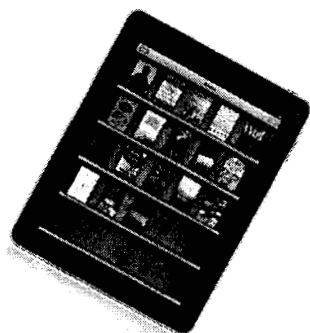


Hands-On EMAT Training

**TCAT Annual Conference
December 2011**

**DANA WIEST
TEXTBOOK COORDINATOR/RECORDS
MANAGEMENT OFFICER
ECTOR COUNTY ISD
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dana.wiest@ectorcountyisd.org**

With SB 6 – Things Have Changed!



3

Example District IMA Expenditure
Overview

Information Technology - Information Technology Services	5,555,555.00
Information Technology - Information Technology Services	5,555,555.00
Total Information Technology - Information Technology Services	11,111,110.00
Information Technology - Information Technology Services	5,555,555.00

*SB6 Has Changed Some of the
Ordering Requirements
for EMAT Materials*

Here is the high-level list of these changes:

1. The district technology allotment will be added to the overall allotment balance and controlled through EMAT. Districts will receive disbursements for technology equipment, technology services, and non-adopted instructional materials through the new Allotment Disbursement transaction in EMAT.
2. Districts' remaining credit balances from prior school years will be added to the 2011-2012 school year allotment. Credits will no longer be generated for materials ordered through EMAT.
3. Requisitions will be validated against the district's remaining allotment balance throughout the school year instead of using the eligibility calculation based upon enrollment.

5

Changed Ordering Requirements...

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

Changed Ordering Requirements...

7. Sourcing district requisitions to another district's surplus will be disabled.
8. Fast grow will be included in the district's allotment calculation and will be referred to as "High Enrollment."
9. Lost, damaged, and worn-out textbooks will no longer be reported and reimbursed through EMAT except for EVI materials. Destroyed instructional materials (TEX-012) will still be available to districts.

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Changed Ordering Requirements...

10. Reporting surplus and enrollment will no longer be required since eligibility-based ordering and surplus will not be enabled in EMAT.
11. SBOE and Commissioner's List instructional materials can either be sourced to a depository or to the publisher directly.

8

State Board of Education Adopted Materials

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

9

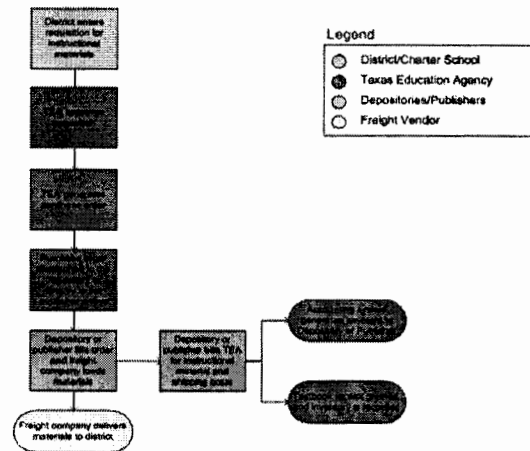
Commissioner's List Materials

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

10

Commissioner's List and SBOE Adopted Process

Commissioner's List and SBOE Adopted Instructional Material Order Process



Additional Information - Commissioner's List and SBOE Adopted

Which Requisitions are available to order the instructional materials?	<ul style="list-style-type: none"> • Allotment - Subscription Renewals - EMAT • Allotment - New Adoptions - EMAT • Allotment - Continuing Adoptions - EMAT • Allotment - Supplemental - EMAT
How are these instructional materials ordered?	TEA submits the orders on behalf of the district electronically through EDI with the Depositories or directly to the publisher through EMAT
How are these instructional materials shipped?	The Depositories or publisher ship the materials directly to the district
How are these instructional materials paid?	TEA pays the depository or publisher associated to each SBOE or Commissioner's List program item in EMAT

Changes to Ordering Prerequisites and the District Start Page

Ordering prerequisites for school year 2011-2012:

- Completion of the Local Board of Trustees Certification form
- Confirming district contacts and address if these have not been reviewed/updated in the last 90 days
- NEW - Certify Allotment Funds

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Certify Allotment Funds Page

County District: 003902	HUDSON ISD	Region: 7
Business Unit: 03902	District Type: Independent School District	Status: Active

School Year: 2011-2012

Our district/charter school certifies the following:

1. That this district's instructional materials allotment will be used only for expenses allowed by TEC §31.0211, 82nd Texas Legislature.
2. That this district purchases instructional materials that will assist the district in satisfying performance standards under Texas Education Code (TEC) §34.0241, Satisfactory Performance Standards, on assessment instruments adopted under TEC §39.023(a) and (c), 82nd Texas Legislature.
3. That the supplemental instructional materials, in combination with any other instructional materials or supplemental instructional materials used by this district, cover the essential knowledge and skills identified under Section 28.002 by the State Board of Education for the subject and grade level for which this district is requisitioning the supplemental instructional materials.
4. That this district will provide the title and publication information for any instructional materials requisitioned or purchased by the district with the district's instructional materials allotment.

