

**Instructional Materials
Coordinators Association of Texas**

New Member

Session

IM 101



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Topics of Discussion

- District Coordinator Job Description
- What does “IMA” mean?
- What does “TEAM” mean?
- Proclamation 2017
- EMAT
- Accounting/Financing/Purchasing
- Online Logins
- Shipping Cost
- Warehousing
- Inventory/Audits

District Instructional Materials Coordinator

The District Instructional Materials Coordinator Shall
Perform the Functions Set Out in the Statutes and
Regulations as May be Prescribed by the
Superintendent.

District Instructional Materials Coordinator

The District IM Coordinator is Responsible for:

- Verify IMA is Maintained Properly.
- Verify Certification Form is Sent into TEA.
- Coordinate all IM Activity within the District and TEA.
- Supervise all Shipping and Receiving.
- Oversee all Deliveries and Transfers within the District.
- Ensure an Annual Physical Inventory is Conducted.
- Adhere to Local and Legal Board Policies.

What Does “IMA” Mean?



Instructional Materials Allotment



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What Does “IMA TEAM” Mean?



IMA TEAM

- Finance
- Purchasing
- Superintendent
- Technology
- District IM Coordinator
- Instructional Staff
- Curriculum



IMA FUNDS

Finance:

- Monitor IMA Funds into the District and Insure Funds are Allocated to the Correct Accounts
- May Need to Have Access as Sign-on or View Only for Budget Needs
- Create a Budget to Cover District Needs Regarding IMA

Purchasing:

- Insure District Purchasing Procedures are Followed Regarding Acquisition, Disposal, and Storage

Superintendent:

- Certifies the School District is Following TEA's Guidelines Regarding Use of IMA Funds and TEKS

IMA FUNDS

Technology:

- What are the Districts Goals for Technology in the Classroom?
- What is Needed to Meet these Goals in Regards to IMA?
- What, if any, Personnel Positions may be Needed to Meet these Goals?
- Evaluates Subscriptions and Renewals

District IM Coordinator:

- Has Access to IMA Funds for Requisitions and Disbursements
- Assist in Locating Instructional Material
- Track Instructional Material for Accountability
- Process and Send Out Materials as they Arrive in District

IMA FUNDS

Instructional Support:

- Input from the Campus Level

Curriculum:

- Input from the Administrative Level as to the Needs at the Campus Level
- Write Curriculum to Meet the TEKS or STAAR Standards
- Hold Publisher Hearings for New Adoptions

Proclamation 2017



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Proclamation 2017

- State Adoption, Fall 2016
- Materials Ordered, Spring 2017
- Implementation, 2017-2018 School Year
 - ❖ Career and Technical Education
 - ❖ Languages Other Than English
 - ❖ Special Topics in Social Studies
 - ❖ Algebraic Reasoning
 - ❖ Statistics

Proclamation 2017

➤ Languages Other Than English

- ❖ Languages Other Than English, Elementary
- ❖ Languages Other Than English, Middle School
- ❖ Discovering Languages And Cultures
- ❖ Special Topics In Language And Culture
- ❖ American Sign Language, Level I
- ❖ American Sign Language, Level II
- ❖ American Sign Language, Level III
- ❖ American Sign Language, Level IV
- ❖ American Sign Language, Advanced Independent Study

Proclamation 2017

➤ Languages Other Than English Continued

- ❖ Level I, Novice Mid To Novice High Proficiency
- ❖ Level II, Novice High To Intermediate Low Proficiency
- ❖ Level III, Intermediate Low To Intermediate Mid Proficiency
- ❖ Level IV, Intermediate Mid To Intermediate High Proficiency
- ❖ Level V, Intermediate High To Advanced Mid Proficiency
- ❖ Level VI, Advanced Mid To Advanced High Proficiency
- ❖ Level VII, Advanced High To Superior Proficiency

Proclamation 2017

➤ Languages Other Than English Continued

- ❖ Seminar In Languages Other Than English, Advanced
- ❖ Classical Languages, Level I, Novice Low To Intermediate Low Proficiency
- ❖ Classical Languages, Level II, Novice Mid To Intermediate Mid Proficiency
- ❖ Level III, Novice Mid To Advanced Low Proficiency
- ❖ Level IV, Novice Mid To Advanced Mid Proficiency
- ❖ Classical Languages, Levels V – VII, Novice High To Superior Low Proficiency
- ❖ Seminar In Classical Languages, Advanced

