<td>1.30113</td>
<td></td>
<td></td>
<td>1.30113</td>
<td>0.0000</td>
<td>1.30113</td>
<td>47,028.79</td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>6.17625</td>
<td></td>
<td></td>
<td>6.17625</td>
<td>6.870000</td>
<td>6.17625</td>
<td>24,841.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25,528.50</td>
</tr>
</tbody>
</table>

### Noncertified Preliminary Salary Based Apportionment

<table>
<thead>
<tr>
<th>Preliminary Salary Based Apportionment</th>
<th>Actual Salary</th>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
<th>Salary Based Apportionment Plus Allowances</th>
<th>Maximum Salary Apportionment</th>
<th>Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td>(n x j) m</td>
<td>n</td>
<td>o</td>
<td>p x 19.59%</td>
<td></td>
<td>q</td>
<td>r</td>
<td>s</td>
</tr>
<tr>
<td>Administration</td>
<td>103,149.29</td>
<td>100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional</td>
<td>790,829.95</td>
<td>797,587.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td>61,190.56</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>153,424.23</td>
<td>230,503.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>1,106,594.02</td>
<td>1,128,100.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,106,594.02</td>
</tr>
</tbody>
</table>

### Notes
- The table above shows the apportionment details for the salary based and benefit apportionment for the 2022-2023 school year.
- The calculations involve various factors including administrative and instructional staff indices, pupil service rates, and noncertified rates.
- The base salary and average salary are calculated based on these indices.
- The certified preliminary salary based apportionment totals 25,528.50.
- Noncertified preliminary salary based apportionment details are also provided, showing the breakdown by category.
# 2022-2023 Salary Based & Benefit Apportionment – District (Index)

School Year: 2022-2023

### District Information:
- Administrative Staff Index: 1.92725
- Administrative Staff Index (adjusted for cap): 1.92725
- Mid-Term Support Units: 77.12
- Instructional / Pupil Service Staffing Percent: 4.5%

### Statewide Information:
- Administrative Staff Index: 0.00000
- Administrative Staff Index Cap: 1.00000
- PERSI plus FICA Employer Rate: 19.55%

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Small District Staff Allowance FTE</th>
<th>Separate Sec. School Allowance FTE</th>
<th>Adjusted Staff Allowance FTE</th>
<th>Actual Staff Allowance FTE</th>
<th>Staff Base Salary</th>
<th>Average Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>a (Units x a)</td>
<td>b</td>
<td>c</td>
<td>d</td>
<td>e</td>
<td>f</td>
<td>g</td>
<td>h</td>
</tr>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>5.78400</td>
<td>0.00000</td>
<td>0.00000</td>
<td>0.00000</td>
<td>5.78400</td>
<td>4.26000</td>
</tr>
<tr>
<td>Instructional</td>
<td>1.0210</td>
<td>78.73552</td>
<td>0.00000</td>
<td>0.00000</td>
<td>0.00000</td>
<td>78.73552</td>
<td>69.54000</td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0790</td>
<td>6.09248</td>
<td>0.00000</td>
<td>0.00000</td>
<td>0.00000</td>
<td>6.09248</td>
<td>3.97500</td>
</tr>
<tr>
<td>Subtotal Instructional and Pupil Service</td>
<td>94.83200</td>
<td>73.41500</td>
<td>78.97435</td>
<td>78.97435</td>
<td>53.47903</td>
<td>296,256.44</td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>26.02000</td>
<td>0.00000</td>
<td>0.00000</td>
<td>0.00000</td>
<td>26.02000</td>
<td>26.41040</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>119.53800</td>
<td>107.08640</td>
<td>111.57835</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Salary Based Apportionment

<table>
<thead>
<tr>
<th>Noncertified Preliminary Salary Based Apportionment [(h x j) / m]</th>
<th>Preliminary Salary Based Apportionment</th>
<th>Actual Salary</th>
<th>Salary Based Apportionment Eligible for Benefits</th>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>( (i + m) / n ) ( x 19.59% ) ( p ) ( q ) ( r ) ( s ) | ( t ) | ( u ) | ( v )</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>482,509.08</td>
<td>381,309.90</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional</td>
<td>3,508,984.97</td>
<td>3,431,918.60</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td>296,256.44</td>
<td>233,789.56</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal Instructional and Pupil Service</td>
<td>3,804,241.31</td>
<td>3,865,708.10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>718,401.72</td>
<td>811,219.68</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>4,965,162.09</td>
<td>4,868,258.88</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Salary Based Apportionment and Benefit Apportionment | 13
## I.C. §33-1004A Experience and Multiplier Table