Please enter your Phone number:

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

District Start Page

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Phase I Changes

1. Show announcements as a pop-up page per session login when a district first enters the District Start Page and the announcement is not expired
2. Add existing district credit balances to their allotment totals

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Phase II Changes

1. Add Report Destroyed or Sold Materials transaction
2. Add an Allotment-based Inventory Transfer transaction

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The New Requisitions Are:

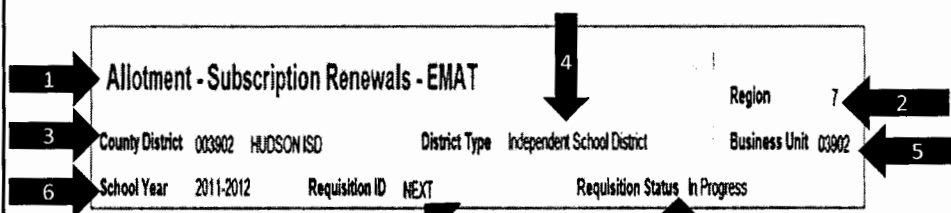
1. Allotment - Subscription Renewals - EMAT
2. Allotment - New Adoptions - EMAT
3. Allotment - Continuing Adoptions - EMAT
4. Allotment - Supplemental - EMAT

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Requisition Ordering Sequence:

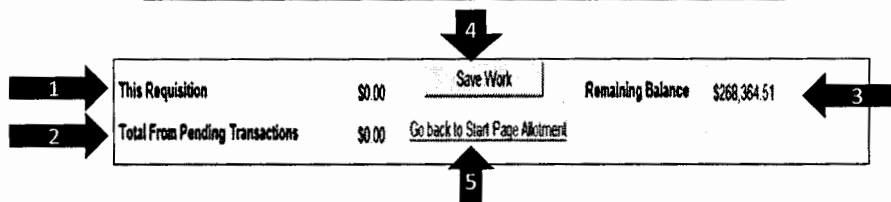
1. Allotment - Subscription Renewals - EMAT
2. Allotment - New Adoptions - EMAT or Allotment
- Continuing Adoptions - EMAT
3. Allotment - Supplemental - EMAT (available after
the Allotment - Continuing Adoption - EMAT
requisition is complete)

Common Requisition Information



1. Requisition Type
2. District Region or ESC number
3. County district number and district name
4. District Type
5. Business Unit for EMAT internal data
6. School Year
7. Requisition ID or NEXT if new requisition
8. Requisition Status

Next Section – Allotment Activity and Balance



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

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1. Subscription Renewals

Subscription Renewals...

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

Item Code	Description	Unit Price	Extended Amount	Inventory
100	Previous Year Technology Instruments Grade 5			
200	Previous Year Technology Applications Grade 7			
300	Digital Literacy & Awareness with Printing & Mail			
400	Web Browsing SBEC's Learning Statements			

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

25

Subscription Renewals...

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

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

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Subscription Renewals...

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

Allotment - Subscription Renewals - 6

County District: 003002 HUDSON ISD District Type: Independent School District Region: 7
 School Year: 2011-2012 Requisition ID: 000073758 Requisition Status: In Progress Business Unit: 7

This Requisition: \$4,148.10 Remaining Balance: \$284,216.41
 Total From Pending Transactions: \$0.00 [Go Back to Start Page \(Warning\)](#)

Subst ID	Subst Desc	Qty	Unit Price	Ext. Amt	Standard Price	Quantity	Extended Amount	Unit Price	Quantity	Extended Amount
1	100	012000000	2	Provision Mail Technology Applications Order 1	0000	000.000	012.00	00.00	00	0000.000
2	100	012000000	2	Provision Mail Technology Applications Order 1	0000	000.000	012.00	00.00	00	0000.000
3	100	012000000	2	Digital Graphics (Advertiser and Publisher 8	0000	000.000	012.00	00.00	00	0000.000
4	100	012000000	2	Video Streaming Services Using Intermediate	0000	000.000	012.00	00.00	00	0000.000

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

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Subscription Renewals...

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

Allotment - Subscription Renewals - EMAT

County District: 003002 HUDSON ISD District Type: Independent School District Region: 7
 School Year: 2011-2012 Requisition ID: 000073758 Requisition Status: In Progress Business Unit: 7

This Requisition: \$4,148.10 Remaining Balance: \$284,216.41
 Total From Pending Transactions: \$0.00 [Go Back to Start Page \(Warning\)](#)

Select a Delivery Address: 003002002
 Delivery Address: 003002002
 EMAT Delivery Point: 6738 TROUT CREEK
 LUFKIN, TX 75904


Requisition Information: Last Updated By: DBAGENT 07/20/2011 AM

Select a Ship Date	View Print Requisition Summary	Subtotal Information
Shipping Date: 08/04/2011	View Print Requisition Summary	Total TEA Paid to Publisher(s): \$4,148.10
Select an available shipment date	View Print Order List	Total TEA Paid to District: \$0.00

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Subscription Renewals...

8. To review the requisition before submitting, click on the **View/Print Requisition Summary**.



TEXAS EDUCATION AGENCY
Ensuring a bright future for every child

Requisition Summary

Altitude - Subscription Renewals - EMAT

Director: Charis O'BRIDE-REIDYEN D.D.
 Requisition ID: 8000077728
 Status: Submitted
 Last Updated by: DBAGANT/2011/07/20 12:31:32
 Requested Ship Date: 08-04-2011

SBOE Advisory
 Department - Publisher:
 Thomas Education Depository

REQ ID	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ
8000077728	001	001	001	001	001	001	001	001	001	001	001	001	001	001	001	001	001	001	001	001

Total TEA paid to Publisher: Thomas Education Depository
 *Total Due from District to Publisher: Thomas Education Depository
\$3,118.00
 08 00

Department - Publisher:
 Anthony SCM LLC Depository

REQ ID	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ	REQ
8000077728	002	002	002	002	002	002	002	002	002	002	002	002	002	002	002	002	002	002	002	002

Total TEA paid to Publisher: Anthony SCM LLC Depository
 *Total Due from District to Publisher: Anthony SCM LLC Depository
\$0.00
 08 00

Total TEA paid to All Publishers: **\$3,118.00**

*If an internet request is sent to "Total TEA paid to District", the school district or open-enrollment district school is responsible for paying that amount directly to the affected publisher(s). Payment should not be sent to TEA. District will receive a payment from TEA, but will be responsible for making the national net paying for designated publisher(s) directly.

