<table>
<thead>
<tr>
<th>Version</th>
<th>Date Posted</th>
<th>Date of Change</th>
<th>Description</th>
</tr>
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<tr>
<td>0.7</td>
<td>09/26/11</td>
<td>09/26/11</td>
<td>Changed date to today’s date. Fixed footer date. Sent for posting.</td>
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<tr>
<td></td>
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<td>09/23/11</td>
<td>Incorporated G. King’s changes to bring FAQs up to October 2011 collection changes. Updated and edited all sections of document. Incorporated J. Zilewicz changes: A.8 – Changed second sentence to “Starting in October 2010, the EPIMS collection will be held in October and June.” Removed “March” and “to coincide with all 3 SIMS collections. B.7 – Deleted. E.1 – Second sentence, removed “entry of” and replaced with “edit tool for updating.” E.3 – Deleted. G.2 – added sentence “Name changes must match name in ELAR.” K.1 – Deleted. K.2 – Modified to “Is the EPIMS data used for the school report card?” This is K.1 now. O.3 – Removed sentence “The SIMS application no longer accepts advanced placement course codes.” O.4 – Replaced with new text for reporting virtual teachers. S.3 – removed typo. T.2 – Deleted.</td>
</tr>
<tr>
<td>0.6</td>
<td>08/18/11</td>
<td>07/21/11</td>
<td>Reformatted footers. Updated cover date. Light edit. Added the text, ‘…requiring an equal amount of the instructor’s time…’ to Section R – Assigning FTEs (WA12) for R1, R2, and R3. Updated T1 with new NCES text.</td>
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<tr>
<td>0.5</td>
<td>04/15/11</td>
<td></td>
<td>Removed duplicate question: <em>How will we report co-teachers, team teaching or job sharing assignments in EPIMS?</em> under the ‘Miscellaneous Questions’ section. Updated cover page.</td>
</tr>
<tr>
<td>0.4</td>
<td>04/08/11</td>
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<td>Added new question under <strong>N. Job Classification &amp; Assignment (WA07 &amp; WA08)</strong> – <em>N5 - How will we report co-teachers, team teaching or job sharing assignments in EPIMS?</em> Updated TOC and cover page.</td>
</tr>
<tr>
<td>Version</td>
<td>Date</td>
<td>Changes</td>
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<tr>
<td>0.3</td>
<td>10/01/10</td>
<td>Fixed 15 broken links. Updated cover date to October 1, 2010. Updated Headers and Footers. (Misspellings and date). Quick sweep up of typos and format errors.</td>
<td></td>
</tr>
<tr>
<td>0.2</td>
<td>07/09/10</td>
<td>Light edit.</td>
<td></td>
</tr>
<tr>
<td>0.1</td>
<td>06/1/10</td>
<td>Reformatted FAQs in standard doc template, with Revision History. Provided new section headings and content updates for EPIMS and DSSR/School Report Card, Date of Hire (SR11), Federal Salary Source (SR12, SR14, SR16), Job Classification &amp; Assignment (WA07 &amp; WA08), Subject Area Course Codes (WA10), Class Section (WA11), Term and Term Status, Assigning FTEs (WA12), Highly Qualified Teacher (HQ) Status (WA14) and Subject Matter Competency (SMC) (WA15), Middle Schools, Career/Vocational Technical Education (CVTE), and Miscellaneous Questions. Fixed minor typo and broken links in Section Q.</td>
<td></td>
</tr>
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A. Background

A.1 What is EPIMS?

EPIMS stands for the Education Personnel Information Management System, a data collection developed by the Department of Elementary and Secondary Education to collect individual educator data, from all public school districts and charter schools. The data collected is linked with the licensure data, which the Department currently maintains in ELAR, the Educator Licensure and Recruitment database.

A.2 Why is the Department developing this system?

State and federal reporting requirements and requests for information are detailed and complex. Collecting individual data allows the Department to aggregate the data in many different ways and to do so consistently across all districts. In addition to meeting federally mandated NCLB highly qualified teacher reporting requirements, the Department uses this data to understand what is working and what is not and to identify shortage areas and plan for the future. Some examples of the questions being asked include:

- What type of licenses do middle school teachers typically have?
- How many educators are nearing retirement age?
- What percentage of new staff stays for more than one year? Does that vary across districts?

A.3 How were districts involved with the development of EPIMS?

In the fall of 2005, the Department sought input from all districts via an online survey. The survey collected information from districts on what data they currently maintained, how the data was stored, and other general information and feedback. Beginning in January 2006, the Department worked closely with a pilot group of districts to develop the design of the system and the online tools. The pilot districts submitted data to the Department in the fall of 2006.

A.4 What types of support are available to districts?

The Department assigns data collection support specialists to provide training and targeted district assistance.

A.5 Which staff are reported in this data collection?

All district staff should be reported in EPIMS, except for those serving in Service, Operations, Maintenance, and Coaches.
A.6 How often does this data collection occur?

Initially, the EPIMS collection was held annually to coincide with the SIMS October 1 collection. Starting in October 2010, the EPIMS collection began to be held in October and June. These EPIMS collections are cumulative throughout the school year. That is to say, each EPIMS collection will report the classes taught during the active term, at the time of the collection, and the courses completed previously during the school year.