### ADMINISTRATIVE INDEX 2022-2023

<table>
<thead>
<tr>
<th>Year</th>
<th>BA</th>
<th>BA+12</th>
<th>BA+24</th>
<th>MA+12 BA+36</th>
<th>MA+12 BA+48</th>
<th>MA+24 BA+60</th>
<th>MA+36 ES/DR</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1.00000</td>
<td>1.03750</td>
<td>1.07640</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
</tr>
<tr>
<td>1</td>
<td>1.03750</td>
<td>1.07640</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
</tr>
<tr>
<td>2</td>
<td>1.07640</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
</tr>
<tr>
<td>3</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
<td>1.39290</td>
</tr>
<tr>
<td>4</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
<td>1.39290</td>
<td>1.44510</td>
</tr>
<tr>
<td>5</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
<td>1.39290</td>
<td>1.44510</td>
<td>1.49930</td>
</tr>
<tr>
<td>6</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
<td>1.39290</td>
<td>1.44510</td>
<td>1.49930</td>
<td>1.55550</td>
</tr>
<tr>
<td>7</td>
<td>1.29410</td>
<td>1.34260</td>
<td>1.39290</td>
<td>1.44510</td>
<td>1.49930</td>
<td>1.55550</td>
<td>1.61380</td>
</tr>
<tr>
<td>8</td>
<td>1.34260</td>
<td>1.39290</td>
<td>1.44510</td>
<td>1.49930</td>
<td>1.55550</td>
<td>1.61380</td>
<td>1.67430</td>
</tr>
<tr>
<td>9</td>
<td>1.39290</td>
<td>1.44510</td>
<td>1.49930</td>
<td>1.55550</td>
<td>1.61380</td>
<td>1.67430</td>
<td>1.73710</td>
</tr>
<tr>
<td>10</td>
<td>1.39290</td>
<td>1.49930</td>
<td>1.55550</td>
<td>1.61380</td>
<td>1.73710</td>
<td>1.80220</td>
<td>1.86980</td>
</tr>
<tr>
<td>11</td>
<td>1.39290</td>
<td>1.49930</td>
<td>1.55550</td>
<td>1.61380</td>
<td>1.73710</td>
<td>1.80220</td>
<td>1.86980</td>
</tr>
<tr>
<td>12</td>
<td>1.39290</td>
<td>1.49930</td>
<td>1.55550</td>
<td>1.61380</td>
<td>1.73710</td>
<td>1.80220</td>
<td>1.86980</td>
</tr>
<tr>
<td>13+</td>
<td>1.39290</td>
<td>1.49930</td>
<td>1.55550</td>
<td>1.61380</td>
<td>1.73710</td>
<td>1.80220</td>
<td>2.01260</td>
</tr>
</tbody>
</table>

- Only used for administrative staff
- Factored Index = Total Pro-Rated Factor/Total FTE
Index Experience

- Use information as of the last Friday in September

- Prior years of experience are placed in five categories:
  1. Idaho Public K-12
  2. Public K-12 Outside Idaho
  3. Accredited Private or Parochial K-12
  4. Accredited Idaho College or University (05-06 SY or later)
     - Experience must be equivalent to the K-12 instruction environment
  5. Accredited College or University Outside Idaho (05-06 SY or later)
     - Experience must be equivalent to the K-12 instruction environment

- K-12 experience must be under a certificated contract to be counted
  - Includes administrative, instructional, and pupil services experience
Admin Index Experience (Cont.)

• Uses actual number of **prior** years of experience
  • **Do not count the current year**
  • Experience increases **after** the school year is over
  • Staff in their first year ever holding a certificated contract would report as 0

• Experience is counted in whole years only
  • 0.50 eligible FTE or more = 1 year
  • Less than 0.50 eligible FTE is not counted
  • Each year is considered separately
  • Partial years cannot be combined

• **Be Careful**
  • Check what you’ve reported in recent years and make sure everything makes sense
Admin Index Education

• Degree
  • Highest Degree claimed for funding
  • May not be highest degree obtained

• Initial certification
  • Issue date of the first certificate (may be outside Idaho or after BA)

• Additional Credits
  • Earned beyond the degree reported and after initial certification
  • Accredited college transcript credits only
    • Must be in a relevant pedagogy or content as determined by Teacher Certification
  • Reported in semester credit hours only
  • Do not report in-service credits

• Education must reflect the last Friday in September
  • Do not update degrees and credits earned in the current year in ISEE as this may cause errors
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

<table>
<thead>
<tr>
<th>Year</th>
<th>BA</th>
<th>BA+12</th>
<th>BA+24</th>
<th>BA+36</th>
<th>BA+48</th>
<th>BA+60</th>
<th>ES/DR</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1.00000</td>
<td>1.03750</td>
<td>1.07640</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
</tr>
<tr>
<td>1</td>
<td>1.03760</td>
<td>1.07640</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
</tr>
<tr>
<td>2</td>
<td>1.07640</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
</tr>
<tr>
<td>3</td>
<td>1.11680</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
<td>1.39290</td>
</tr>
<tr>
<td>4</td>
<td>1.15870</td>
<td>1.20220</td>
<td>1.24730</td>
<td>1.29410</td>
<td>1.34260</td>
<td>1.39290</td>
<td>1.44510</td>
</tr>
</tbody>
</table>

If also instructional or pupil services, MA would be reported as second degree to receive Education Allocations
## 2022-2023 Salary Based & Benefit Apportionment - Charter School (Base Salaries)

### Basic Education Data System
Salary Based Apportionment and Benefit Apportionment
Computation

**School Year:** 2022-2023

**District:** 999 Example Charter

**Statewide Information:**
- Administrative Staff Index: 1.84399
- Administrative Staff Index Cap: 1.89943
- PERSI plus PICA Employer Rate: 19.99%

**District Information:**
- Administrative Staff Index: 2.01260
- Administrative Staff Index (adjusted for cap): 2.01260
- Mid-Term Support Units: 16.47