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Subscription Renewals...

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

Select a Delivery Address Delivery Address: 079906002 EMAT Delivery Point: 16417 HWY 38 MEEDVILLE TX 77461		Requisition Information Last Updated By: Larry Sims 07/25/2011 10:18AM	
Select a Ship Date Shipping Date: 08/04/2011 Select an available Shipment Date		View/Print Options View/Print Requisition Summary View/Print Order List	
		Financial Information Total TEA Paid to Publisher(s): \$0.00 Total TEA Paid to District: \$0.00	

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

Subscription Renewals...

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

The screenshot displays a web application interface for requisition management. At the top, there is a header with the text "Select a Fiscal Year: 2011-2012" and "District/Chapter: 003902 HUDSON USD". Below this, there is a section titled "Lock Status of Requisition" and "Confirmation of Approved Funds is Complete". A table below shows a list of requisitions with columns for "Requisition ID", "Status", and "Submitted Date". An arrow labeled "10" points to the "Submitted" status in the table.

Requisition ID	Status	Submitted Date
10000	Submitted	12/2/2011
10001	Submitted	12/2/2011
10002	Submitted	12/2/2011
10003	Submitted	12/2/2011
10004	Submitted	12/2/2011
10005	Submitted	12/2/2011
10006	Submitted	12/2/2011
10007	Submitted	12/2/2011
10008	Submitted	12/2/2011
10009	Submitted	12/2/2011
10010	Submitted	12/2/2011

2. New Adoptions

New Adoptions Requisition

- The Annual New Adoptions Requisition is subject to EMAT prerequisites.
- The purpose of this requisition is to order newly adopted Commissioner's List and SBOE materials, which will be available for order during the new school year.

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New Adoptions Requisition...

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

Hide Complete Requisitions

Requisition ID	Last Updated	Requisition Type	Requestor Name	Requestor Title	Create New Requisition
NEXT		Allotment - Continuing Requisitions - EMAT			Create New Requisition
NEXT		Allotment - New Adoptions - EMAT			Create New Requisition
NEXT		Allotment - Supplemental - EMAT			Create New Requisition
0000073756	07/20/11	Allotment - Supplemental - EMAT			Cancel

34

New Adoptions Requisition...

- The Requisition Summary tab is displayed. The requisition screen has a tab for each grade level through eighth grade and a tab for each subject area for high school when there is newly adopted material adopted for the respective grade.
- The **Save Work** button is on this tab. The Save Work button saves all the requisition data when selected.

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New Adoptions Requisition...

- Click on the **Pre-Kindergarten** tab:

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Item	Title	Quantity	Unit Price	Total Price
1 0078742346	The DLM Early Childhood Express Texas Package - PreKindergarten System		SBCE Adopted	
2 0078118186	The DLM Early Childhood Express Tx Pkg Print, INACTIVE	100,000	\$2,446.96	\$0.00
3 0438880882	Scholastic Early Childhood Program - PreKindergarten System	100,000	\$2,448.00	\$0.00
4 0757811900	Public Book Expressions Public Book Expressions - PreKindergarten System	100,000	\$2,445.00	\$0.00

New Adoptions Requisition...

5. Enter the **Student Requisition Quantity** and/or the **Teacher Requisition Quantity** for each New Adoption item you would like to order. For your reference, several informational columns are shown to the right of the quantity columns:
- EMAT Type – SBOE Adopted, Commissioner’s List, or Open Source.
 - TEKS % - Texas Essential Knowledge Skills percentage covered by the listed item.
 - Mid Cycle Checkbox – When checked, indicates the item was adopted as part of a mid-cycle adoption and not during a standard adoption.
 - Standard Price – represents the unit price for the item. The price will be multiplied by the quantity ordered to calculate the Extended Amount.
 - Extended Amount – Calculated amount will be deducted from the district allotment balance.

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New Adoptions Requisition...

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

Item#	Title	Requestion Quantity	Standard Price	Extended Amount
1 0078728246	The DLM Early Childhood Express Texas Pathway - PreKindergarten System	100,000	\$2,448.39	\$2,448.39
2 0078115186	The DLM Early Childhood Express Tx Pkg PreK UNACTIVE	100,000	\$2,448.39	\$2,448.39
3 0423399086	Scientific Early Childhood Program - PreKindergarten System	100,000	\$2,448.39	\$2,448.39
4 0757831886	Public News Experiences (Public Soup Experiences) - PreKindergarten System	100,000	\$2,448.00	\$2,448.00

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New Adoptions Requisition...

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

Select a Delivery Address Delivery Address: 079906002 EMAT Delivery Point 10417 HWY 36 NEEDVILLE TX 77461		Requisition Information Last Updated By: Larry Sims 07/25/2011 10:19AM
Select a Ship Date Shipping Date: 08/04/2011 Select an available Shipment Date	View/Print Options View/Print Requisition Summary View/Print Order List	Financial Information Total TEA Paid to Publisher(s): \$0.00 Total TEA Paid to District: \$0.00

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

Submit To TEA Cancel Requisition

Requisition Summary | Pre-Kindergarten | Kindergarten | 1st Grade | 2nd Grade | 3rd Grade | 4th Grade | 5th Grade | 6th Grade | 7th Grade | 8th Grade | High School - ELA

New Adoptions Requisition...

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

Select a School Year: 2011-2012 District/Charter: 002902 HUDSON ISD

All requisitions are processed before work is sent prior to submitting Annual EMAT Requisitions.

Local Board of Trustees Conference form was received on 7/18/2011.