Proclamation 2017

➤ **Social Studies**

- ❖ Special Topics in Social Studies

➤ **Mathematics**

- ❖ Algebraic Reasoning
- ❖ Statistics

Proclamation 2017

➤ Career and Technical Education

- ❖ Investigating Careers
- ❖ College and Career Readiness
- ❖ Project-Based Research
- ❖ Applied Mathematics for Technical Professionals
- ❖ Career Preparation I
- ❖ Career Preparation II
- ❖ Principals of Agriculture, Food, and Natural Resources
- ❖ Equine Science
- ❖ Livestock Production

Proclamation 2017

➤ Career and Technical Education Continued

- ❖ Small Animal Management
- ❖ Veterinary Medical Applications
- ❖ Advanced Animal Science
- ❖ Energy and Natural Resource Technology
- ❖ Advanced Energy and Natural Resource Technology
- ❖ Oil and Gas Production I
- ❖ Oil and Gas Production II
- ❖ Food Technology and Safety
- ❖ Food Processing

Proclamation 2017

- How to Chose Your Adopted Materials
- Form District Committee
- Samples – Ask for Them
- Region ESC – Materials are Available to View
- Consumable Part of Process
- Student Materials

Consumables

- If Districts Purchase Materials for the Length of the Adoption
- Consumables Will be Shipped Automatically Every Year
- Student Checks Out, Must Keep Book For New Students
- Extra Copies Need to be Kept Together
- Work with Publishers to Negotiate Grade Level Counts According to Class Size
- No Extra Available

EMAT



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What Does “EMAT” Mean?



Educational Materials
Administrative
Technology

APPLICATION

TEA Web Applications are Protected by the Texas Education Agency Secure Environment (TEA SE)

TEA SE Requires You to Log on With an Authorized User Name and Password.

APPLICATION

Each District May Have 4 Users in the EMAT System

2 Users Will Place Orders

2 Users Will be “Read Only”

EMAT USER ID

The Online Form Requesting a Login ID and Application Access Can be Filled Out by the Person Who Needs Access to a Web Application.

The E-mail Address Provided in the Request Will Receive a Notification When Each Portion of the Request is Complete.

EMAT USER ID

When you Submit an Online Request for an EMAT user ID, it May Take Up to 10 Business Days for Processing Your Request.

The Superintendent Must Request the New Users Login From TEA.

IMA & TEKS Certification



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IMA & TEKS Certification

The District Superintendent, Along with the Local Board of Trustees are Required to Certify that the District has Instructional Materials that Cover all Elements of the Essential Knowledge and Skills of the Required Curriculum, Other than Physical Education, for Each Grade Level as Required in the Texas Education Code, Section 28.002.

IMA & TEKS Certification

The Instructional Materials Allotment & TEKS Certification Form Must be Presented to the Local Board of Trustees. The Superintendent, Board President, and Board Secretary Signatures are Required Before the Form Will be Accepted.

IMA & TEKS Certification

When the Instructional Materials Allotment & TEKS Certification Paper Form is Received, TEA Staff Will Update EMAT to Reflect the Receipt. Once All Prerequisites are Complete, Districts Can Begin to Order and/or Request Disbursements in EMAT.

Mail Form to:

Texas Education Agency Instructional Materials and Educational Technology 1701 North Congress Avenue
Austin, TX 78701

Or Fax Form to: 512-475-3612



IMA & TEKS Certification



*Select a School Year

Select a District/Charter

DUNCANVILLE ISD

All prerequisites must be met prior to submitting requisitions or disbursements

IMA & TEKS Certification form was received on 4/21/2015.

[Confirm Contacts](#) [Confirm Addresses](#)

Instructional Materials Allotment Usage for School Year 2015-2016



Remaining Allotment: \$2,004,088.21 Available Allotment: \$2,004,0...