### Salary Based Apportionment and Benefit Apportionment

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>&lt; 40 units</th>
<th>&lt; 20 units</th>
<th>Separate Sec. School</th>
<th>Adjusted Staff Allowance FTE</th>
<th>Actual Staff Allowance FTE</th>
<th>Staff Index</th>
<th>Base Salary</th>
<th>Average Salary</th>
<th>Certified Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>b</td>
<td>c</td>
<td>d</td>
<td>e</td>
<td>f</td>
<td>g</td>
<td>h</td>
<td>i</td>
<td>j</td>
<td>k</td>
</tr>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>1.336300</td>
<td>1.23525</td>
<td>1.000000</td>
<td>1.23525</td>
<td>2.01260</td>
<td>41,491.00</td>
<td>83,504.79</td>
<td>103,149.29</td>
<td>0.000000</td>
</tr>
<tr>
<td>Instructional</td>
<td>1.0210</td>
<td>16.81567</td>
<td>14.000000</td>
<td>16.81567</td>
<td>16.81567</td>
<td>16.81567</td>
<td>790,829.95</td>
<td>790,829.95</td>
<td>790,829.95</td>
<td>790,829.95</td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0790</td>
<td>1.30113</td>
<td>0.000000</td>
<td>1.30113</td>
<td>1.30113</td>
<td>0.000000</td>
<td>47,028.79</td>
<td>47,028.79</td>
<td>47,028.79</td>
<td>61,190.56</td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>6.17625</td>
<td>6.17625</td>
<td>6.17625</td>
<td>6.17625</td>
<td>6.17625</td>
<td>24,841.00</td>
<td>24,841.00</td>
<td>24,841.00</td>
<td>24,841.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25,2850</td>
<td>23,6700</td>
<td>25,2850</td>
<td>25,2850</td>
</tr>
</tbody>
</table>

### Benefit Apportionment

<table>
<thead>
<tr>
<th>Noncertified Preliminary Salary Based Apportionment (n x m)</th>
<th>Preliminary Salary Based Apportionment</th>
<th>Actual Salary</th>
<th>Salary Based Apportionment Eligible for Benefits Smaller: n or o</th>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
<th>Salary Based Apportionment Plus Allowances</th>
<th>Maximum Salary Apportionment</th>
<th>Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(n x m)</td>
<td></td>
<td>p x 19.59%</td>
<td>(Max 15%)</td>
<td>r</td>
<td>s</td>
<td>t</td>
<td>v</td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>103,149.29</td>
<td>100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional</td>
<td>790,829.95</td>
<td>797,567.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td>61,190.56</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>153,424.23</td>
<td>230,503.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>1,106,594.02</td>
<td>1,128,100.40</td>
<td>1,108,594.02</td>
<td>217,173.57</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,106,594.02</td>
</tr>
</tbody>
</table>
# 2022-2023 Salary Based & Benefit Apportionment – District (Base Salaries)

## School Year: 2022-2023

### District: 999 Example District

#### Statewide Information:
- Administrative Staff Index: 0.00000
- Administrative Staff Index Cap: 1.89643
- PERSI plus FICA Employer Rate: 19.50%

#### District Information:
- Administrative Staff Index: 1.92725
- Administrative Staff Index (adjusted for cap): 1.92725
- Mid-Term Support Units: 77.12
- Instructional/Pupil Service Staffing Percent: 4.5%

### Staff Allocation Ratios

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Small District Staff Allowance</th>
<th>Separate Staff Allowance</th>
<th>Adjusted Staff Allowance</th>
<th>Actual FTE</th>
<th>Staff Allowance FTE</th>
<th>Staff Index</th>
<th>Base Salary</th>
<th>Average Salary</th>
<th>Certified Preliminary Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2022</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Winter 2023</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
<td>1.0</td>
</tr>
</tbody>
</table>

### Noncertified Staff

- **Noncertified Salary Based Apportionment:**
  - Preliminary Salary Based Apportionment: 462,509.06
  - Actual Salary: 381,309.00
  - Salary Based Apportionment Eligible for Benefits: 34,923.20
  - Benefit Apportionment: 34,923.20
  - Virtual Allowance: 0.00
  - Ancillary Allowance: 0.00
  - Salary Based Apportionment Plus Allowances: 34,923.20
  - Maximum Salary Apportionment: 34,923.20

- **Noncertified Salary Based Apportionment:**
  - Preliminary Salary Based Apportionment: 718,401.72
  - Actual Salary: 689,311.66
  - Salary Based Apportionment Eligible for Benefits: 34,923.20
  - Benefit Apportionment: 34,923.20
  - Virtual Allowance: 0.00
  - Ancillary Allowance: 0.00
  - Salary Based Apportionment Plus Allowances: 34,923.20
  - Maximum Salary Apportionment: 34,923.20

### TOTAL

- **TOTAL Salary Based Apportionment:**
  - Preliminary Salary Based Apportionment: 1,184,910.78
  - Actual Salary: 1,060,620.66
  - Salary Based Apportionment Eligible for Benefits: 69,846.40
  - Benefit Apportionment: 69,846.40
  - Virtual Allowance: 0.00
  - Ancillary Allowance: 0.00
  - Salary Based Apportionment Plus Allowances: 69,846.40
  - Maximum Salary Apportionment: 69,846.40

---

**Salary Based Apportionment and Benefit Apportionment | 20**
### 2022-2023 Salary Based & Benefit Apportionment - Charter School (Calculated Salaries)

<table>
<thead>
<tr>
<th></th>
<th>District 999 Example Charter</th>
<th>District Information:</th>
<th>2021-2022</th>
<th>Basic Education Data System</th>
<th>Salary Based Apportionment and Benefit Apportionment</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff Index</td>
<td>1.84399</td>
<td>Administrative Staff Index</td>
<td>2.01260</td>
<td>Salary Based Apportionment and Benefit Apportionment</td>
<td>Calculation</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff Index Cap</td>
<td>1.88543 100.00%</td>
<td>Administrative Staff Index (adjusted for cap)</td>
<td>2.01260</td>
<td>Salary Based Apportionment and Benefit Apportionment</td>
<td>Calculation</td>
<td></td>
</tr>
<tr>
<td>PERSI plus FICA Employer Rate</td>
<td>19.99%</td>
<td>Mid-Term Support Units:</td>
<td>16.47</td>
<td>Salary Based Apportionment and Benefit Apportionment</td>
<td>Calculation</td>
<td></td>
</tr>
</tbody>
</table>