Confirm Contents Confirm Address

Instructional Materials Adopted Manager for School Year 2011-2012

EMAT Requisition List

Requisition ID	Last Modified	Requisition Type	Submitted
000072108	07/25/11	Adoptment - New Adoption - EMAT	Submitted
NEOT		Adoptment - Continuing Adoption - EMAT	Submit New Requisition
NEOT		Adoptment - Supplemental - EMAT	Create New Requisition
000072758	07/20/11	Adoptment - Supplemental - EMAT	Submitted

EMAT Requisition List

Requisition ID	Last Modified	Requisition Type	Created New Requisition
NEOT		EVI - Annual Requisition - Large Type	Create New Requisition
NEOT		EVI - Annual Requisition - Large Type	Create New Requisition
NEOT		EVI - Supplemental - Large Type	Create New Requisition
NEOT		EVI - Supplemental - Large Type	Create New Requisition



10

3. Continuing Adoptions

Continuing Adoptions

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

Continuing Adoptions...

To access and use the *Allotment – Continuing Adoptions – EMAT* Requisition:

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

The screenshot shows a web interface for creating a requisition. At the top, it displays 'Select a School Year: 2011-2012' and 'District/Character: 003902 HUDSON ISD'. Below this is a 'Local Board of Trustees' notification. A chart shows 'Instructional Materials Allotment Usage for School Year 2011-2012' with a remaining allotment of \$98,843.19. A table of requisition types is shown below, with a black arrow labeled '1' pointing to the 'Allotment - Continuing Adoptions - EMAT' row. The table includes columns for 'Requisition ID', 'Requisition Type', and 'Action'.

Requisition ID	Requisition Type	Action
NEXT	Allotment - Continuing Adoptions - EMAT	Create New Requisition
NEXT	Allotment - Supplemental - EMAT	Create New Requisition
00007370	Allotment - Supplemental - Requisition - EMAT	Scratch
00007370	Allotment - New Adoptions - EMAT	Complete

Continuing Adoptions...

2. The Requisition Summary tab is displayed. The requisition screen has a tab for each grade level through eighth grade and a tab for each subject area for high school.
3. The **Save Work** button is on this tab. The Save Work button saves all the requisition data when selected.

The screenshot shows the 'Allotment - Continuing Adoptions - EMAT' requisition summary page. At the top, it displays 'Region: 7' and 'Business Unit: 03902'. Below this is a table with columns for 'County District', 'School Year', 'Requisition ID', 'District Type', and 'Requisition Status'. The 'Save Work' button is highlighted with a black arrow labeled '3'. The page also shows 'Total from Pending Transactions' and 'Remaining Balance'.

County District	School Year	Requisition ID	District Type	Requisition Status
003902	2011-2012	NEXT	Independent School District	In Progress

Continuing Adoptions...

- Click on the **1st Grade** tab and the following page is displayed. It is important to note that materials previously ordered for a specific Multilist Code [MLC] will automatically default in the Requisition Detail portion of the page. If there are no materials ordered by the district for a specific Multilist Code, then no materials will be shown.

Allotment - Continuing Adoptions - EMAT

County District: 003041 - WILSON ISD District Type: Independent School District Requisition Unit: EMAT
 School Year: 09112012 Requisition ID: 14877 Requisition Status: In Progress

This Requisition: \$0.00 Line Item: Requisition Balance: \$26,842.18
 Total from Pending Transactions: \$0.00 Requisition Balance: \$26,842.18

Requisition Line	Item	Description	Quantity	Unit Price	Total Price	Original Price	Original Quantity	Original Unit Price	Original Total Price
1 1000	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
2 1000	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
3 1100	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
4 1100	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
5 1200	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
6 1300	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
7 1400	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
8 1500	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
9 1600	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
10 1700	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
11 1800	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
12 1900	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
13 2000	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00

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Continuing Adoptions...

- To order different materials for a Multilist Code that has materials previously ordered, the icon must be selected. An additional row for the Multilist Code [MLC] will appear and the new material can be selected by clicking on the prompt icon

Allotment - Continuing Adoptions - EMAT

County District: 003041 - WILSON ISD District Type: Independent School District Requisition Unit: EMAT
 School Year: 09112012 Requisition ID: 14877 Requisition Status: In Progress

This Requisition: \$0.00 Line Item: Requisition Balance: \$26,842.18
 Total from Pending Transactions: \$0.00 Requisition Balance: \$26,842.18

Requisition Line	Item	Description	Quantity	Unit Price	Total Price	Original Price	Original Quantity	Original Unit Price	Original Total Price
1 1000	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
2 1000	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
3 1100	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
4 1100	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
5 1200	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
6 1300	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
7 1400	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
8 1500	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
9 1600	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
10 1700	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
11 1800	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
12 1900	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00
13 2000	87400207279	Instructional Materials	100	100.00	100.00	100.00	100	100.00	100.00

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Continuing Adoptions...

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

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

Continuing Adoptions...

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

The screenshot shows the 'Requisition - Continuing Adoptions - EMAT' interface. At the top, there are fields for 'Quantity' and 'Standard Price'. Below these, there are summary statistics: 'This Requisition' and 'Remaining Balance'. At the bottom, there are two summary boxes: 'Total TEA Paid to Publishers' and 'Total TEA Paid to Districts'. A large black arrow labeled '8' points to the 'Quantity' field, and another black arrow labeled '7' points to the 'Total TEA Paid to Districts' box.

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

Continuing Adoptions...

9. To review the requisition before submitting, click on the **View/Print Requisition Summary**.

TEXAS EDUCATION AGENCY
Requisition Summary
 Advertiser: Continuing Adoptions - ELMAT
 Order Number: 0707000702
 Order Date: 07/25/2011
 Last Updated: 08/04/2011 10:10:11 AM
 Expires: 08/04/2011

Item #	Item	Unit Price	Quantity	Total Price	Order Total	Order Total
001	001	0.00	0	0.00	0.00	0.00
Total TEA paid to Publisher: \$0.00						
Total TEA paid to Publisher: \$0.00						

Requisition Summary
 Order Number: 0707000702
 Order Date: 07/25/2011
 Last Updated: 08/04/2011 10:10:11 AM
 Expires: 08/04/2011

Item #	Item	Unit Price	Quantity	Total Price	Order Total	Order Total
001	001	0.00	0	0.00	0.00	0.00
Total TEA paid to Publisher: \$0.00						
Total TEA paid to Publisher: \$0.00						

Continuing Adoptions...