- EMAT
 - EMAT Inventory Browser
 - Reports
 - Allotment Disbursement
 - Report Lost/Damaged/Destroyed
 - IMA & TEKS Certification Form**
- EVI
 - EVI Enrollment
 - EVI Inventory Browser
 - Reports
 - Report Lost/Damaged/Destroyed
 - Ship to STRC
 - Receive STRC Shipment

 - Receive EVI Vendor Shipments



Show Announcements

Hide Complete Requisitions

EMAT Requisition List

Find | | 1-6 of 6

Requisition ID	Last Updated	Requisition Type	
NEXT		Allotment - Continuing Adoptions - EMAT	Create New Requisition
		Allotment - New Adoptions -	

EVI Requisition List

Find | |

Requisition ID	Last Updated	Requisition Type	
NEXT		EVI - Annual Requisition - Audio - LD	Create N
		EVI - Annual Requisition -	

IMA & TEKS Certification



Subject Area Certification			
School Year	Subject Area Offered	Check to Certify	Subject Area
1 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CAREER & TECHNICAL EDUCATION (CTE)
2 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ENGLISH LANGUAGE PROFICIENCY STANDARDS
3 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	FINE ARTS
4 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HEALTH
5 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ENGLISH LANGUAGE ARTS AND READING
6 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LANGUAGES OTHER THAN ENGLISH
7 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MATHEMATICS
8 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SCIENCE
9 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SOCIAL STUDIES
10 2015-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TECHNOLOGY APPLICATIONS

Subject Area Certification

Click Each Box in the “Subject Area Offered and the “Check to Certify” Column in the Subject Area Certification Section of the Screen

IMA & TEKS Certification

Grade Level Certification		
School Year	Check to Certify	Grade Level
1 2015-2016	<input checked="" type="checkbox"/>	Kindergarten
2 2015-2016	<input checked="" type="checkbox"/>	Grade 1
3 2015-2016	<input checked="" type="checkbox"/>	Grade 2
4 2015-2016	<input checked="" type="checkbox"/>	Grade 3
5 2015-2016	<input checked="" type="checkbox"/>	Grade 4
6 2015-2016	<input checked="" type="checkbox"/>	Grade 5
7 2015-2016	<input checked="" type="checkbox"/>	Grade 6
8 2015-2016	<input checked="" type="checkbox"/>	Grade 7
9 2015-2016	<input checked="" type="checkbox"/>	Grade 8
10 2015-2016	<input checked="" type="checkbox"/>	Grade 9
11 2015-2016	<input checked="" type="checkbox"/>	Grade 10
12 2015-2016	<input checked="" type="checkbox"/>	Grade 11
13 2015-2016	<input checked="" type="checkbox"/>	Grade 12



Grade Level Certification

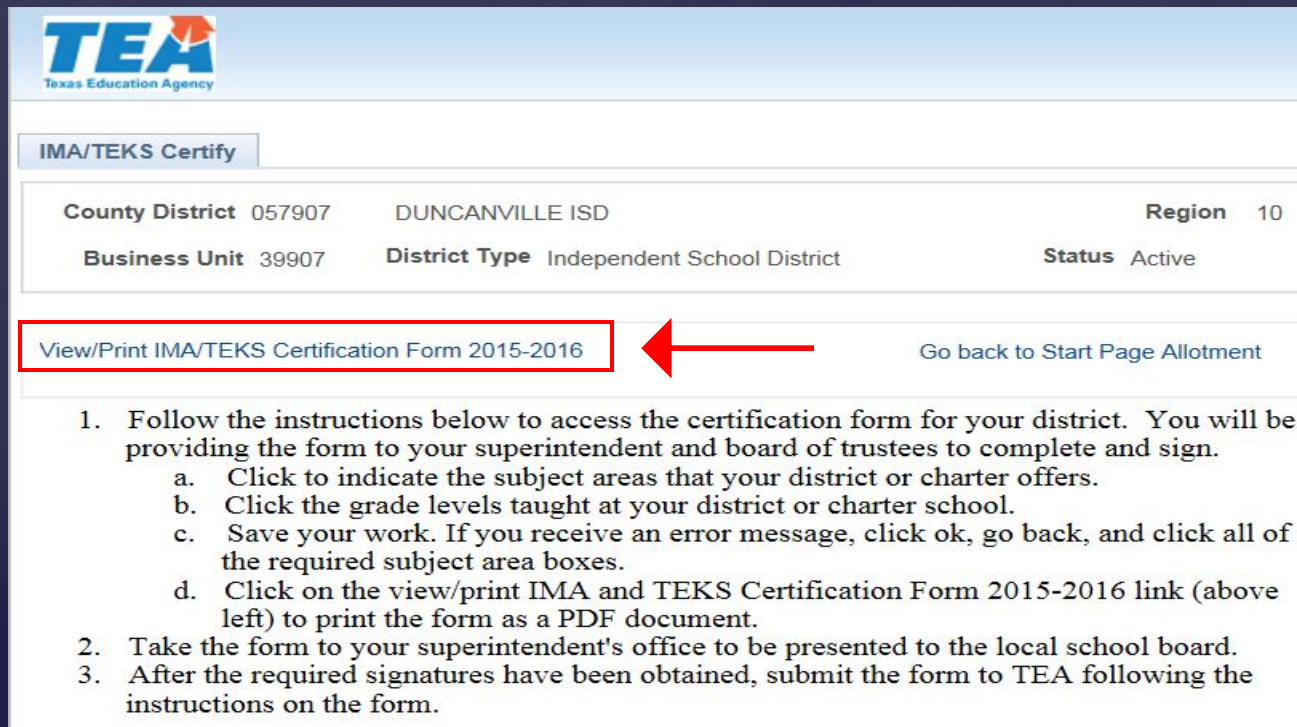
oCheck the Appropriate Grade Levels Taught at Your School District or Charter School in the Grade Level Certification Section of the Screen