### Staff Allowance Calculation

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Separate Sec. School Allowance FTE</th>
<th>Adjusted Staff FTE</th>
<th>Actual FTE</th>
<th>Staff Index</th>
<th>Base Salary</th>
<th>Certified Preliminary Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>a</td>
<td>b</td>
<td>c</td>
<td>d</td>
<td>e</td>
<td>f</td>
<td>g h i j k l</td>
</tr>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>1.23525</td>
<td></td>
<td>1.35525</td>
<td>1.00000</td>
<td>1.35525</td>
<td>2.01260 41,491.00</td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0790</td>
<td>1.30113</td>
<td></td>
<td>1.30113</td>
<td>0.00000</td>
<td>1.30113</td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>6.17625</td>
<td></td>
<td>6.17625</td>
<td>8.67000</td>
<td>6.17625</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25.5285 23.6700 25.5285</td>
</tr>
</tbody>
</table>

### Salary Based Apportionment

<table>
<thead>
<tr>
<th>Noncertified Preliminary Salary Based Apportionment (h x j)</th>
<th>Preliminary Salary Based Apportionment</th>
<th>Actual Salary</th>
<th>Salary Based Apportionment</th>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
<th>Salary Based Apportionment Plus Allowances</th>
<th>Maximum Salary Apportionment</th>
<th>Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(i + m)</td>
<td>n</td>
<td>o</td>
<td>p x 19.59%</td>
<td>q</td>
<td>r s t u</td>
<td>v</td>
<td>col (n)</td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>103,149.29</td>
<td>100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>103,149.29</td>
<td></td>
</tr>
<tr>
<td>Instructional</td>
<td>790,829.95</td>
<td>797,597.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>790,829.95</td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td>61,190.56</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>61,190.56</td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>153,424.23</td>
<td>153,424.23</td>
<td>230,503.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>153,424.23</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>1,106,594.02</td>
<td>1,128,100.40</td>
<td>1,108,594.02</td>
<td>217,173.57</td>
<td></td>
<td></td>
<td></td>
<td>1,106,594.02</td>
<td></td>
</tr>
</tbody>
</table>
## 2022-2023 Salary Based & Benefit Apportionment – District (Average Salary)

### Staff Information:
- **District**: 999 Example District
- **School Year**: 2022-2023

### District Information:
- Administrative Staff Index: 1.92725
- Administrative Staff Index (adjusted for cap): 1.92725
- Mid-Term Support Units: 77.12
- Instructional / Pupil Service Staffing Percent: 4.5%

### Staff Allowance Ratios

<table>
<thead>
<tr>
<th>Staff</th>
<th>Allowance FTE</th>
<th>Separate School Allowance FTE (b + c + d + e)</th>
<th>Actual FTE</th>
<th>Staff Index Salary</th>
<th>Average Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Units x a)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td>0.0750</td>
<td>5.78400</td>
<td>4.36000</td>
<td>5.78400</td>
<td>1.92725</td>
</tr>
<tr>
<td><strong>Instructional</strong></td>
<td>1.0210</td>
<td>78.73562</td>
<td>71.35337</td>
<td>3,568,964.87</td>
<td></td>
</tr>
<tr>
<td><strong>Pupil Service</strong></td>
<td>0.0790</td>
<td>6.06048</td>
<td>5.2098</td>
<td>53,479.03</td>
<td>265,256.44</td>
</tr>
<tr>
<td><strong>Subtotal Instructional and Pupil Service</strong></td>
<td>84.8230</td>
<td>73.41000</td>
<td>78,974.55</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Noncertified</strong></td>
<td>0.3750</td>
<td>28.62000</td>
<td>28.92000</td>
<td>24,841.00</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>119.53600</td>
<td>107.08540</td>
<td>111,578.35</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Salary & Benefit Apportionment

<table>
<thead>
<tr>
<th>Salary Based Apportionment</th>
<th>Benefit Apportionment</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preliminary Salary Based Apportionment</td>
<td>Benefit of (a/Staff)</td>
<td>$462,509.06</td>
</tr>
<tr>
<td>Actual Salary</td>
<td>381,308.60</td>
<td></td>
</tr>
<tr>
<td>Salary Based Apportionment Eligible for Benefits</td>
<td>3,431,919.60</td>
<td></td>
</tr>
<tr>
<td>Virtual Allowance</td>
<td>34,623.20</td>
<td></td>
</tr>
<tr>
<td>Ancillary Allowance</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Salary Based Apportionment Plus Allowances</td>
<td>3,676,120.78</td>
<td></td>
</tr>
<tr>
<td>Maximum Salary Apportionment</td>
<td>3,719,517.74</td>
<td></td>
</tr>
<tr>
<td>Salary Based Apportionment Plus Allowances</td>
<td>3,830,194.51</td>
<td></td>
</tr>
</tbody>
</table>

**Salary Based Apportionment and Benefit Apportionment**
1. **Administrative Staff Average Salary**
   
   Experience/Education Index × Base Salary = Average Administrative Salary.