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

Select a Delivery Address		Requisition Information	
Delivery Address: 078908002 ELMAT Delivery Point: 16417 HWY 36 NEEDVILLE TX 77461		Last Updated By: Lany Sims 07/25/2011 10:10AM	
Select a Ship Date	View/Print Options	Financial Information	
Shipping Date: 08/04/2011 Select an available Shipment Date	View/Print Requisition Summary View/Print Order List	Total TEA Paid to Publisher(s): \$0.00 Total TEA Paid to District: \$0.00	

10
 To submit your requisition, you must enter your orders on the Grade level tabs above, select a Delivery Address and a Shipment date, and click "Submit to TEA". Your requisition will be processed after TEA approval.
 To save your requisition without submitting, click "Save Work". You can then come back later to complete and submit the requisition.
 To cancel your requisition, click "Cancel Requisition". Cancelled requisitions will not be processed. A requisition cannot be cancelled or changed after it has been submitted to TEA.

Continuing Adoptions...

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

Requisition ID	Status	Requisition Type
990047319	Submitted	New Adoption

4. Supplemental Requisition

Supplemental Requisition...

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

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

Requisition ID	Requisition Type	Requisition Status
REXT	EM - Allotment - Supplemental - Large Type	Create New Requisition
REXT	EM - Allotment - Supplemental - Large Type	Create New Requisition
REXT	EM - Allotment - Supplemental - Large Type	Create New Requisition

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Supplemental Requisition...

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

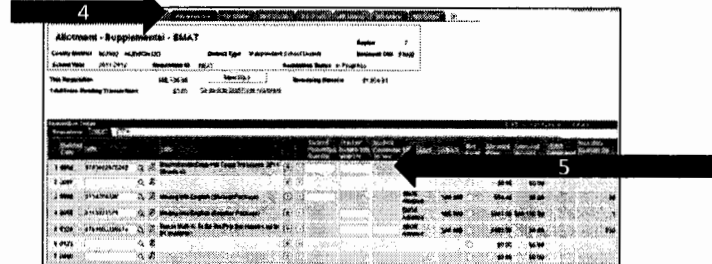
Item	Amount	Total
This Requisition	\$0.00	
Total from Pending Transactions	\$0.00	\$0.00
Total TEA Paid in Palmyra		\$0.00
Total TEA Paid to District		\$0.00

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

Supplemental Requisition...

4. Click on the Kindergarten tab.



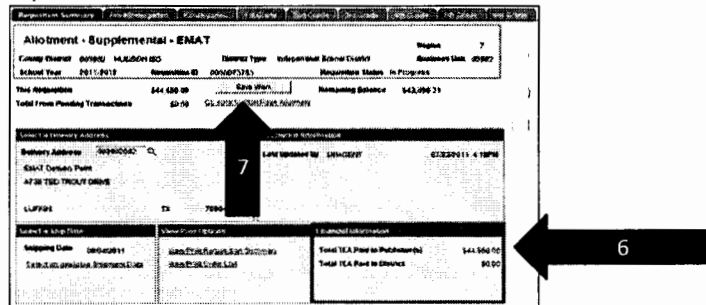
5. Enter the **Student Requisition Quantity** and the **Teacher Requisition Quantity** for each New Adoption item you would like to order. For your reference, several informational columns are shown to the right of the quantity columns:

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

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Supplemental Requisition...

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




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

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Supplemental Requisition...

8. To review the requisition before submitting, click on the **View/Print Requisition Summary**.



TEXAS EDUCATION AGENCY

Requisition Summary

Alterment - Supplemental - EMAT

District / Charter: 00990334CD9000 DD
 Requisition ID: 0000073743
 Status: In Progress
 Last Updated by: DBAGENT/2011-07-22 21:18:13
 Reported Ship Date: 06/04/2011

SROE Adopted
 Depository: Publisher:
 Hargrave Mills Harvest Depository

ITEM	QUANTITY	UNIT PRICE	TOTAL PRICE	STATUS	REASON	REMARKS	DATE	USER
Total TEA paid to Publisher: Hargrave Mills Harvest Depository 144,800.00 *Total Due from District to Publisher: Hargrave Mills Harvest Depository 14.99								
Total TEA paid to All Publishers 144,800.00 Total TEA paid to District \$0.00								

*If an amount appears next to "Total TEA paid to District", the school district or open-enrollment charter school is responsible for paying that amount directly to the selected publisher(s) under Payment should not be sent to TEA. District will receive a payment from TEA, but will be responsible for ordering the material and paying the designated publisher depository directly.

Created on 7/22/2011 14:20 PM Page 1 of 1

Supplemental Requisition...

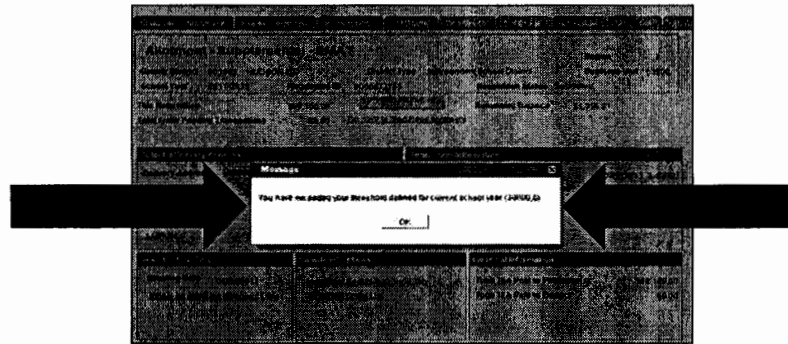
9. When all requisition information is entered and saved, click on the **Submit to TEA** button to submit the requisition for processing.

