san diego county office of EDUCATION
FUTURE WITHOUT BOUNDARIES

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Tips & Tricks for a Clean Audit

Thursday, February 15, 2024

Casey Choate, Manager, Credentials & Live Scan Services
Monica Robinson, Credential Analyst

Types of Assignment Monitoring

SB435 Assignment Monitoring Review (Paper Based)

SDCOE – monitoring authority is mandated to conduct year-round statutory monitoring, which requires **all certificated educators** be properly assigned. (Including hourly employees and nonteaching certificated assignments)

- Adult Education
- Child Development/Preschool
- Librarian Services

CA Statewide Assignment Accountability System (CalSAAS)

- Annual Monitoring of **all certificated educator assignments**
- Monitors ***classroom teacher and services assignments*** entered into CALPADS
- CalSAAS will NOT include charter school services assignments, but the chartering authority may request information. EC 44258.9

AMR Data Collection Outside of CalSAAS

Must be submitted to San Diego County Office of Education (SDCOE) – Credentials office annually. Due on or before Friday, March 1, 2024

- ***CORE*** middle school assignments/master schedules (EC 44258.1)
  - Course schedule noting the CORE groupings (such as GROUP A, B, or C OR color-coding CORED periods) and hanging fifth periods. Student count for each group should remain the same.

School Year: 2022/2023
District: *SD Valley District*
Prepared By: LOVE DAY
Date: 3/03/2023

FUNLAND Middle School

Master Schedule
2022/2023

Last Name	First Name	Emp ID#	DOB	Period 0 Assignment	Period 1 Assignment	Period 2 Assignment	Period 3 Assignment	Period 4 Assignment	Period 5 Assignment	Period 6 Assignment	Comments
STARR	LUCKY	xxxxxxx	9/24/1987	Home Room	Math 6 CORE A	Math 6 CORE B	Science 6 CORE A	Science 6 CORE B	Genius Hour	PREP	T5 8005 (b)
HILL	MORGAN	600000	4/7/1993	Home Room	History 6 CORE A	History 6 CORE B	English 6 CORE A	English 6 CORE B	ELD	PREP	Emergency CLAD
PEACOCK	BIRD	400000	1/9/1989	Home Room	English 6 CORE A	English 6 CORE B	History 6 CORE A	History 6 CORE B	ELD	PREP	Emergency CLAD
LANE	LOIS	919191	6/5/1985	Home Room	English 6 CORE A	English 6 CORE B	History 6 CORE A	History 6 CORE B	Genius Hour	PREP	T5 8005 (b)
SMALL	BIGGIE	929293	8/24/1989	Home Room	PREP	Newcomers English Core	Necomers History Core	Newcomers Math Core	Newcomers Science Core	ELD	Self-contained
CLAUSE	SANTA	696969	12/9/1980	Home Room	ELD	Math, Newcomers CORE A	Math, Newcomers CORE B	Science, Newcomers CORE A	Science, Newcomers CORE B	ELD	
HOMBRE	SUPER	123123	10/18/1968	Home Room	PREP	English, 6-8 Newcomers CORE A	English, 6-8 Newcomers CORE B	History, 6-8 Newcomers CORE A	History, 6-8 Newcomers CORE B	ELD	EC 44263
TAMPICO	JUNIOR	303303	4/18/1993	Home Room	Math 6 CORE A	Math 6 CORE B	Science 6 CORE A	Science 6 CORE B	PREP	ELD	
YOU	AWESOME	603060	5/30/1996	Home Room	Science 6 CORE A	Science 6 CORE B	Math 6 CORE B	Math 6 CORE B	Genius Hour	PREP	T5 8005 (b)

SAMPLE of CORE MASTER SCHEDULE

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AMR Data Collection Outside of CalSAAS

Must be submitted to San Diego County Office of Education (SDCOE) – Credentials office annually. Due on or before *Friday, March 1, 2024*

- **ALL local assignment options** (Education Code options)
  - Supporting documentation must be submitted
  - Teacher Consent form(s) required annually

District/Charter Name
Local Assignment Option

School: _____ Date: _____

Teacher Name: _____ PeopleSoft EID#: _____

Approved Subject Area(s):

_____

_____

My signature below confirms that I have consented to the above assignment(s) for the xx/xx school year:

_____
Educator Signature

_____
Date

_____
Authorized District Administrator Signature Title

_____
Print Name Date

T5 §80020.4

a) The holder of a California teaching credential based on a baccalaureate degree and a teacher preparation program, including student teaching or the equivalent, may serve as school-site, school district, and or county staff developer in grades twelve and below, including preschool, and in classes organized primarily for adults.