2. **Instructional Staff Average Salary** I.C. 33-1004E (1)
   
   \[
   \frac{(\text{Education Allocations} + \text{CTE Allocations} + \text{Career Ladder Amounts})}{\text{Total Instructional FTE}} = \text{Weighted Average Salary}
   \]

3. **Pupil Services Staff Average Salary** I.C. 33-1004E (1)
   
   \[
   \frac{(\text{Education Allocations} + \text{Career Ladder Amounts})}{\text{Total Pupil Services FTE}} = \text{Weighted Average Salary}
   \]
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
   - Those who are newer to Idaho public K-12 with prior experience may not be caught automatically

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
• While similar, the rules on what credits to count are different than those for admin staff

• Additional Credits
  • Earned beyond the degree reported and after initial certification
  • Accredited college transcript credits only
  • Must be in a relevant pedagogy or content as determined by Teacher Certification
  • Reported in semester credit hours only
  • Do not report in-service credits

• This is an ongoing issue from last year

• Teacher Certification is in the process of creating a system to allow for reporting this information one time instead of with every ISEE upload
Obtaining Professional or Advanced Professional Endorsements

• This is a **separate** process that, where possible should be begun **before** creating/submitting the Form 10

PE and APE Forms
• For staff with in-state experience only
• For staff with out-of-state experience only
• For staff with in-state and out-of-state experience

https://www.sde.idaho.gov/cert-psc/cert/pe-ape/
PE/APE Contact

• Consult the Teacher Certification website, or contact Helen Henderson in Teacher Certification

• Email: professionalendorsements@sde.idaho.gov

• Certification Phone: 208.332.6882, option 5
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 past on to CTE staff in addition to any base salary, however how you do that is a local control decision.
Career Ladder Placement for CTE under and OS Certificate

• Idaho Code 33-1004B(6) allows for CTE staff to be placed based on industry experience in fields relevant to what they are teaching

• Experience is determined by CTE as part of their certification process

• 2-3 years = R2
• 4-5 Years = R3
• 6-7 Years = P1
• 8+ Years = P2

• This process does not issue or change the requirements for PEs or APEs
• Non-CTE staff with no prior Idaho Career Ladder placement:
  • First work with Teacher Certification on PE/APEs (where applicable)
    • Advanced Professional Endorsement (APE) Starts at AP1
    • Professional Endorsement (PE) starts at P1
    • If neither is obtained, they will be placed as an R1

• BUT...
HB 656 was passed last session creating Idaho Code a new 33-1004B(7)

- Allows for initial placement based on prior certificated K-12 employee experience
- Can be used for prior Idaho employees who have never been on the Career Ladder yet
- This is Not retroactive
  - Anyone placed in 20-21 or 21-22 based on the R1, P1, AP1 only model will continue to move normally from that original placement
• First, work with Helen Henderson in Teacher Certification to obtain a PE or APE
  • This determines which rung an individual will start with
• Next, fill out a Form 10 to record any prior years in which they met equivalent Professional Rung performance criteria
  • This should be done for anyone who met equivalent professional rung performance criteria within the last 5 years, even if they are not yet eligible for a PE/APE or this placement process
    • This helps record such data for future movement
New Form 10 (Cont.)

• Includes automated fields to avoid duplicate data
• Has space for 32 possible individuals (if significantly more needed, contact me)
• Greys out fields until something is entered or selected that will require them
  • EDUID **must** be entered before any other fields are available
    • **If an EDUID is not available, hold off on the Form 10 until one is**
• Handles new placement and allowable evaluations as passed under HB 656 in FY22
  • Is more detailed (and long) but limits input to hopefully avoid errors/confusion
• Can estimate placement **based on the information provided on the form**
  • If information is in error, the placement may change
  • Estimates for those previously on the Idaho Career Ladder are not possible yet
  • This a new feature trying to make a complex process into formulas in the background
    • Treat these as VERY preliminary until this has been field tested significantly and double checked
• **DRAFTS** are available for those who want to fill a version out while we wait for clarification on placement for those with “gap years”
  
  • Fields may be changed or added before finalized
  
  • I will help convert what I can for you if that happens
  
  • Only tested in depth on my work computer, so may include things some versions of Excel can’t handle
• Submitted for placement of instructional/pupil service staff not previously on the Idaho Career Ladder, but with prior appropriate K-12 experience

• **ALSO** submitted to record performance criteria for:
  • Time outside Idaho public K-12
  • Time inside Idaho public K-12 as an administrator

• Should be submitted early in the year if possible.

• **Superintendent/Charter Administrator must sign document for performance criteria outside Idaho public K-12**
Feedback is Appreciated!

• **Please** let me know if something is missing, too complex, seems broken/inaccurate, is rejected by your version of Excel, etc.

• I **want** this to be something *helpful* for everyone that decreases common errors and records things more precisely to cover current code as well as hopefully future changes

• I **do not want** to make something that looks flashy, but is more of a pain to use than it’s worth, or which doesn’t work for less than the vast majority of locations
Professional Compensation Rung Performance Criteria

• Idaho Code 33-1001(20)(a):

(i) An overall rating of proficient or higher, and no components rated as unsatisfactory, on the state framework for teaching evaluation or equivalent for pupil service staff or principal or other school level administrator evaluation aligned to the state framework for teaching evaluation; and

(ii) Demonstrating the majority of students have met measurable student achievement targets or student success indicator targets.
• Idaho Code 33-1001(20)(b):

(i) An overall rating of proficient or higher, no components rated as unsatisfactory or basic, and rated as distinguished overall in domain two — classroom environment or domain three — instruction and use of assessment on the state framework for teaching evaluation or equivalent for pupil service staff or principal or other school level administrator evaluation aligned to the state framework for teaching evaluation; and

(ii) Demonstrating seventy-five percent (75%) or more of their students have met their measurable student achievement targets or student success indicator targets.
Performance Criteria Notes

• Per the Office of the State Board of Education:
  • A year without an Idaho evaluation/student data defaults to not meeting criteria
    • Be sure to both enter and certify this data each year in CLDS
    • Failure to do so will delay ladder movement both for you and any associated hiring districts, affecting funding
  • Evaluations/student data outside Idaho public K-12 may be used where applicable, provided the hiring district/charter certify they believe them to be equivalent to Idaho standards
    • District Superintendent/Charter Administrator must sign off that this is accurate when forms requesting placement are submitted
First CL Placement with Prior Experience (Cont. III)