B. Data Access & Usage

B.1 Who will have access to this data?

Aggregate data are accessible via the Department's website. More detailed data are made available upon request. This data collection does not make anything public that was not already public information, and is accessible via a request to the districts and charter schools. The Massachusetts Public Records law requires the Department of Elementary and Secondary Education to provide, upon request and within statutory constraints, a copy of any public record that the Department maintains. Within every district, individuals are assigned security roles by the district's Directory Administrator, for collecting and submitting EPIMS data.

B.2 Is it legal for the Department to collect information such as date of birth and race/ethnicity?

Pursuant to Massachusetts General Laws, Chapter 69, Section 1I, the Department is authorized to collect date of birth and race/ethnicity data but cannot make such information public. The Department will report this data only in the aggregate.

B.3 For what purposes does the Department use the educator race data?

The Department uses data on the races of school and district staff, only in the aggregate. The Department anticipates using the data to analyze the impact of policy decisions on issues such as the diversity of the Massachusetts educator workforce. The Department also plans to use the aggregated data to help schools and districts to recruit, hire, and support a diverse educator workforce. In addition to meeting the requirements of Massachusetts law, collecting the data through EPIMS will also assist in complying with U.S. Department of Education (USDE) requirements. Each year, the Department is required to submit a wide range of education data to the USDE, as part of the EDFacts data initiative via the Education Data Exchange Network (EDEN). (For further information on EDFacts and EDEN, please see [http://www.ed.gov/about/initiatives/edpdmi/index.html](http://www.ed.gov/about/initiatives/edpdmi/index.html) ) Staff race data has been collected as part of the EDFacts initiative for some years, and the EPIMS data collection will enable the Massachusetts ESE to provide this data to the USDE in future.
data collections, to the extent required.

B.4 How can schools/districts collect the race and ethnicity data regarding staff?

The Department suggests that districts ask staff to self-report and has prepared a sample letter and self-report form to be provided to staff. For staff who decline to submit a self-report, the district can rely on employment records or visual surveys to complete the required reports.

B.5 Are districts able to generate reports from this data?

Yes, districts are able to access a number of standard reports based on their own school and district data.

B.6 Does this collection result in enforcing personnel licensure in districts?

In keeping with current practice, if a problem regarding licensed personnel is identified, the Department will work with districts to correct the problem. It is the responsibility of districts to ensure that all personnel are properly licensed.

B.7 Can the ESE track graduates of educator prep programs and determine whether they are currently employed in MA public schools?

Yes. It is the Department's goal to match information from this data collection, with the Department's present database of program completions.
C. UNIQUE IDENTIFIER: MEPID (MASSACHUSETTS EDUCATION PERSONNEL ID)

C.1 Are educators assigned a unique ID for the purposes of this collection?

Yes, the Department does assign a permanent unique ID, the Massachusetts Education Personnel ID, or MEPID, to all staff members reported in this collection. The ID helps ensure data accuracy and integrity and allows the Department to track personnel across districts and over time.

C.2 Does the Department allow MEPIDs to be assigned for staff not reported in EPIMS, so that local systems can use MEPIDs in their local systems for all employees?

Yes, the Department plans to allow districts to request MEPIDs for all staff, even if data are not collected on all staff.

C.3 When an educator moves is the old MEPID used in the new district?

Yes, each educator has a unique MEPID that is assigned once and follows the educator throughout his or her career in Massachusetts public schools.

C.4 Can education personnel know their own MEPID?

Districts are able to look up MEPIDs in EPIMS. Individuals are able to retrieve their MEPIDs from ELAR if their data has been successfully linked to ELAR.

C.5 Does the ESE collect local educator IDs?

Yes. The ESE includes local ID numbers as a field in EPIMS records so that districts can use them to link EPIMS data to their local databases. These are included for district use only. The Department strongly advises school districts not to use social security numbers in the local employee field.

C.6 If the idea is to have one staff roster record per MEPID, does an individual need more than one record, if they work in multiple districts?

The ESE requires one staff roster record per MEPID, per district. The system does allow for cases where individuals work in more than one district in the same reporting period, by allowing multiple staff roster records per MEPID, if they are submitted by different districts.
D. Data Elements

D.1 What data are collected through EPIMS?

The Department has worked with pilot districts to determine the data elements to be collected. These are available in the EPIMS Data Handbook posted on the EPIMS homepage http://www.doe.mass.edu/infoservices/data/epims/.

D.2 Will additional data elements be phased in?

Although it is possible that new data elements may be added in the future in response to changing requirements, the Department's goal is to give timely notice of any changes.

D.3 How are differences between the Department's terminology and district terminology resolved, for instance, in the way the Department defines "job position" vs. how districts may define it?

As is done with other Department data collections, data standards have been established and shared with the districts. These standards were developed in collaboration with the pilot group. The EPIMS Data Handbook has been published and posted on the ESE web site that includes the definitions and acceptable values for each data element.

E. Data Collection Process

E.1 How do districts submit the data?

Districts submit the data electronically through the ESE Security Portal. There are two options for submitting the data: a text file upload (similar to SIMS), and an online data edit tool for updating individual records.