Select a Delivery Address		Requisition Information	
Delivery Address: 078908002 EMAT Delivery Point 18417 HWY 36 NEEDVILLE TX 77461		Last Updated By: Larry Sims 07/25/2011 10:19AM	
Select a Ship Date	View/Print Options	Financial Information	
Shipping Date: 08/04/2011 Select an available Shipment Date	View/Print Requisition Summary View/Print Order List	Total TEA Paid to Publisher(s): \$0.00 Total TEA Paid to District: \$0.00	

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

Supplemental Requisition...

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



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Supplemental Requisition...

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

Requisition ID	Last Updated	Amount Paid Type	Status
0000073753	07/22/11	Allotment - Supplemental - EMAT	Submitted
0000073758	07/22/11	Miscellaneous - Subscription Renewals - EMAT	Complete
0000073759	07/22/11	Allotment - New Adoptions - EMAT	Complete
0000073762	07/22/11	Allotment - Continuing Adoptions - EMAT	Complete

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5. Allotment Disbursements

Allotment Disbursements

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

**Key Points Regarding
Allotment Disbursements**

- Allotment Disbursement transactions are validated against the districts' remaining allotment balance throughout the year.
- Allotment Disbursement transactions can be used to order non state-adopted Instructional materials, Technology Equipment and Technology Services.

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**Key Points Regarding
Allotment Disbursements...**

- Allotment Disbursements are controlled by TEA administrators and they activate/deactivate the allowable Disbursement Types and Categories.
- TEA Administrators approve the Allotment Disbursement transactions prepared by the districts. After approval, payments are made directly to the districts.

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Allotment Disbursements

To access the Allotment Disbursement Summary:

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

The screenshot shows a web interface for Round Rock ISD. At the top, it displays 'Select a School Year: 2011-2012' and 'District/Charter: 246909 ROUND ROCK ISD'. Below this, there are several informational sections and a 'NEXT' button. A black arrow labeled '1' points to the 'Allotment Disbursement' link in the top right corner of the page.

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Allotment Disbursements...

2. The Allotment Disbursement Summary Page is displayed.

The screenshot shows the 'Allotment Disbursement Summary' page. At the top, it displays 'County District: 246909 ROUND ROCK ISD' and 'Region: 13'. Below this, there is a summary table for disbursements. A black arrow labeled '3' points to the 'NEXT' link in the table.

Summary	
County District: 246909	ROUND ROCK ISD
Business Unit: F4909	District Type: Independent School District
Region: 13	Status: ACTIVE

Disbursements			
Completed Disbursements	\$438.54	Pending Disbursements	\$1,500.00
		Remaining Balance	\$1,581,000.00

Amount	NEXT	Transaction Date	Disbursement Type	Status
2 2011-2012	NEXT		Create New Disbursement	
3 2011-2012	D800020328	07/18/2011	Technology Services	Completed
4 2011-2012	D800020331	07/18/2011	Instructional Materials	In Progress
4 2011-2012	D800020332	07/18/2011	Technological Equipment	Submitted
5 2011-2012	D800020329	07/18/2011	Instructional Materials	Completed

3. Allotment Disbursement Summary Page displays the list of Allotment Disbursement transactions with different Statuses such as In Progress, Submitted and Completed. To create a new Allotment Disbursement transaction, click on **NEXT** link.

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Allotment Disbursements...

4. If a district wants to continue its In-Progress Allotment Disbursement transaction, the district clicks on the **Transaction ID** link, so that the **Allotment Disbursement Page** is displayed.

Summary					
County District	246909	ROUND ROCK ISD	Region	13	
Business Unit	F6909	District Type	Independent School District	Status	Active
Disbursements					
Completed Disbursements	\$888.68	Pending Disbursements	\$1,500.00	Remaining Balance	\$4,581,000.00
School Year	NEXT	Transaction Date	Disbursement Type	Status	
1 2011-2012	NEXT		Create New Disbursement		
2 2011-2012	D000028928	07/18/2011	Technology Services	Completed	
3 2011-2012	D000028831	07/18/2011	Instructional Materials	In Progress	
4 2011-2012	D000028829	07/18/2011	Technological Equipment	Submitted	
5 2011-2012	D000028828	07/18/2011	Instructional Materials	Completed	

Go back to Start Page Allotment

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Allotment Disbursements...

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

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Allotment Disbursements...

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

The screenshot shows a web application interface for 'Allotment Disbursements'. At the top, there are fields for 'Client Name: 14394', 'NOUNSCHOOL NC', and 'Region: 12'. Below this, 'Disbursement Type: Indirect-Cost Support Contract' and 'Business Unit: F-000' are visible. The 'School Year' is '2011-2012', 'Transaction ID' is 'D00000021', and 'Transaction Status' is 'Approved'. A summary section shows 'This Disbursement: \$0.00' and 'Remaining Balance: \$142,500.00'. A table below lists 'Allotment Detail' with columns for 'Line Item to Update', 'Certified By', and 'Certified Date'. At the bottom of the page, a 'Cancel Disbursement' button is highlighted with a black arrow pointing to it, and the number '6' is written below the arrow.