• Those you have obtained a PE for with exactly 4 years of prior experience
  • Must meet all three professional rung performance criteria in at least two of the last four years (18-19, 19-20, 20-21, and/or 21-22)

• Those you have obtained a PE for with more than 4 years of prior experience
  • Must meet all three professional rung performance criteria in at least three of the last five years (17-18, 18-19, 19-20, 20-21 and/or 21-22)
  • One of these years must be in the prior two years

• Placement is then evaluated along the appropriate rung using experience in a similar way to the CTE placement method
  • Must be K-12 experience as an at least 0.5 FTE employee within a year of some combination of school districts, charter schools, or accredited private/parochial schools, while certificated for their assignments and in the location they are working
First CL Placement with Prior Experience (Cont. IV)

• With a PE:
  • 4 years of prior **completed** experience = P2
  • 5 years of prior **completed** experience = P3
  • 6 years of prior **completed** experience = P4
  • 7+ years of prior **completed** experience = P5

• With APE:
  • 9 years of prior **completed** experience = AP2
  • 10+ years of prior **completed** experience = AP3
  • FY24 11+ years of prior **completed** experience = AP4
  • FY25 12+ years of prior **completed** experience = AP5
Where are the other cells?

• P1 and AP1 only require holding a PE or APE respectively
  • There’s no additional placement requirements, so it’s outside the new placement options

• R2s and R3s were not given placement options, so R1 is the only placement for someone without a PE or APE

• With prior experience however, they will likely meet the requirements for a PE before their 3rd year and will skip over at that time
Movement into 22-23 (Residency Rung)

- I.C. 33-1004B (1)

- **21-22 R1s and R2s**
  - Advance one cell if they previously held a certificated contract at that cell

- **21-22 R3s**
  - Advance to P1 if they held a certificated contract at that cell and hold a professional endorsement in 22-23
  - Those without a professional endorsement remain an R3 at FY23 funding levels (this is different from the professional rung below)
22-23 Career Ladder Advancement (Professional Rung)

- Anyone who is issued a PE while on the residency rung automatically becomes a P1 that year

- Moving from 21-22 into 22-23
  - **Those on the Professional Rung with exactly 4 years of experience**
    - Advance one cell if they held a certificated contract at their prior cell and met all three professional rung performance criteria in at least two of the last four years (18-19, 19-20, 20-21, and/or 21-22)
  - **Others on the Professional Rung with more than 4 years**
    - Advance one cell if they held a certificated contract at their prior cell and met all three professional rung performance criteria in at least three of the last five years (17-18, 18-19, 19-20, 20-21 and/or 21-22)
    - One of these years must be in the prior two years.
  - **Those on the Professional Rung with less than 4 years**
    - Must wait until after the 4th year, regardless of how many years they met criteria
• Individuals who did not meet all three performance criteria in the required number of years will not advance, and will be funded at the prior year funding levels instead of FY23 (this includes applicable education allocations)

• If an individual was already held and had continued to be held, they would still be at the original funding levels at which they last met criteria

• **P5s must also meet these requirements or remain funded at prior year levels**
22-23 Career Ladder Advancement (Advanced Professional Rung)

• Moving from 21-22 into 22-23
  • Must have met performance criteria for Advanced Professional Rung in the prior year in order to advance.
  • Otherwise will remain at prior year placement and funding including education allocations where applicable.
  • Individuals cannot move backward on the career ladder unless they were placed incorrectly.
  • Criteria for movement on the AP rung is different than those used for the P rung, meaning you may see a higher proportion of individuals held on AP cells than on P cells.
Career Ladder Data System Application

• How Idaho public K-12 evaluation and student achievement data is sent to SDE
• Managed by Educator Effectiveness group
• Questions on application, evaluations, student data
  • Contact Kathy Gauby (208) 332-6891
  • KGauby@SDE.idaho.gov
When Does Movement Occur?

• Directly after a year ends, or only once a person has returned?

• We have met with Office of the State Board of Education policy staff on this and are still working on a definitive answer

• This effects:
  • Placement for those on the P or AP rungs with gaps in Idaho public K-12 experience in the prior 5 years
  • When the rollover process can begin for all existing staff
    • This was why movement was so delayed last year

• We will communicate more information and public the finalized FY23 Form 10 and ISEE Staffing Manual once we have it
## Basic Education Data System

### Salary Based Apportionment and Benefit Apportionment

#### Computation

**School Year:** 2022-2023  
**District:** 999 Example Charter

**Statewide Information:**  
- Administrative Staff Index: 1.84399  
- Administrative Staff Index Cap: 1.89643  
- PERSI plus PICA Employer Rate: 19.99%

**District Information:**  
- Administrative Staff Index: 2.01260  
- Administrative Staff Index (adjusted for cap): 2.01260  
- Mid-Term Support Units: 16.47

### Salary Based Apportionment and Benefit Apportionment

#### Staff Allowance Ratio

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Separate Sec. School Allowance FTE</th>
<th>Adjusted Staff Allowance FTE</th>
<th>Actual Staff Allowance FTE</th>
<th>Staff Base Index Salary</th>
<th>Average Salary</th>
<th>Certified Preliminary Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>b</td>
<td>c</td>
<td>d</td>
<td>e</td>
<td>f</td>
<td>g</td>
<td>h</td>
</tr>
<tr>
<td>0.0750</td>
<td>1.23525</td>
<td></td>
<td>1.23525</td>
<td>1.00000</td>
<td>1.23525</td>
<td>2.01260</td>
<td>41,491.00</td>
</tr>
<tr>
<td>0.0790</td>
<td>1.30113</td>
<td>1.30113</td>
<td>0.00000</td>
<td>1.30113</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.3750</td>
<td>6.17625</td>
<td>6.17625</td>
<td>8.67000</td>
<td>6.17625</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Noncertified