E.2 Will there be an October 1 snapshot, like the District & School Staffing Report?

Yes, the data reported is as of October 1 to meet federal reporting requirements. However, knowing that some of the same staff who report SIMS data will likely be involved in this collection, the Department will expand the EPIMS data collection period to the end of December.

E.3 Does the ESE have a compliance process for software systems?

The ESE intends to provide an EPIMS software compliance process, similar to the SIMS vendor compliance process, as time and resources permit.
F. Whom to Report

F1. Whom to Report?

Everyone except maintenance/operations, coaches, and short-term subs, are reported in EPIMS.

Below is a list of job titles compiled in response to queries from districts. This is NOT a comprehensive list of job titles that should be reported in EPIMS. This list provides EPIMS codes for specific job titles as published in Appendix E of the EPIMS Data Handbook, or identifies the job titles, as "not reported in EPIMS." If you do not see a job title in this list, you may find it in Appendix E. You can sort this list by job title or EPIMS code.

<table>
<thead>
<tr>
<th>Job Title (may vary in districts)</th>
<th>EPI MS Job Classification (see Data Handbook: Appendix E)</th>
<th>EPI MS Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aides that work for lunch/recess</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
<tr>
<td>A/V Technician</td>
<td>Information Services &amp; Technical Support</td>
<td>6140</td>
</tr>
<tr>
<td>Clerical staff</td>
<td>Administrative Clerks &amp; Secretaries</td>
<td>6110</td>
</tr>
<tr>
<td>Custodial staff</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
<tr>
<td>Director of Post Secondary Education</td>
<td>Supervisor/Director/Coordinator of Professional Development</td>
<td>1225</td>
</tr>
<tr>
<td>Family Liaison</td>
<td>Other Administrative Support</td>
<td>6150</td>
</tr>
<tr>
<td>Financial Aid consultant</td>
<td>Other School Administrator</td>
<td>1320</td>
</tr>
<tr>
<td>Food service staff, cafe workers</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
<tr>
<td>Guidance Counselor</td>
<td>Guidance Counselor</td>
<td>3329</td>
</tr>
<tr>
<td>High School Sports Equipment Handler</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
<tr>
<td>Instructional Aides: part time</td>
<td>Paraprofessional</td>
<td>4100</td>
</tr>
<tr>
<td>Librarians</td>
<td>Librarians and Media Center Directors</td>
<td>3330</td>
</tr>
<tr>
<td>Long Term Subs (minimum time in classroom = 30 consecutive calendar days)</td>
<td>Long Term Substitute Teacher</td>
<td>2325</td>
</tr>
<tr>
<td>Maintenance staff</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
<tr>
<td>Nurses</td>
<td>School Nurse — Non-Special Education and/or School Nurse — Special Education</td>
<td>5020 and/or 5021</td>
</tr>
<tr>
<td>Nursing Director Post Secondary Education</td>
<td>School Nurse Leader</td>
<td>1226</td>
</tr>
<tr>
<td>Paraprofessionals in the classroom</td>
<td>Paraprofessional</td>
<td>4100</td>
</tr>
<tr>
<td>Position</td>
<td>Job Title</td>
<td>Code</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Paraprofessionals in the main office</td>
<td>Administrative Aides</td>
<td>6100</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>Physical Therapist</td>
<td>3431</td>
</tr>
<tr>
<td>Physician</td>
<td>Physician</td>
<td>5010</td>
</tr>
<tr>
<td>Psychiatrist</td>
<td>Psychiatrist</td>
<td>5015</td>
</tr>
<tr>
<td>School Business Officer</td>
<td>School Business Official</td>
<td>1202</td>
</tr>
<tr>
<td>School Psychologist: part time</td>
<td>School Psychologist — Non-Special Education and/or School Psychologist — Special Education</td>
<td>3360 and/or 3361</td>
</tr>
<tr>
<td>Secretaries (district): full and part time</td>
<td>Administrative Clerks &amp; Secretaries</td>
<td>6110</td>
</tr>
<tr>
<td>Secretaries (school): full and part time</td>
<td>Administrative Clerks &amp; Secretaries</td>
<td>6110</td>
</tr>
<tr>
<td>Secretary to the Director of Post Secondary</td>
<td>Administrative Clerks &amp; Secretaries</td>
<td>6110</td>
</tr>
<tr>
<td>Superintendent</td>
<td>Superintendent of Schools</td>
<td>1200</td>
</tr>
<tr>
<td>Supervisor of Bus Drivers</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
<tr>
<td>Teacher</td>
<td>Teacher</td>
<td>2305</td>
</tr>
<tr>
<td>Teacher Aid: part time/hourly</td>
<td>Paraprofessional</td>
<td>4100</td>
</tr>
<tr>
<td>Teachers teaching post-graduate classes</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
<tr>
<td>Technology Director</td>
<td>Supervisor/Director/Coordinator: Technology</td>
<td>1224</td>
</tr>
<tr>
<td>Technology/Network Staff</td>
<td>Information Services &amp; Technical Support</td>
<td>6140</td>
</tr>
<tr>
<td>Transportation Staff</td>
<td>Not Reported in EPIMS</td>
<td>N/A</td>
</tr>
</tbody>
</table>
F.2  **Do we need to report contracted staff?**

If the job title of the person falls under one of the job classifications identified in Appendix E of the EPIMS Data Handbook, the contracted employee should be reported.