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6. Allotment Disbursements Transactions

Allotment Disbursements Transactions

There are three different Allotment Disbursement type transactions in EMAT:

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

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1. Instructional Materials

1. Instructional Materials Disbursement

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

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

The screenshot shows the 'District Start Page' for Round Rock ISD. In the left-hand navigation menu, the 'Allotment Disbursement' link is highlighted with a black arrow labeled '1'. Other menu items include 'Home', 'My Profile', 'My Alerts', 'My Calendar', 'My Documents', 'My Reports', 'My Settings', 'My Tools', 'My Workspaces', 'My Lists', 'My Favorites', 'My Recent Items', 'My Shared Items', 'My Recent Items', 'My Shared Items', 'My Recent Items', 'My Shared Items'.

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Instructional Materials Disbursement...

2. The Allotment Disbursement Summary page is displayed.

The screenshot shows the 'Allotment Disbursement Summary' page. At the top, it displays 'County District: 246908 ROUND ROCK ISD' and 'Region: 15'. Below this, it shows 'Business Unit: F9909' and 'District Type: Independent School District'. The main section is a table with columns for 'Transaction ID', 'Transaction Date', 'Transaction Type', and 'Status'. A black arrow labeled '3' points to the 'Next' link in the 'Transaction ID' column of the first row.

Transaction ID	Transaction Date	Transaction Type	Status
1 2011-2012	07/18/2011	Creates New Disbursement	Completed
2 2011-2012	07/18/2011	Technology Services	Submitted
3 2011-2012	07/18/2011	Instructional Materials	Submitted
4 2011-2012	07/18/2011	Technical Equipment	Submitted
5 2011-2012	07/18/2011	Instructional Materials	Completed

3. Click **Next** link under the Transaction ID field.

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Instructional Materials Disbursement...

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

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Instructional Materials Disbursement...

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

Disbursement Categories are:

- Bilingual Materials
- Open Source
- Supplemental Materials

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Instructional Materials Disbursement...

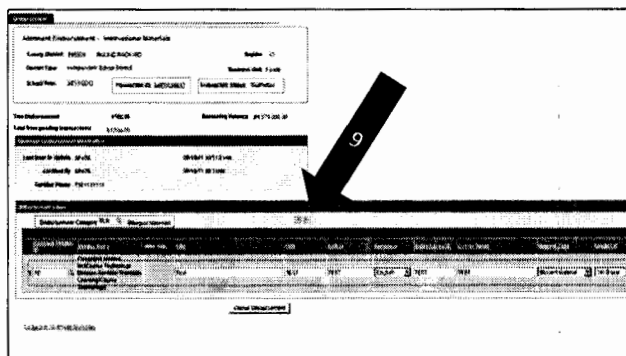
7. New Grid under **Disbursement Lines box** is displayed which allows the user to enter the data for the Instructional Materials items to be ordered.

8. User is required to enter the following fields:

- | | |
|------------------|-----------------|
| - Publisher | - Copyright |
| - Title | - Edition |
| - ISBN | - Media format |
| - Author | - Material Type |
| - Subject | - Language |
| - Grade | - TEKS% |
| - Course | - Quantity |
| - Student Served | - Unit Price |

Instructional Materials Disbursement...

9. User can add additional Instructional Materials by clicking on the plus "+" sign to add another line.



Instructional Materials Disbursement...

10. Once the User enters all the required fields, user selects **Save Work** button. New transaction ID is generated, when the work is saved.

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

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Instructional Materials Disbursement...

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

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

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2. Technological Equipment Disbursement

Technological Equipment Disbursement

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

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

Transaction Type	Next Action
Request - Computers	Create New Request
Request - Hardware	Create New Request
Request - Software	Create New Request
Request - Equipment	Create New Request

Technological Equipment Disbursement...

- The Allotment Disbursement **Summary** page is displayed
- Click **Next** link under the Transaction ID field

Summary

County District: 240009 ROUND ROCK ISD Region: 13
 Business Unit: F8909 District Type: Independent School District Status: Active

Disbursements

Completed Disbursements: \$882.68 Pending Disbursements: \$1,500.00 Remaining Balance: \$4,581,000.00

Transaction ID	Transaction Date	Disbursement Type	Status
1 2011-2012	07182011	Create New Disbursement	
2 2011-2012	07182011	Technology Services	Completed
3 2011-2012	07182011	Instructional Materials	In Progress
4 2011-2012	07182011	Technological Equipment	Submitted
5 2011-2012	07182011	Instructional Materials	Completed

Go back to Start Page Allotment

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Technological Equipment Disbursement...

- Allotment Disbursement type Page is displayed. Select **Technological Equipment** option from the dropdown list and click **OK** button.

Please select the allotment disbursement type and then click OK

Allotment Disbursement type:

Disbursement Transaction Type:

OK Cancel

Instructional Materials
 Technological Equipment
 Technology Services

4

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Technological Equipment Disbursement ...

5. Allotment Disbursement page for Technological Equipment is displayed
6. Select the appropriate Disbursement category by clicking the magnifying glass icon.

Technological Equipment

Allotment Disbursement - Technological Equipment

County Office: 24635A ROCKY ROCK, ILL Program: 03

District Type: Independent School District Business Unit: 75400

School Year: 2011-2012 Transaction ID: 1011 Transaction Month: 10-10-2011

This Disbursement: \$: 50 Remaining Balance: \$4,071,000.00

Total Item pending Disbursement: \$6,500.00

Additional Credit/Debit information:

Last Year by Student

Controlled By

Controlled Month

Disbursement Categories

 6

Go Back to Allotment Disbursement

Disbursement Categories are as follows:

- Desktop
- eBook
- Learning Lab
- Laptop
- Tablet
- Whiteboard
- Workstation

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Technological Equipment Disbursement ...

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

Student Served
Administrators Served
Manufacturer
Primary Use
Grade, Quantity
Unit Price.

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Technological Equipment Disbursement ...