<table>
<thead>
<tr>
<th>Noncertified Preliminary Salary Based Apportionment (n x j)</th>
<th>Preliminary Salary Based Apportionment</th>
<th>Actual Salary</th>
<th>Salary Based Apportionment Eligible for Benefits Smaller: n or o</th>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
<th>Salary Based Apportionment Plus Allowances</th>
<th>Maximum Salary Apportionment</th>
<th>Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(n x j) m</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructionan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Summary

|                    | 103,149.29 | 100,000.00 | 790,829.95 | 797,597.00 | 61,190.56 | 230,503.40 | 1,106,594.02 | 1,128,100.40 | 1,108,594.02 | 217,173.57 | 1,106,594.02 |

**Salary Based Apportionment and Benefit Apportionment | 50**
## 2022-2023 Salary Based & Benefit Apportionment – District (Average Salaries)

### School Year: 2022-2023

#### District Information:

- **Administrative Staff Index**: 1.05275
- **Administrative Staff Index Cap**: 1.02725
- **PERS Plus FICA Employer Rate**: 19.95%
- **Mid-Term Support Units**: 77.12
- **Instructional/Pupil Service Staffing Percent**: 4.5%

### Staff Allowance Ratios

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Separate Staff Allowance FTE</th>
<th>Adjusted Staff Allowance FTE</th>
<th>Actual FTE</th>
<th>Staff Index</th>
<th>Base Salary</th>
<th>Average Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Units x a)</td>
<td>(b + c + d + e)</td>
<td>(f x g)</td>
<td>h</td>
<td>i</td>
<td>k</td>
<td>j</td>
</tr>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>5.78400</td>
<td>5.78400</td>
<td>4.28000</td>
<td>1.92725</td>
<td>41,491.00</td>
<td>79,983.53</td>
</tr>
<tr>
<td>Instructional</td>
<td>1.2100</td>
<td>78.75862</td>
<td>78.75862</td>
<td>66.54000</td>
<td>71.35357</td>
<td>49,177.50</td>
<td>5,586,864.87</td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0700</td>
<td>6.09248</td>
<td>6.09248</td>
<td>3.87500</td>
<td>5.20098</td>
<td>26,887.05</td>
<td>265,268.44</td>
</tr>
<tr>
<td>Subtotal Instructional and Pupil Service</td>
<td>84.83200</td>
<td>73.81650</td>
<td>73.81650</td>
<td>64.81040</td>
<td>78.57035</td>
<td>24,841.00</td>
<td>111,578.05</td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>28.82000</td>
<td>28.82000</td>
<td>23.82000</td>
<td>28.82000</td>
<td>23.82000</td>
<td>111,578.05</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>119,530.00</td>
<td>107,085.00</td>
<td>111,578.05</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Salary Based Apportionment

- **Salary Based Apportionment**: 462,909.96
- **Virtual Allowance**: 1,356,217.74
- **Ancillary Allowance**: 3,676,120.79
- **Salary Based Apportionment Plus Allowances**: 4,622,909.96
- **Maximum Salary Apportionment**: 4,622,909.96

### Preliminary Salary Based Apportionment

- **Preliminary Salary Based Apportionment**: 1.0695
- **Actual Salary**: 462,909.96
- **Salary Based Apportionment Eligible for Benefits**: 3,676,217.74

### Certified Preliminary Salary Based Apportionment

- **Salary Based Apportionment**: 462,909.96

**Note:** All values are in dollars.
Minimum Salaries for FY23

Minimum salary:
• 33-1004E (1)

• (1) Minimum salary for a full time instructional/pupil services staff member on the residency rung cannot be less than the minimum dollar amount on the residency rung

• For 22-23 this is $40,742
Second Minimum added starting in FY23:

- 33-1004E (2)

  - Minimum salary for a full time instructional/pupil services staff member on the professional or advanced professional rungs cannot be less than the minimum dollar amount on the professional rung

  - For 22-23 this is $43,488
Minimum Salaries for FY26

Third Minimum added starting in FY26:

• 33-1004E (3)

• Minimum salary for a full time instructional/pupil services staff member on the advanced professional rung cannot be less than the minimum dollar amount on the advanced professional rung

• For 25-26 this is not yet defined
### 2022-2023 Salary Based & Benefit Apportionment - Charter School (Benefits)

**Basic Education Data System**

**Salary Based Apportionment and Benefit Apportionment - Chart School (Benefits)**

**School Year:** 2022-2023

**District:** 999 Example Charter

**Statewide Information:**

| Administrative Staff Index | 1.84399 |
| Administrative Staff Index Cap | 1.86943 |
| PERPSI plus FICA Employer Rate | 15.59% |

**District Information:**

| Administrative Staff Index | 2.01260 |
| Administrative Staff Index (adjusted for cap) | 2.01260 |

| Mid-Term Support Units. | 15.47 |

### Staff Allocation

<table>
<thead>
<tr>
<th>Staff Allowance Ratio</th>
<th>Staff Allowance FTE</th>
<th>Separate Sec. School Allowance FTE</th>
<th>Adjusted Staff FTE</th>
<th>Actual Staff FTE</th>
<th>Staff Base Salary</th>
<th>Average Salary</th>
<th>Certified Preliminary Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>1.23525</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional</td>
<td>1.0210</td>
<td>16.81587</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0790</td>
<td>1.30113</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>6.17625</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

|                     |                     |                                   |                   |                 |                  |              |                                                  |