F.3  **Do we need to report adult education / alternative education teachers in EPIMS?**

Adult education teachers should not be reported in EPIMS. Alternative education teachers should be reported in EPIMS, if the program is funded by the district. If the program is funded by a collaborative or other outside source, but housed in the district, then the teachers should not be reported in EPIMS.

F.4  **Do districts need to submit a work assignment record in October for teachers who have exited during the summer?**

No. If a teacher has exited the system before October 1st, only a staff roster record with the appropriate exit information is required.

F.5  **What are the reporting requirements for Work Assignment (WA) records for exited staff during a school year?**

Some SIS do not provide a history or don’t allow two teachers assigned to the same course, during the same year.

Districts must provide WA records for exited staff, within a school year, if their SIS supports this capability. We realize that some SIS will not be able to retain this information, if an individual exits and is replaced in the identical work assignment (including the identical course, section, term for teachers), so we will not require that these work assignments be reported. All work assignments for exited employees that are not replaced in the identical work assignments within the school year must be reported.

F.6  **Are WA records required for staff members that are on and off leave repeatedly?**

Yes. The reporting requirements for staff that are on leave repeatedly are the same as for exited staff. Districts must provide WA records for these employees within a school year, unless the work assignment is replaced by an identical work assignment.
F.7  Do we have to report permanent subs that are assigned to a building, not a class?

Permanent subs who are not assigned to a specific class but fill in where needed on a daily basis, should not be reported in EPIMS. Long-term subs—individuals who are called in to replace specific teachers out on leave—should be reported.

G. Name Changes

G.1 Is a paper form required to change an individual's name in EPIMS?

No. Names are changed in EPIMS under the section header for ID Maintenance, and no paper trail is required.

G.2 How do we submit a name change in EPIMS? What if the name has changed from when the teacher got a license?

Name changes in EPIMS are handled through the Update Characteristics section of the ID Maintenance application. They are treated no differently from other changes that are made to an individual's identifying MEPID characteristics. No additional documentation needs to accompany the change. The only rule with making updates is that no more than two changes can be made to an individual's MEPID record, in any two-month period. A name change must match the name in ELAR.

G.3 If a name is changed in EPIMS, is it updated in ELAR?

No. It is an educator's responsibility to update her/his individual information in ELAR. Districts should encourage educators to maintain their ELAR profiles and make all necessary updates. The information in both EPIMS and ELAR should always reflect an individual's legal name.
H. LICENSE NUMBER

H.1 How do I use the license numbers to assign MEPIDs to the people in my district if their ELAR profiles are out of date or inaccurate?

License numbers need to be entered by districts at the time of assigning MEPIDs, but the ability to assign MEPIDs is not dependent on the license numbers. EPIMS and ELAR are linked for the purpose of obtaining degree information for licensed personnel.

H.2 How do we obtain degree information from ELAR in order to complete the fields SR18–SR26 for our certified staff?

You do not need to enter degree information for certified staff. If you are entering an ESE license number in SR03, you can enter "not applicable" in SR18–SR26. EPIMS and ELAR are linked for the purpose of obtaining degree information for licensed personnel, and the degree information is obtained by the ESE from ELAR.

H.3 How can we obtain licensure information for our staff?

School district staff can access licensure information by using the Educator Licensure Status Drop Box application. This file exchange drop box enables districts to retrieve ELAR license numbers, licensure status, waiver information, and the levels and types of licenses held, by uploading a file to the ESE.

The file exchange is done through a secure portal and assures a safe environment for data exchange, with the Department. Access to the ESE file exchange drop box is obtained within the district, through the Directory Administrator. A list of district Directory Administrators and instructions about formatting and uploading files are available online.

If you have further questions about the ELAR drop box, please contact: Sabina Ahmad.

H.4 How can we obtain licensure information for vocational teachers, if they are not in ELAR?

All career technical and vocational education staff are in ELAR. You can use the licensure drop box to get certification information for these educators, just as you would for the rest of your district's educators. If you have any trouble getting licensure information from the licensure drop box, please contact the ESE.
I. DEGREE TYPE, INSTITUTION, AND SUBJECT (SR18–SR26)

I.1 Do I need to collect degree information from all the teachers in my district?

You do not need to collect and report degree information for licensed personnel. These fields exist in the staff roster record for select categories of non-licensed personnel, as indicated in Appendix E of the EPIMS Data Handbook. Personnel whose degree information does not need to be reported in EPIMS should have the appropriate "not applicable" codes entered in the degree fields. No field may be left empty.

I.2 Do we need to provide degree info for those with a waiver or does the degree info come from ELAR?

Anyone with a valid license number in ELAR does not need to provide degree information to EPIMS because it will be available through ELAR. Regardless of whether a teacher is currently teaching under a waiver, if they are certified in any subject, even in an area outside of that subject in which they are currently teaching, they will have a license number, and therefore do not need to provide degree information to EPIMS. If they are teaching under a waiver and have no valid license number, then degree information should be submitted in EPIMS.

I.3 Who does need to provide degree information in EPIMS?

