

## Textbook Coordinators' Association of Texas



# I Got the Job, Now What?

## BASIC TRAINING

TCAT Conference  
December 2011

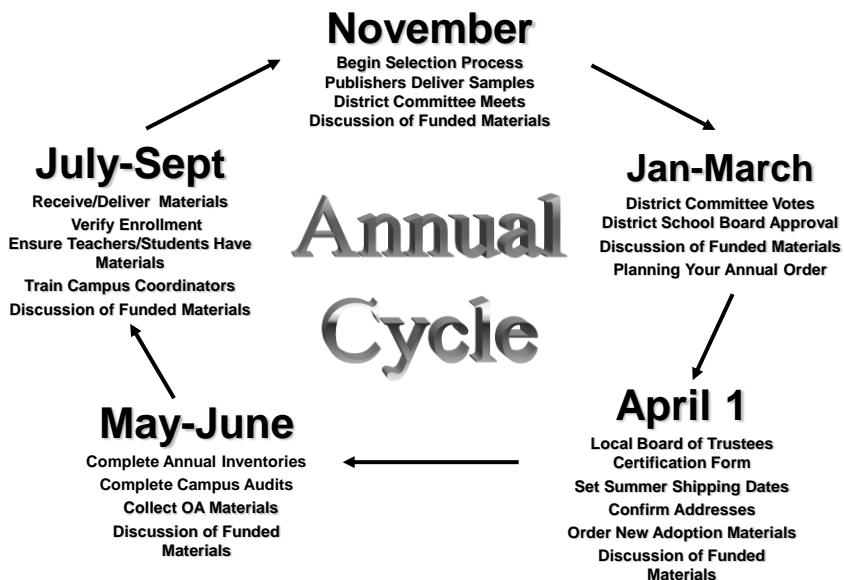
## Topics for Discussion

- Getting Started on the Job
- IMA Funds
- EMAT & EVI Ordering
- Inventory Management
- Warehousing & Distribution



## Tools

- Power Point Presentation
- Handouts
- Notes
- Network
  - ❖ Pass out Business Cards
  - ❖ Collect Business Cards



## First Things First...

- Take Some Time for YOURSELF
- Schedule Time with Your Supervisor
  - ❖ Expectations
  - ❖ Instructional Materials Team
  - ❖ Policies and Procedures
  - ❖ District Instructional Materials Manual
  - ❖ Prioritizing



## First Things First...

- Do You Know How Much Your IMA is?
- Do You Know Who is Authorized to Spend IMA Funds?
- Do You Have a District Inventory Management System?
  - ❖ Paper or Electronic
- Do You Know Your Student Counts?
  - ❖ By Grade?
  - ❖ By Subject?
- Do You Have Access to and Know How to Use EMAT?
- Do You Know How Many Books You Have by Title?
  - ❖ District Inventory vs. TEA Inventory Report

**Questions! Questions! Questions!**

# SENATE BILL 6 (SB6)

## SENATE BILL 6

- **Creates an Instructional Materials Fund**
- **Creates a Per-Student Instructional Materials Allotment (IMA) to be Determined by the Commissioner with Adjustments for High Enrollment Growth**
- **Changes “Textbooks” to Instructional Materials Throughout the Texas Education Code (TEC)**
- **Retains the SBOE Review and Adoption Process**
- **Creates an Instructional Materials Account for Each District in the EMAT System**
- **Requires each District to Certify IMA Funds Will be Used Only for Authorized Purposes and that for Each Subject and Grade Level, the District Provides Each Student with Instructional Materials that Cover All the Elements of the TEKS Adopted by the SBOE for that Subject and Grade Level**

## SENATE BILL 6



- Repeals Credits
- Repeals Maximum Cost
- Repeals Waivers
- Repeals Requirement for a Budget Balanced Cycle
- Repeals Requirement for Depository
- Repeals the Technology Allotment
- Repeals Classroom Set Requirement

## SENATE BILL 6

### District Preparation

- ❖ Consider District Needs: Immediate, Short-term (fall), Long-term (biennium)
- ❖ Consider Team Recommendations

### Requisition Instructional Materials

- ❖ Proclamation 2011
- ❖ Supplemental Science
- ❖ Continuing Contracts

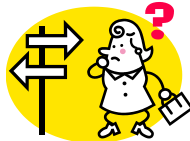
### Request Allotment Disbursement

- ❖ Instructional Material
- ❖ Technology Equipment
- ❖ Technology Services

Everyone is telling  
me  
I need to order!