SAVE

IMA & TEKS Certification

Printing the IMA & TEKS Certification Form

- Click on the View/Print IMA & TEKS Certification 2015-2016 link to print the form as a PDF document.
- Be sure to allow pop-ups on your computer since the document will open in a new window.



The screenshot shows the TEA (Texas Education Agency) website interface for the IMA/TEKS Certify process. At the top left is the TEA logo. Below it is a navigation bar with a button labeled "IMA/TEKS Certify". The main content area displays user information in a table format:

County District 057907	DUNCANVILLE ISD	Region 10
Business Unit 39907	District Type Independent School District	Status Active

Below the table, there are two links: "View/Print IMA/TEKS Certification Form 2015-2016" (highlighted with a red box and a red arrow pointing to it) and "Go back to Start Page Allotment".

Below the links, there are three numbered instructions:

1. Follow the instructions below to access the certification form for your district. You will be providing the form to your superintendent and board of trustees to complete and sign.
 - a. Click to indicate the subject areas that your district or charter offers.
 - b. Click the grade levels taught at your district or charter school.
 - c. Save your work. If you receive an error message, click ok, go back, and click all of the required subject area boxes.
 - d. Click on the view/print IMA and TEKS Certification Form 2015-2016 link (above left) to print the form as a PDF document.
2. Take the form to your superintendent's office to be presented to the local school board.
3. After the required signatures have been obtained, submit the form to TEA following the instructions on the form.

Requisitions



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Requisitions

Requisitions are the “Old Way” of Doing Business within EMAT.

Districts can Order State Adopted Materials with IMA Funds.

TEA Pays the Freight on Materials Ordered Through Requisitions.

Requisition Ordering

- Continuing Adoptions
- Subscription Renewals
- New Adoptions

Disbursements



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Allotment Disbursements

The Allotment Disbursement in EMAT Enables School Districts to Order Adopted and Non-State Adopted Instructional Materials, Technology Equipment, and Technology Services from the Instructional Materials Allotment (IMA) Available in EMAT

KEY POINTS

- Allotment Disbursement Transactions are Validated Against the District's Remaining Allotment Balance Throughout the Year.
- Allotment Disbursements are Controlled by TEA, who Activate/Deactivate the Allowable Disbursement Types and Categories.
- TEA Approves the Allotment Disbursement Transactions. Payments are Made Directly to the Districts.

Accounting



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IMA PAYMENTS

Each District is Responsible to Order Materials Directly from the Publisher or Vendor Specified on the Allotment Disbursement Request.

IMA PAYMENTS

District's Must Receive a Quote or Bid or
Verify Sole Source Materials Before
Submitting a Disbursement in EMAT.

IMA PAYMENTS

If There is Excess Disbursement Money, a District Must Account for the Overage.

Having a Correct Quote or Bid Will Eliminate Any Excess Dollars.