Appendix E of the EPIMS Data Handbook indicates the job classifications for non-licensed personnel who must submit degree information. Submitting the appropriate "not applicable" codes for Degree Type 1, Degree Institution 1, and Degree Subject 1 is only valid for ESE-certified staff and staff not required to report this information, as indicated in Appendix E. During the validation of your district's data, the system will check the License / Certification Number field and the Job Classification field, to determine if degree information should be in the data.

I.4 What if non-licensed personnel have entered their degree information in ELAR, do they need to submit it in EPIMS as well?

Not all non-licensed personnel need to submit degree information. However, if an individual is among the non-licensed personnel who must submit degree information, regardless of whether they have entered this data in ELAR, they must submit it in EPIMS. Without an ELAR license number, EPIMS cannot link to ELAR to retrieve the degree information.
I.5 Can a "not available" code be added as an acceptable value for the degree information fields?
No. This information should be available in district personnel files, if it is not forthcoming from staff through direct requests. It is important information for many job classifications and would have been provided prior to hiring. Allowing a "not available" code would significantly impact data analysis, if abused.

I.6 Three entries for degree information does not seem to be enough. For some individuals, the degree that makes them highly qualified is not their highest degree, or they may need to list more than three in order to show they are highly qualified in more than three areas. Will the ESE consider adding more degree fields to EPIMS?
Educators should choose the degrees that are most relevant to their job classification. Certified personnel will enter their degree information in ELAR, where more fields are available.

I.7 What if the exact degree subject is not available in the degree subject code list?
The degree subject code list is not all-inclusive. The ESE recommends that districts choose a broader degree subject than the one in which the degree is in, before they resort to code 70, the code for "other."

I.8 How do we enter double majors?
If an individual has a double major, it should be entered in two sets of the degree fields. The second set of degree fields will repeat the degree type and degree institution of the first set, but will have a different degree subject code.

I.9 Should individuals with masters in degree subjects that are not listed (for example, education administration, curriculum and instructional technology, etc.) use the "other" code or "education"?
If the degree in which an individual has achieved a degree is not listed, the degree in the closest subject area should be used. For education administration and curriculum and instructional technology, it is preferable to use "education." It is generalizing the actual degree subject, but it is more specific than "other."

I.10 What if the institution where the degree was obtained has since changed names? Do we use the code for the new institution or the other domestic institution code?
Use the code for the new institution.
J. FILE TRANSMISSION

J.1 Can staff roster records and work assignment records be transmitted in the same file?

No.

J.2 Do all staff roster records in a district have to be transmitted in one file or can they be transmitted in multiple files?

Staff roster records must be transmitted in one file. If a district transmits a second file of staff roster records, the file will replace the previously transmitted file.

J.3 What happens if you transmit a file of updated staff roster records to replace an older file but the file does not have the same name as the one transmitted previously?

It does not matter what the name of the file is. Either way, the old staff roster records will be overwritten.

J.4 Do all work assignment records have to be transmitted in one file or can they be transmitted in multiple files?

Work assignment records can be transmitted in multiple files. If multiple files are transmitted, the system will ask whether the new file should replace a file transmitted previously, or be added to the list of transmitted files. Since an individual can have multiple work assignment records, the uniqueness of a work assignment record is determined by the MEPID, Subject Area-Course Code, and Section fields. If a work assignment record is transmitted in a file and these three fields are identical to the same three fields in another work assignment record (transmitted in another file or even the same file), the system will find the duplication during Step Two (the validation step), and identify it as an error.

J.5 What if I have transmitted work assignment records that I want to delete and replace?

If you want to delete an entire file, you can do so in Add/Edit Multiple Records. In the list of transmitted files, there is information about the number of records in a file, and the number of errors in the file. There is also an option to select the file and correct the errors individually, or to delete the entire file and correct the errors in your system, in order to retransmit a new file, once the errors are corrected.
K. EPIMS AND SCHOOL REPORT CARD

K.1 Is the EPIMS data used for the school report card?

The EPIMS data is used to populate the school report card application. Districts do not have to send in a separate data set for the school report card.

L. DATE OF HIRE (SR11)

L.1 Does the Date of Hire data element provide the information that the ESE is looking for? What about interruptions of service, and the movement of individuals through different job classifications?

This data element will report the date of an individual's most recent hire in the district. We realize that this does not capture years of experience in a job classification or account for interruptions in service. While these are known limitations of the data, we believe that this data will prove useful information over time for analyzing trends. We intend to capture years of experience from the planned modifications to the ELAR application.

M. FEDERAL SALARY SOURCE (SR12, SR14, SR16)

M.1 The award notification by ESE of federal grants often does not occur until October or November. The districts will need time to process the awards and distribute the funding before the due date for EPIMS submission. Does the ESE allow enough time?

Although the money has not yet reached the districts by the time the EPIMS collection will begin, districts can anticipate the amounts and should be able to assign the appropriate codes, by the time EPIMS is due in December of that year.

M.2 Which federal grants should be reported in these fields?

Districts should report only those federal grants that are administered by the ESE.
N. JOB CLASSIFICATION & ASSIGNMENT (WA07 & WA08)

N.1 What is the job classification code for ELL program staff?