**Noncertified Preliminary Salary Based Apportionment (n x i/j) m**

| Administrative  | 103,149.29          | 100,000.00                        |
| Instructional   | 790,829.95          | 797,567.00                        |
| Pupil Service   | 61,190.56           | 0.00                              |
| Noncertified    | 153,424.23          | 230,503.40                        |
| **TOTAL**       | 1,108,594.02        | 1,128,100.40                      |

### Benefit Apportionment

<table>
<thead>
<tr>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
<th>Salary Based Apportionment Plus Allowances</th>
<th>Maximum Salary Apportionment</th>
<th>Salary Based Apportionment</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i + m) (n x o)</td>
<td>p x 19.59%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>103,149.29</td>
<td>100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>790,829.95</td>
<td>797,567.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>61,190.56</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>153,424.23</td>
<td>230,503.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>1,108,594.02</td>
<td>1,128,100.40</td>
<td></td>
<td></td>
<td>1,108,594.02</td>
</tr>
</tbody>
</table>

**Benefit Apportionment**
## 2022-2023 Salary Based & Benefit Apportionment – District (Benefit Apportionment)

### School Year: 2022-2023

#### District Information:
- Administrative Staff Index: 1.92725
- Administrative Staff Index (adjusted for cap): 1.92725
- Mid-Year Support Units: 77.12
- Instructional / Pupil Service Staffing Percent: 4.5%

#### Statewide Information:
- Administrative Staff Index: 0.00000
- Administrative Staff Index Cap: 1.88643
- PERS1 plus FICA Employer Rate: 19.59%

### District (Benefit Apportionment)

<table>
<thead>
<tr>
<th>Staff Allowance Ratio (Units x a)</th>
<th>Staff Allowance FTE</th>
<th>Small District Staff Allowance</th>
<th>Separate Sec. School Allowance FTE</th>
<th>Adjusted Staff Allowance FTE</th>
<th>Actual Staff Allowance FTE</th>
<th>Benefit Apportionment</th>
<th>Virtual Allowance</th>
<th>Ancillary Allowance</th>
<th>Base Salary</th>
<th>Average Salary</th>
<th>Certified Preliminary Salary Based Apportionment (h x k)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>0.0750</td>
<td>5.78400</td>
<td>4.26000</td>
<td>5.78400</td>
<td>1.92725</td>
<td>41,491.00</td>
<td>79,983.53</td>
<td>482,598.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional</td>
<td>1.0210</td>
<td>78.73862</td>
<td>68.64000</td>
<td>71.35367</td>
<td>49,177.58</td>
<td>5,608,664.67</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pupil Service</td>
<td>0.0790</td>
<td>6.09248</td>
<td>3.87600</td>
<td>5.52008</td>
<td>53,479.03</td>
<td>296,256.44</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal Instructional and Pupil Service</td>
<td>84.83200</td>
<td>73.41600</td>
<td>78.87435</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noncertified</td>
<td>0.3750</td>
<td>28.92000</td>
<td>28.92000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>119.50800</td>
<td>107.00400</td>
<td>111.57805</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Benefit Apportionment

- **Preliminary Salary Based Apportionment**
  - Administration: 482,598.00
  - Instructional: 5,608,664.67
  - Pupil Service: 296,256.44
  - Subtotal Instructional and Pupil Service: 325,819.93
- **Actual Salary**
  - Administration: 381,308.90
  - Instructional: 3,431,918.60
  - Pupil Service: 233,786.50
  - Subtotal Instructional and Pupil Service: 297,866.91
  - Noncertified: 718,401.72
- **Virtual Allowance**
  - Administration: 34,923.20
  - Instructional: 0.00
  - Pupil Service: 0.00
  - Subtotal Instructional and Pupil Service: 0.00
  - Noncertified: 34,923.20
- **Ancillary Allowance**
  - Administration: 0.00
  - Instructional: 3,859,164.51
  - Pupil Service: 0.00
  - Subtotal Instructional and Pupil Service: 0.00
  - Noncertified: 0.00

### Salary Based Apportionment and Benefit Apportionment

- 2022-2023 Salary Based & Benefit Apportionment – District (Benefit Apportionment)
Reports
Come to my other presentation!
Other Items
Prior Year Correction / Payment Adjustment Request

- Available on Public School Finance Website
- Currently can only be used for the 3 years prior to current (this may decrease to 2)
- Corrections to prior year ISEE data without this form will not result in corrected payments
Staffing Resources

- **Public School Finance Site**
  - Resource Files:
    - ISEE Staff Data Guidance Manual
    - Staff Data Guidance – Summer Alternative School
  - Budget Forms & Information/Budget Forms
    - Salary Based Apportionment Templates – District & Charter
  - Other Forms
    - ISEE Form 10 – Record of Performance Criteria outside Idaho Public K-12
    - ISEE Form 6 – Contracted Non-District FTE Recovery
    - Virtual Template
    - Prior Year Correction

- **ISEE General Files Site**
  - Program Information
  - 2022-23 ISEE Manuals
    - ISEE Staff Data Guidance
    - ISEE Staff Summer School Guidance
    - SDE Assignment Credential Manual
  - 2022-23 Other Forms
  - Required Data Collection Elements & Templates
    - ID Unit Record Collection items and Option Sets
    - Other Templates

- **Certification & Professional Standards Site**
  - Form P1 – Professional Endorsement Application
  - Professional Endorsement district Charter Guidance
Questions

Branwyn Phillips | Financial Specialist, Sr.
BCPhillips@SDE.idaho.gov

Idaho State Department of Education
650 W State Street, Boise, ID 83702
208 332 6840
WWW.SDE.idaho.gov