REVENUE & EXPENDITURES

- Beginning with the 2014-15 Fiscal Year Fund Code
 - ❖ 410 State Instructional Materials Fund (formerly State Textbook Fund)
- Revenue Object Code
 - ❖ 5829 State Program Revenues Distributed by TEA
- Expenditure Object Codes
 - ❖ 6321 Instructional Materials (formerly Textbooks)
 - ❖ 6329 Reading Materials
 - ❖ 6639 Furniture, Equipment, and Software
 - ❖ 6669 Library Books and Media

REVENUE & EXPENDITURES

PISD District Defined

>Org

- ❖ 922 District Managed Accounts
- ❖ 865 Curriculum Managed Accounts

>Sub-objects

- ❖ 003 Instructional Materials Allotment
- ❖ 665 Lost State Materials
- ❖ 765 Lost District Materials
- ❖ Disposal of Old Materials

REVENUE & EXPENDITURES

PISD District Defined

➤ Fund 410 is Used to Record the Revenue and Expenses Related to the IMA Fund.

➤ Revenue

- ❖ 410.00.5829.003.000.2.00.000 – State Revenue Account
- ❖ Recognize and Record the IMA Revenue for the Year

➤ Expenses

- ❖ 410.11.6321.003.865.2.11.000 – Pay Disbursement P.O.'s
- ❖ 410.11.6321.003.922.2.11.000 – Expense Books from Orders

↑
**District
Defined**

REVENUE & EXPENDITURES

PISD District Defined

➤ Local Revenue

- ❖ 410.00.5749.665.000.2.00.000 – Lost State Textbook

➤ Local Expenses

- ❖ 410.11.6321.665.922.2.11.000 – Textbook Replacement



***District
Defined***

Finance



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Finance - IMA

- ~~Technology Equipment~~ Instructional Materials First
- Technology Services

Finance – Deferred Payment

- You Have No Carry Over Funds from Previous Year
- Requisition Orders are Still Shipped and TEA will Pay Publisher in September/October
- Disbursements Will Have to be Paid Out of District Funds and TEA will Reimburse District When Money is Available
- Could be as Late as December/January

Purchasing



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PURCHASING

Read and Learn Your District's Board Policies on
Purchasing.

If You do not Know How to Access Your District's
Board Policies Contact Your Purchasing
Department for Information.

PURCHASING

- IMA Purchases Valued at \$50,000 for a 12-Month Period Must be Made Using One of the Purchasing Methods.
 - ❖ Competitive Bids
 - ❖ RFP-Request for Proposals
 - ❖ Competitive Sealed Proposals
 - ❖ Inter-Local Contracts
 - ❖ Catalog Purchases
 - ❖ Reverse Auctions
 - ❖ Quote

PURCHASING

UNLESS

“Sole Source” Exception Applies, Meaning the Item is Available From Only One Vendor, the Originator of the Materials.

New Editions of State-Adopted IMs Would be Covered by Sole Source Exception.

Online Logins



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Online Logins

- Tracking is Very Important
- Who is Setting Up the Codes
- Who is in Charge of Tracking Codes
- Who is Going to Clear Them at End of Year
- Does Program Work on Current Devices
- Will it be Available First Day of School

Shipping Cost



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Shipping Cost - Requisitions

- Shipping is Paid by TEA
- Money Comes From Another Account not out of your IMA



Shipping Cost - Disbursements

- Covered if Shipped within Texas
- Provide Zip Code for In State Shipping
- Money Comes out of Different Account Other than IMA Funds
- Money Will be electronically Sent to your District and You will Have to Create PO to Pay the Publisher
- Out of State Shipping Will Come Out of IMA if on your Disbursement

Warehousing Your Materials



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WAREHOUSING

Whether you Have a 50,000 sq. ft. Building or a Closet,
There are Some Basics to Warehousing.

- Organization
 - ❖ Control of Inventory-Know who has Access
 - ❖ Pencil & Paper or Software Tracking System
- Staff
- Supplies & Tools
- Shipping & Receiving
 - ❖ Let Vendor Know “dock or no-dock”
 - ❖ Forklift, Ramp
 - ❖ Be Very Specific on Your PO Regarding Delivery Directions

**End
Of
Year
Prep**

Inventory/Audits

End of Year Preparation

- Copy of Campus Inventories
- Copy of Inventory Procedure
- Copy of Surplus Pull Back
- Copy of Out of Adoption Procedure
- Copy of Retained Out of Adoption
 - ❖ Direction from Curriculum Dept.
- Audit Schedule

End of Year Preparation

To organize the Pick Up of O/A and Surplus Materials use Different Color Paper for Labeling.

- ❖ O/A Materials are Labeled
- ❖ Surplus Materials are Labeled

Enjoy Your Conference

Ask Questions! Ask Questions! Ask Questions!