ELL program staff members are reported with the general population, in their related job classification (WA07), but distinguished in the assignment code (WA08). This is true as well for program staff members in bilingual and Title 1. It is only SPED program staff who are required to be broken out.

N.2 How should we report teacher assistants? A teacher assistant works under the direct supervision of a teacher and does provide instruction to students. They are not part of the teacher contract.

These individuals should be reported under Job Classification code 4100 (paraprofessional) and Assignment code 401–405. If they are not providing instruction, then code 406 should be used.

N.3 How should we report parent liaisons?

Job Classification code 6100 — Administrative Aides.

N.4 How do we code administrators whose offices are in schools?

If the individual is an administrator for the entire district and their office is in a school, their school code (WA06) would reflect a district-level position, and their job classification (WA07) would be in the 1200 series of codes. If the individual is an administrator for a school, he/she would be WA07 = 1305, 1310, or 1320 with a school-level code in WA06. If the administrator is an administrator across multiple schools, but not district-wide, a separate work assignment record is required for each school, with the appropriate school code and FTE, for the time spent administering there.
N.5  **How do we report co-teachers, team teaching or job-sharing assignments in EPIMS?**

There are two EPIMS job classification for co-teaching assignments (job classification 2306 - Classroom Teacher, and 2308 - Virtual Class Teacher). Districts should use these job classifications to report co-teaching assignments by assigning both co-teachers to the same subject-area course, class section and term within a school where both teachers have co-responsibility for assigning one mark to each student taking the class. Validation rules have been created to accept the co-teaching assignments and to ensure that if one co-teacher is identified for a class, at least one other co-teacher must be assigned to the same class. Multiple teachers with job classification 2305 or 2307 will not be accepted with the same subject-area course, class section, and term within a school. Virtual Class and Classroom teachers may not be combined in a single class section.

O. **SUBJECT AREA-COURSE CODES (WA10)**

O.1  **Can districts use their own course codes in EPIMS?**

No. Districts must map their district courses to the numbers in Appendix G: Subject Area-Course, and use the numbers in Appendix G to submit to EPIMS.

O.2  **What if none of the EPIMS course descriptions match what is being taught in the district course?**

The ESE advises districts to choose the course code that best describes the course that is being taught in their district. Few course descriptions will match exactly. In difficult mapping cases, districts can use the "other" course code, within the subject area, or choose one course from among the two or more that would most aptly apply. It is certainly acceptable for a district to make the best possible selection from the course list provided, even if that course's description does not cover completely all that is encompassed, by the course being taught in the district.

O.3  **Are the EPIMS codes for advanced placement courses the same as the SIMS codes?**

Beginning with the October 2010 collections, the 5-digit Advanced Placement codes are reported in EPIMS, the Student Course Collection (SCS), and SIMS.

O.4  **How are virtual classes taught by out-of-district teachers collected in EPIMS?**

At this time, virtual classes taught by out-of-district teachers are not collected in EPIMS, however, course information is collected in SCS.
O.5 How do districts treat online courses in EPIMS taught by in-district teachers, but not necessarily attended by in-district students?

Records for virtual classes taught by in-district teachers and attended by students within the district are collected by both EPIMS and SCS. Records for out-of-district students will not be reported in SCS.

DESE has a need to accurately identify classes taught virtually. The easiest way to do this without altering our file structure was to create job classifications which identify teachers of virtual classes:

- 2307 – Job classification for a solo teacher of a virtual (online) class.
- 2308 – Job classification for a co-teacher of a virtual (online) class.

Virtual classes are reported in EPIMS using a virtual job classification in WA07 and the school code where the teacher is located in WA06. A school which is virtual only, that is, which provides no courses taught in traditional “brick & mortar” classrooms may not report any teachers using codes 2305 or 2306.

The all-courses code (99999) will no longer be accepted for virtual courses.

As is the case with all other classes, teachers and students in virtual classes are cross-validated between EPIMS and SCS to link students and teachers at the classroom level for courses taught and attended within the district or at virtual schools.

O.6 If a district provides "enrichment" classes, or similar sessions, where chess, jewelry-making, film criticism, etc. can occur but are not "taught" by a specific teacher (although teachers do staff the room), then should these enrichment sessions be reported in EPIMS?

No, do not report these sessions in EPIMS. These sessions are similar to study halls in that staff are not assigned to teach an academic or vocational subject, for which credit is earned.

O.7 How should classes containing multiple levels be reported?

In circumstances in which students within the same classroom, taking the same subject-area course are doing different coursework (for example, some take honors, while the majority take general coursework), the SCS data element “Course Level,” should be used to distinguish between the coursework being taken within the classroom by individual students. A single work assignment record should be reported, rather than multiple work assignment records, which would result from changing either the course or the section, and reporting these classrooms separately.
P. CLASS SECTION (WA11)

P.1 What is the purpose of the "class section" data element?

Class section codes are intended to differentiate subject area-courses taught from identical subject area-courses, taught within a school during the same term. How the codes for class section are constructed is up to each district. They can be the room number in which the class is taught, or as simple as A, B, C. They do not need to incorporate the subject area-course code in their makeup. At a K-8 school, the class sections would distinguish the multiple first grade classes from each other, and at the upper grades, would distinguish the multiple English classes taught from each other.