What, Where, How?



## INSTRUCTIONAL MATERIAL ALLOTMENT

**Before You Can Order Any Instructional Materials You Must Know the Following:**

- **Who is on Your IM Team?**
  - ❖ Superintendent
  - ❖ Elementary Curriculum
  - ❖ Secondary Curriculum
  - ❖ Technology
  - ❖ Finance
  - ❖ District Coordinator
- **Who Makes the Decisions to Spend IMA Funds?**
- **Who Makes the Decisions to Order One Per Student or Class Sets?**

Select a School Year: 2011-2012    Select a District/Charter: 227901    AUSTIN ISD

All prerequisites must be met prior to submitting requisitions or disbursements

Local Board of Trustees Certification form was received on 5/16/2011.

Certification of Allotment Funds is Complete    [Certify Allotment Funds](#)    [Confirm Contacts](#)    [Confirm Addresses](#)

**Instructional Materials Allotment Usage for School Year 2011-2012**

Remaining Allotment: \$8,024,857.07    [Click Chart for Details](#)

**EMAT**

- [EMAT Inventory Browser](#)
- [Reports](#)
- [Allotment Disbursement](#)

**EVI**

- [EVI Enrollment](#)
- [EVI Inventory Browser](#)
- [Reports](#)
- [Sign to STRC](#)

Hide Complete Requisitions

EMAT Requisition List				EVI Requisition List			
Requisition ID	Last Updated	Requisition Type	Find	Requisition ID	Last Updated	Requisition Type	Find
NEXT		Allotment - Continuing Adoptions - EMAT	<a href="#">Create New Requisition</a>	NEXT		EVI - Supplemental - Braille	<a href="#">Create New Requisition</a>
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NEXT		Allotment - Supplemental - EMAT	<a href="#">Create New Requisition</a>	0000075826	05/18/2011	EVI - Annual Requisition - Braille	<a href="#">Complete</a>
0000075827	05/17/11	EMAT - Annual - Subscription Renewals	<a href="#">Complete</a>	0000075849	05/19/2011	EVI - Annual Requisition - Large Type	<a href="#">Complete</a>
0000075828	05/17/11	EMAT - Annual - New Adoptions	<a href="#">Complete</a>	0000075874	05/19/2011	EVI - Supplemental - Braille	<a href="#">Complete</a>
0000075829	05/17/11	EMAT - Annual - Continuing Adoptions	<a href="#">Complete</a>	0000075875	05/19/2011	EVI - Supplemental - Large Type	<a href="#">Complete</a>
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0000075929	07/22/11	Allotment - Subscription Renewals - EMAT	<a href="#">Complete</a>	0000075892	05/25/2011	EVI - Supplemental - Large Type	<a href="#">Complete</a>

# Before Placing Your Order

Make Sure You Have  
 Authorization to Spend Your  
 District Allotment

## Before Placing Your Order

Make Sure You Know What  
Your District Adopted in Each  
Subject Area

## Before Placing Your Order

### Know Your MLC's to Subject

- **PREKINDERGARTEN**
  - ❖ 0001 Pre-K Learning Systems
- **KINDERGARTEN**
  - ❖ 0004 English Language Arts and Reading
  - ❖ 0007 Spanish Language Arts and Reading
  - ❖ 0052 ESL, Kindergarten (SE)
  - ❖ 0053 ESL, Kindergarten (TE)
  - ❖ 0120 Mathematics, Kindergarten (Consumable)
  - ❖ 0123 Spanish Mathematics, Kindergarten (Consumable)
  - ❖ 0600 Technology Applications, Kindergarten