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

The screenshot shows a web-based form for 'Allotment Disbursement - Technological Equipment'. At the top, it displays 'County District: 079996 NEEDVILLE ISD', 'District Type: Independent School District', and 'Business Unit: 47906'. Below this, there are fields for 'Transaction ID: D003019657' and 'Transaction Status: In Progress'. A 'Save Work' button is visible. Below the button, there is a section for 'Abstract Disbursement Information' with fields for 'Last User to Update: Larry Sims', 'Certified By', and 'Certifier Phone'. At the bottom, there is a table with the following data:

Disbursement Category	Grade	% of Students	% of Allotment	Primary Item	Manufacturer
1 APPLE IPAD	K-12	1000	2000	All Subjects	Apple

Arrows labeled '9' and '10' point to the 'Save Work' button and the table respectively.

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Technological Equipment Disbursement ...

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

The screenshot shows the same form as above, but with the 'Certify & Submit' button highlighted. The 'Transaction ID' is now 'D003019657' and the 'Transaction Status' is 'In Progress'. The 'Save Work' button is no longer visible. The 'Abstract Disbursement Information' section shows 'Last User to Update: Larry Sims' and 'Certified By' and 'Certifier Phone' fields. The table at the bottom is the same as in the previous screenshot:

Disbursement Category	Grade	% of Students	% of Allotment	Primary Item	Manufacturer
1 APPLE IPAD	K-12	1000	2000	All Subjects	Apple

An arrow labeled '11' points to the 'Certify & Submit' button.

90

Technological Equipment Disbursement ...

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

Certify Requisition

By clicking the Certify and Submit you are certifying that funds paid out by T&E will be used to purchase the items selected. Please provide your phone number below if you T&E needs to contact you about this order. Thank you the OK button. Thank you.

Enter phone number (optional)

OK Cancel

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

3. Technological Services Disbursement

Technological Services Disbursement...

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

- Allotment Disbursement page for **Technology Services** is displayed.

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Technological Services Disbursement...

- Select the appropriate **Disbursement category** by clicking the magnifying glass icon.

Disbursement Categories:

- Professional Development
- Contracted Services
- Lease Equipment
- Capital Outlay
- Supplies & Materials
- Salary
- Other Operating Expenditures

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Technological Services Disbursement...

7. New Grid under **Disbursement Lines** box is displayed which allows the user to enter the data for the Technology Services to be ordered.
8. User is required to enter **Description of the Service, Quantity and Unit Price.**

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Technological Services Disbursement...

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

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Technological Services Disbursement...

11. Once the user entry is complete, certify the transaction by clicking **Certify & Submit** button.
12. **Certify Requisition** page is displayed. Enter the phone number to certify the transaction and click OK button.

Certify Requisition

By clicking on Certify and Submit, you are certifying that funds paid out by T&E will be used to purchase the items selected. Please provide your phone number below in case T&E needs to contact you about the order. Then click the OK button. Thank you.

Letterhead: 014 115 010

OK Cancel

12

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

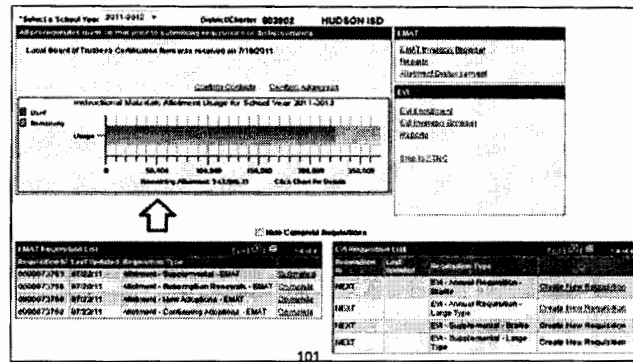
7. Allotment Inquiry and Reports

Allotment Inquiry and Reports...

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

To review district allotment balance and transaction information online:

1. From the District Start Page, double-click the Allotment graph bar in the left center of the page.



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Allotment Inquiry and Reports...

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

Allotment Summary			
County District	002802	HUDSON ISD	Region 7
Business Unit	02802	District Type	Independent School District
		Status	Active
School Year 2011-2012 Go Back to Start Page Allotment			
Instructional Materials Allotment Summary			
2011-2012 Allotment	\$284,364.51	Total Allotment	\$288,380.29
Prior Year Carryover	\$16.78	Requisitions:	
Adjustments	\$6.00	Completed	\$-180,233.98
		Pending	\$-44,550.00
Total Allotment	\$288,380.28	Disbursements:	
		Completed	\$0.00
		Pending	\$-1,200.00
		Allotment Used	\$-225,983.98
		Allotment Remaining	\$42,396.31

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Allotment Inquiry and Reports...

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

TEXAS EDUCATION AGENCY				
Allotment Report				
HUDSON ISD				
District Cluster: 403401				
School Year: 2011-2012				
Transaction Type	Date	Transaction ID	Description	Amount
Allotment	06/08/2011	000012825	Allotment - FY 2011-2012	\$1,083,384.51
Post Year Balance	06/09/2011	1,000,000,000	Current Balance	512,791
Total Allotment				\$1,083,897.29
Allotment Requisition	07/20/2011	000001318	Allotment - Subscription Renewals - EMAT	96,146.20
Allotment Requisition	07/21/2011	000001319	Allotment - New Alpha - EMAT	(51,000.52)
Allotment Requisition	07/22/2011	000001376	Allotment - Continuing Alpha - EMAT	96,884.32
Total Allotment Requisitions				\$141,030.00
Vendor Disbursement	07/22/2011	D00001246	Telestrategies Requisition	(11,300.00)
Total Disbursed (Disbursement)				(11,300.00)
Pending Requisition	07/22/2011	000001703	Allotment - Supplemental - EMAT	(54,596.00)
Total Pending Requisitions				(54,596.00)
Remaining Allotment				\$18,271.29

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QUESTIONS????