Here are some examples:

If Mrs. Jones teaches two courses of English to 9th graders at the H.S. in the first quarter, the subject area-course code would be 01001, and the grade would be 9. Her two work assignment records could be:

WA10 = 01001 (Subject Area-Course)  
WA11 = A (Class Section)  
WA16 = 41 (Term)

and

WA10 = 01001  
WA11 = B

WA16 = 41 (Term) If Mr. Smith also has a 9th grade English class at the H.S., his work assignment record needs to have a separate class section code:

WA10 = 01001  
WA11 = C

WA16 = 41 (Term) The combination of Subject Area-Course and Class Section and Term (WA16) must be unique within a school.
P.2 How should we report class sections for teachers who teach multiple sections of the same course, such as teachers who teach physical education? Could the section numbers for these classes be the same for each? For example, could they all be "PE"?

EPIMS requires the reporting of separate work assignment records, for all courses, each with a unique combination of subject area-course, class section and term codes, within a school. In the example above, each class section of physical education taught in a term within a school must be reported in a separate work assignment record, with a unique class section code.

P.3 Can a class’s section change mid-year?

Some SIS’s incorporate a teacher’s name in the class section code. When a teacher for a particular class changes midyear, the section code for the class changes although the students and room do not. The disadvantage of this is that when the section number changes, it will be difficult to connect the original teacher with the students in the class. If possible, please retain class section codes year-round.

Q TERM AND TERM STATUS

Q.1 What value will we use to report term in EPIMS, for non-instructional staff?

The correct term value for non-instructional staff is “01”—full year.

Q.2 What are the “X” Course Term codes (TRIX, QTRX, MINIX, etc.), and how should they be used?

The “X” Course Term codes are used to identify courses that cover multiple terms, but are not full-year courses. For example, a course that spans two trimesters would be reported as 34 – TRIX. For more information on the Course Term data element, please refer to the EPIMS Data Handbook.

Q.3 What are the “N” Course Term codes (TRIN, QTRN, MININ, etc.), and how should they be used?

The “N” Course Term codes are used to identify courses that cover multiple non-consecutive terms. For example, a course that meets during the 1st and 3rd quarters would be reported as 46 – QTRN. For more information on the Course Term data element, please refer to the EPIMS Data Handbook.
R. ASSIGNING FTES (WA12)

R.1 In many districts, the high school’s scheduling is divided into semesters or trimesters, and the FTE for a high school teacher is spread out across the whole year. Scheduling in the first semester represents .5 FTE for that teacher, with the second semester’s schedule being added in for that teacher’s complete FTE of 1.0. Would this teacher’s FTE be represented as .5 in EPIMS, for the October 1st collection?

No. The FTE associated with work assignments should total 1.0 for an individual's full time assignments for the active term(s) at the time of collection, in this case, on October 1. Therefore, even though schools will change class assignments at mid-year, the districts should report all individual FTEs on the October 1 work schedule, on the basis of 1.0 = full time (not as .5). For the teacher described above, if he or she is employed as a full-time teacher and teaching two classes requiring an equal amount of the instructor’s time on October 1, each class being taught would represent .5 FTE for a total of 1.0 for the EPIMS collection.

R.2 If a 1.0 FTE teacher teaches 5 courses and 1 section in each course requiring an equal amount of the instructor’s time during the active term(s) at the time of the data collection, would the FTE by course section equal 0.2?

Yes. Each would constitute a unique combination of course and section, so each would constitute an FTE of .2.

R.3 What if a teacher teaches one section of two courses during the active term requiring an equal amount of the instructor’s time, due to enrollment issues?

Each would constitute a unique combination of course and section, so if these classes were the only classes this teacher taught during the active term at the time of the data collection, each class assignment would have an FTE of 5.

R.4 Should FTE be determined by the number of periods taught?

No. We are not using the term "period" because we are not interested in the reporting of free periods, or class preparation periods, or other time slots, when an educator is not in the classroom actively engaged in the teaching or in supporting the teaching of students.
R.5  Should FTE be calculated by sections taught?

The ESE requires the reporting of each unique combination of course section and term taught or supported within a school. Districts should determine FTE on the basis of each unique combination of course and section taught or supported, for the active term(s) at the time of the data collection. For clarification on reporting this data element, please review the questions in Class Section.

S. HIGHLY QUALIFIED TEACHER (HQT) STATUS (WA14) AND SUBJECT MATTER COMPETENCY (SMC) (WA15)

For more specific HQT and SMC questions than are addressed here, please contact HQTHelp@doe.mass.edu.

S.1  How do charter schools report highly qualified teacher information?

Charter schools should refer to the technical advisory, issued by the Commissioner in April 2007, to ensure that they are reporting highly qualified teacher information accurately.

S.2  Do administrators need to be highly qualified?

No. Most of the job classifications reported by districts will have the "not applicable" code (00) in WA14. Whenever WA14 is 00, WA15 (Subject Matter Competency) should be 00 as well.
S.3 Which job classifications require highly qualified information?