## Before Placing Your Order

### Know Your MLC's To PEIMS #'s

English Language Arts & Reading, Grade K	0004	02630001 02620001
English Language Arts & Reading, Grade 1	1004	02630010 02620010
Reading, Grade 2	2004	02620020
Reading, Grade 3	3004	02620030
Reading, Grade 4	4004	02620040
Reading, Grade 5	5004	02620050
Spanish Language Arts & Reading, Grade K	0007	02561005 02620001
Spanish Language Arts & Reading, Grade 1	1007	02561010 02620010
Spanish Reading, Grade 2	2007	02561020
Spanish Reading, Grade 3	3007	02561030
Spanish Reading, Grade 4	4007	02561040
Spanish Reading, Grade 5	5007	02561050

## Before Placing Your Order

### Gather the Following Data:

- **New Adoption Materials**
- **Growth of Current Adoptions**
- **EMAT-Requisitions**
- **EMAT-Disbursements**
- **District Purchases**
- **EVI**



## Before Placing Your Order

- Submission of the Local Board of Trustees Certification Form
- Confirm District Contacts and Addresses
- Confirm “Wish List” Shipment Dates
- Confirm Dates When Shipments Cannot be Received

## Placing Orders

**Ordering Consumables From Publishers**

**EMAT & EVI Ordering**

**Replacing Lost Materials**

**Technology Materials**

**As You Complete Orders, Make Notes About  
Distribution and Fill Out Distribution Paperwork**

# CONSUMABLES

## Ordering Consumables



- Set Up & Maintain a File ... What Was Ordered Last Year?
- Talk to Your Publisher Rep
  - ❖ What Consumables Do You Order in EMAT? (IMA)
  - ❖ What Consumables Do You Order from Publishers? (non-IMA)
- Check to See if There is Stock Left Over From Previous Years
- Check to See if Schools Still Use the Material

# EMAT

## EMAT Ordering

**Verify Before You  
Order**



- Subscriptions
- Annual New Adoption
- Mid-cycle
- Commissioners List
- Open Source
- Supplemental Orders
- Growth Materials
- EVI

**Requisition vs. Disbursement**

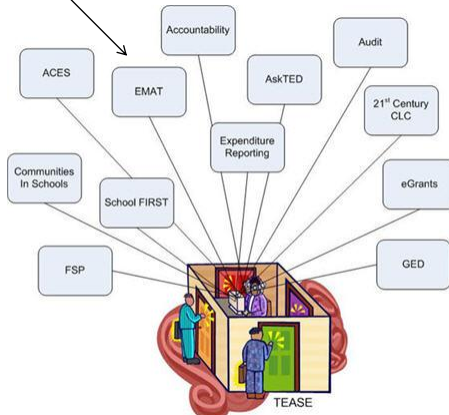
## APPLICATION IN EMAT

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.

*Gateway to Instructional Materials!*

## TEA SE



## EMAT USER ID

### Procedure Steps

1. On a computer with Internet access, use a Web browser to go to

<https://seguin.tea.state.tx.us/appsng/um/apply.aspx>.

The screenshot shows a web browser window with a blue header and footer. The header contains the Texas Education Agency logo and 'Exit Help' buttons. The main content area is titled 'Request New TEA SE User Account'. Below the title, there is a text box with instructions: 'If you already have a user name and password for another TEA application, log on to TEA SE and select "Add/Modify Application Access" from Application List page.' Below this, another instruction reads: 'Select the web application you need from the drop-down list. If the application is not displayed in the list, access the Application Reference Page to print a request form that can be faxed to TEA.' At the bottom of the form, there is a dropdown menu labeled 'Select Application', a 'Continue' button, and an 'Exit' button. The footer contains the text: 'The Texas Education Agency Security Environment, The Texas Education Agency, 1701 North Congress Ave, Austin, TX 78701-1494, Thanks for using the system.'