Only six job classifications (WA07) require highly qualified information. These are teachers (2305 & 2307), co-teachers (2306 & 2308), teachers who support content instruction (2310), and long-term substitute teachers (2325). However, these job classifications do not always require HQ information. Only teachers of core academic subjects, indicated by the assignment codes (WA08=001-011, 016, or 029), are required to be HQ and only these teachers should have a 01 or 02 in WA14.

The following code combinations are acceptable when a core academic subject is indicated in WA10 (subject area–course code):

WA07 = 2305, 2306, 2307, 2308 or 2325
WA08 = 001–004, 007–011, 016, or 029
WA14 = 01 or 02
WA15 = SMC code required and will depend on whether the individual is teaching at the non-secondary or secondary level.

WA07 = 2310
WA08 = 005 or 006
WA14 = 01 or 02
WA15 = 00 (see question S3)

S.4 Is subject matter competency (WA15) data required for everyone for whom highly qualified (WA14) data is required?

No. Special education teachers acting in a consultative role and teaching students with mild/moderate to severe disabilities are considered highly qualified, by holding a valid Massachusetts special education educator license. These individuals do not need to prove subject matter competency. Therefore, the following code combinations are acceptable when a core academic subject is indicated in WA10 (subject area–course code):

WA07 = 2310
WA08 = 005 or 006
WA14 = 01 or 02
WA15 = 00
S.5 Does a teacher of a core academic subject need to hold the appropriate license, in order to meet the highly qualified (WA14) requirement?

The federal NCLB requirement for highly qualified teacher status requires teachers of the core academic subjects to possess either a Preliminary, Initial, or Professional license, but it does not specify that the license be in the area(s) being taught. This policy was in conflict with the state licensure requirements that guide district employment decisions and that require teachers to possess the appropriate license(s) for their role(s), in order to be legally employable. Therefore, in an effort to align the federal highly qualified requirements, and the state's licensure policies, effective July 1, 2007, teachers teaching the core academic subjects must hold the appropriate valid MA teaching license for the subject area(s), in which they are teaching for greater than 20% of their teaching schedule, in order to satisfy both the state's licensure requirements, and the federal NCLB's highly qualified teacher (HQT) provision. Individuals, who have met the HQT requirements prior to this change, will retain their HQT status.

To reiterate, as of July 1, 2007, to be designated as highly qualified, a teacher of a core academic subject must hold the appropriate Massachusetts teacher license for the subject in which he or she is teaching for more than 20% of his or her schedule.

S.6 If a teacher of a core academic subject is assigned a class outside of the subject area in which he or she is licensed, and this activity counts for less than 20% of his or her teaching schedule, does he or she still need to be highly qualified?

Yes. All teachers teaching core academic subjects must be highly qualified and demonstrate subject-matter competency in the subject area, regardless of the time spent teaching that subject. The only distinction made, based on time spent teaching core academic subjects, is that the teaching license an individual holds must be in the subject area taught by that person 80% of his or her teaching schedule. For core academic subjects taught 20% or less of an individual's schedule, the license they hold does not have to be in this core subject. In both situations, subject matter competency must be demonstrated, as required.

In other words, licensed individuals can teach outside of their licensed area up to 20% of their teaching schedule and still be considered highly qualified to teach in that area. It is the demonstration of subject-matter competency in the non-licensed area that determines whether or not the individual is highly qualified to teach it, but it is not dependent on the completion of a ESE license in that area.
S.7 How do I code paraprofessionals in WA14 and WA15?

WA14 (Highly Qualified Status) and WA15 (Subject-Matter Competency) only apply to teachers of core academic subjects indicated by the assignment codes (WA08 = 001–011, 016, 017, and 019).

For more specific HQT and SMC questions than are addressed here, please contact HQTHelp@doe.mass.edu.

T. MIDDLE SCHOOLS

T.1 What subject area-course codes should middle schools use?

The NCES has published a set of prior-to-secondary course codes which have been adopted in the EPIMS and SCS systems beginning in October 2011. Many of the new prior-to-secondary course codes have a grade designation included as part of the course description. For example, the subject-area course code for Grade 7 mathematics is 52037; the subject-area course code for Grade 8 mathematics is 52038. Grade 7 and Grade 8 specific subject-area course codes should be used for all applicable middle school classes.

U. CAREER/VOCATIONAL TECHNICAL EDUCATION (CVTE)

U.1 How should we report CVTE aides in EPIMS?

CVTE aides should be reported under the paraprofessional job classification (WA07 = 4100), and the CVTE paraprofessional assignment (WA08 = 403). If they are in a Title I school with a school-wide program, they need to meet the paraprofessional qualifications. If they are CVTE paraprofessionals at a non-Title I school, or a Title I school with a Targeted Assistance Program, they do not need to meet the paraprofessional qualifications.
V. MISCELLANEOUS QUESTIONS

V.1 How do we handle a student mentoring program, where a teacher has a student who helps in the classroom? The teacher is assigned but not actually teaching, so how do we classify in all the categories: job class, highly qualified, etc.?

The teacher should be reported as the instructor for this class, regardless of whether they are actually instructing all the students. Since it is not a core academic class, the assignment code should be for other academic instructional staff (212), which is for teachers of non-core subjects. Since this course is not considered one of the core academic subjects, highly qualified information is not required for this work assignment record and should not be entered, although the teacher may be highly qualified in another subject.