## 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.

## EMAT

- Send Your Local Board of Trustees Certification Form
- Confirm Your District Contacts
- Confirm Your District Address

The screenshot displays the EMAT system interface for AUSTIN ISD. At the top, it shows the school year (2011-2012) and district charter (207901). A progress bar indicates that the 'Instructional Materials Allotment Usage for School Year 2011-2012' is 0% remaining, with a total allotment of \$820,407.07. Below the progress bar, there are two tables of EMAT requests. The left table shows 'EMAT Request List' with columns for 'Requestion ID', 'Requestion Type', and 'Status'. The right table shows 'EMAT Request List' with columns for 'Requestion ID', 'Requestion Type', and 'Status'. Both tables list various request types such as 'Adoption - Continuing Adoptions - EMAT', 'Adoption - New Adoptions - EMAT', 'Adoption - Supplemental - EMAT', 'Annual - Subscription Renewals', 'Annual - New Adoptions', 'Annual - Continuing Adoptions', 'Supplemental Requestion', and 'Subscription Renewals - EMAT'. The status for most requests is 'Complete'.

Requestion ID	Requestion Type	Status
NEXT	Adoption - Continuing Adoptions - EMAT	Create New Requestion
NEXT	Adoption - New Adoptions - EMAT	Create New Requestion
NEXT	Adoption - Supplemental - EMAT	Create New Requestion
0000075827	EMAT - Annual - Subscription Renewals	Complete
0000075828	EMAT - Annual - New Adoptions	Complete
0000075829	EMAT - Annual - Continuing Adoptions	Complete
0000075865	EMAT - Supplemental Requestion	Complete
0000075829	Adoption - Subscription Renewals - EMAT	Complete

Requestion ID	Requestion Type	Status
NEXT	EMAT - Supplemental - Braille	Create New Requestion
NEXT	EMAT - Supplemental - Large Type	Create New Requestion
0000075826	EMAT - Annual Requestion - Braille	Complete
0000075849	EMAT - Annual Requestion - Large Type	Complete
0000075874	EMAT - Supplemental - Braille	Complete
0000075875	EMAT - Supplemental - Large Type	Complete
0000075891	EMAT - Supplemental - Braille	Complete
0000075892	EMAT - Supplemental - Large Type	Complete

# EMAT – In Progress

➤ EMAT will tell you where you are in the process.

- ❖ Create new requisition
- ❖ In progress
- ❖ Submitted
- ❖ Complete

\*Select a School Year: 2011-2012 | Select a District/Charter: 227901 | AUSTIN ISD

All prerequisites must be met prior to submitting requisitions or disbursements.

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Start a New Order

Hide Complete Requisitions

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# EVI

Select a School Year: 2011-2012 Select a District/Charter: 227901 AUSTIN ISD

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- EMAT
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Start a New Order

Hide Complete Requisitions

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# LOSSES

## Replacing Your Losses

- **Collect Lost Materials Data From Your End of Year Inventories.**
- **Ask the Question “Do You Still Need the Materials?”**
- **Attempt to Replace Instructional Materials Through Used Book Dealers.**
- **Purchase Books From Publishers.**
- **Replace Technology from Vendors.**

# TECHNOLOGY MATERIALS

## Technology Materials

### What Can be Purchased With IMA Funds?

- Desktop
- eBook
- Learning Lab
- Tablet
- Whiteboard
- Workstation
- Technological Services



**O/A's**

## Is Anything Up for Adoption?

- **What is Your District's Procedure for Instructional Material Adoption?**
  - ❖ **Where Do You Fit Into The Process?**
  - ❖ **Will Your District Purchase the New Materials?**
  - ❖ **Will Your District Purchase One Per Student or Class Sets?**
  - ❖ **Will Your District Keep Any of the Old Materials?**



## Is Anything Up for Adoption?

**Reports Available Through TEA Stating What is in Adoption and What is Going Out Of Adoption**

- **Instructional Materials Current Adoption Bulletin**
- **Materials That Expired End of School Year**



## Out with the Old ...

### SB6 Allows Districts to Sell Out of Adoption Materials

- 1/2 Price Book Companies
- Recycle Companies
- Auctions



## Receiving Orders



- Print a Master List of All Incoming Materials by Vendor.
- Set Up a Process to Keep Vendor Information Organized.
- Have a Staging Area When the Shipment is Delivered. Do Not Mix Shipments Until All is Checked in.

## Receiving Orders



- **Verify The Shipment to the Packing Slip**
- **Write Down Any Discrepancies on the Paperwork**
- **Check Off Orders as They are Received**
- **Follow Up on Any Missing or Damaged Items**  
Complete a TEX-013 if Appropriate

## Distributing Material

- **Look at Your Enrollment and Inventory Per Campus.**  
**Know What is Needed on Each Campus.**
  - ❖ **Do You Automatically Send Materials to Campuses?**
  - ❖ **Do You Ask the Campuses to Order Materials?**
    - **Some Campuses Want Only Class Sets**
    - **Some Campuses Want One Per Student**
- **Sort Items Onto Pallets by Campus**
- **Sign Paperwork When Order Has Been Filled**
- **Label Pallet by Campus Name. Keep Paperwork With Pallet**

## Campus Delivery

- **Arrange to Meet the Campus Coordinator on a Particular Date.**
- **Break Down Pallet or Boxes With the Campus Coordinator.**
- **Identify and Go Over Information as You Check it in.**
- **Count the Material Together.**
- **GET SIGNATURES!**



**AREAS  
TO  
REMEMBER**



## New Campuses

- Do You Have New Campuses?
- Do You Need to Move Materials From One Campus to Another or Will There be All New Materials?
- How Many Students Will be Moving to the New Campus?
- How Many Students Will Stay On the Old Campus?
- Meet With the Principal of the New Campus and Make Sure the Same Materials Will be Used.

**SCHOOL  
STARTS  
TOMORROW!!!**

## Just Breathe!



The Beginning of the School Year is a Very Busy Time.

Once the First Six Weeks is Under Way, You Can Start “Maintenance”.

- Supplemental Orders
- Transfers / Leveling
- Additional Teaching Units

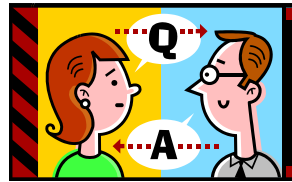
## Time to Evaluate

- Inventory Management System?
- Procedures Manual?
- Education of District Personnel
  - ❖ Changes
  - ❖ Implications
  - ❖ Accountability
  - ❖ Standardization



## It's Not What You Know...

- Maintain Ongoing Communication Between You and:
  - ❖ District IMA Team
  - ❖ TEA (Through Consultants or EMAT)
  - ❖ Campus Personnel
  - ❖ Other District Coordinators
  - ❖ Vendors
  - ❖ Publishers



## Go Surfing!

- [www.tcat.org](http://www.tcat.org)
  - ❖ Textbook Coordinators' Association of Texas
- <http://www.tea.state.tx.us/index2.aspx?id=3373>
  - ❖ TEA IMAT
- <http://www.capitol.state.tx.us>
  - ❖ Texas Legislature Online
- [www.nttca.org](http://www.nttca.org)
  - ❖ North Texas Textbook Coordinator Association



## Go Shopping!

- Vendors
  - [www.tepa.org](http://www.tepa.org)
    - ❖ Publisher Reps
  - [www.fes.follett.com](http://www.fes.follett.com)
    - ❖ Follett Educational Services
  - [www.textbookwarehouse.com](http://www.textbookwarehouse.com)
    - ❖ Textbook Warehouse



If you have any questions during the next few months please contact:

### Susan Lenox

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Plano ISD

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469-752-1585

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972-708-2273