(b) A teacher serving as the staff developer for a specific subject must hold a credential in the subject or have his or her expertise in the subject verified and approved by the local governing board.
(c) The holder of a California designated subjects adult teaching credential may serve as the school-site, school district, and or county staff developer for adult teaching subject areas.
(d) The holder of a California designated subjects vocational teaching credential may serve as the school-site, school district, and or county staff developer for vocational teaching subject areas.

Title 5 80020.4
Local Employing Agency Must Verify
Base Teaching Credential: Credential based on BA and Student Teaching; Credential in Subject of Staff Development*
Content Verification: Verification of Subject Expertise*
Board Action: Resolution*
Assignment Can Be In
Setting: Staff Development at the school site, school district, or county level
Grade: N/A
Content: Any
* Must have ***either*** a credential in the subject area of the staff development activities or have expertise in the subject area verified and approved by the school board.
Legal Citation for Local Assignment Option: T5 §80020.4

Example: Local Assignment Option Consent Form

- Requires a full teaching credential
- Requires the teacher serving on the LAO to give their consent for the assignment
- For ***general education assignments*** only
- Must be done annually
- May require Board approval action

Common Local Assignment Options (LAOs) for Teaching in California's Public Schools

Education Code (EC) and Title 5 Regulations (T5) provide local employing agencies (LEAs) with teacher assignment options that can be used when an LEA is unable to assign a certificated employee with the appropriate credential. These options, known as Local Assignment Options (LAOs), allow flexibility at the local level and are used solely at the discretion of the LEA. The LEA is responsible for verification of all LAO requirements and should always review the language of the EC or T5.

Note- All Local Assignment Options:

- Require a **full teaching credential** (Intern, Provisional Internship, and Short-Term Staff Permit holders cannot serve on Local Assignment Options);
- Require the teacher serving on the LAO to give their **consent for the assignment**; and
- Are for **general education assignments only**, and cannot be used for special programs such as Special Education, Career Technical Education, or English Learner assignments.

Legal Citation for Local Assignment Option:	*Local Employing Agency Must Verify:*			*Assignment Can Be In:*		
	Base Teaching Credential	Content Verification	Board Action	Setting	Grade	Content
EC §44256(b)	Elementary Credential	12 lower or 6 upper semester units in Content taught	Resolution	Departmentalized	8th and below	Any
EC §44258.2	Secondary Credential	12 lower or 6 upper semester units in Content taught	Resolution	Departmentalized	5th – 8th	Any
EC §44258.3	Credential based on BA and Student Teaching	Subject Knowledge as defined by board	Specific Board Policy*	Departmentalized or Self-Contained	K – 12th	Any
EC §§44258.7(c)(d)	Any Teaching Credential	Special skills and preparation in Elective taught	Specific Board Policy**	Departmentalized	K – 12th	Elective
EC §44263 *(Elementary)*	Any Teaching Credential	60 semester units distributed among 10 Subject Areas	Resolution	Self-Contained	K – 12th	Any
EC §44263 *(Secondary)*	Any Teaching Credential	18 lower or 9 upper semester units in Content taught	Resolution	Departmentalized	K – 12th	Any
EC §44865	Credential based on BA and Student Teaching	None	None	Independent Study; Home/Hospital; Adult Ed; Necessary Small/Continuation/ Alternative/Opportunity/Juvenile Court/ County or District Community Schools	K – 12th	Any
T5 §80005(b)	Credential based on BA and Student Teaching	Knowledge and Skills in Content taught	None	Departmentalized	K – 12th	Elective
T5 §80020.4	Credential based on BA and Student Teaching; Credential in Subject of Staff Development***	Verification of Subject Expertise***	Resolution***	Staff Development at the school site, school district, or county level	N/A	Any
T5 §80020.4.1(a)	Credential based on BA and Student Teaching	None	None	Program Coordination at a school site	N/A	Any

*Craven: Refer to the Advisory on Teacher Assignment Option EC §44258.3 for an example of appropriate board policies and procedures.

**Committee on Assignments (CoA): Use of CoA requires the board to adhere to the procedures outlined in EC §§44258.7(c) and (d).

Must have ***either a credential in the subject area of the staff development activities ***or*** have expertise in the subject area verified and approved by the school board.

AMR Data Collection Outside of CalSAAS

- ***Adult Education, Child Development, and Preschool*** assignments do not have dedicated CALPADS course coding and **will not be captured/monitored in CalSAAS**
- Librarian Services Compliance – to determine who is provided library services. (LEA or another public agency)

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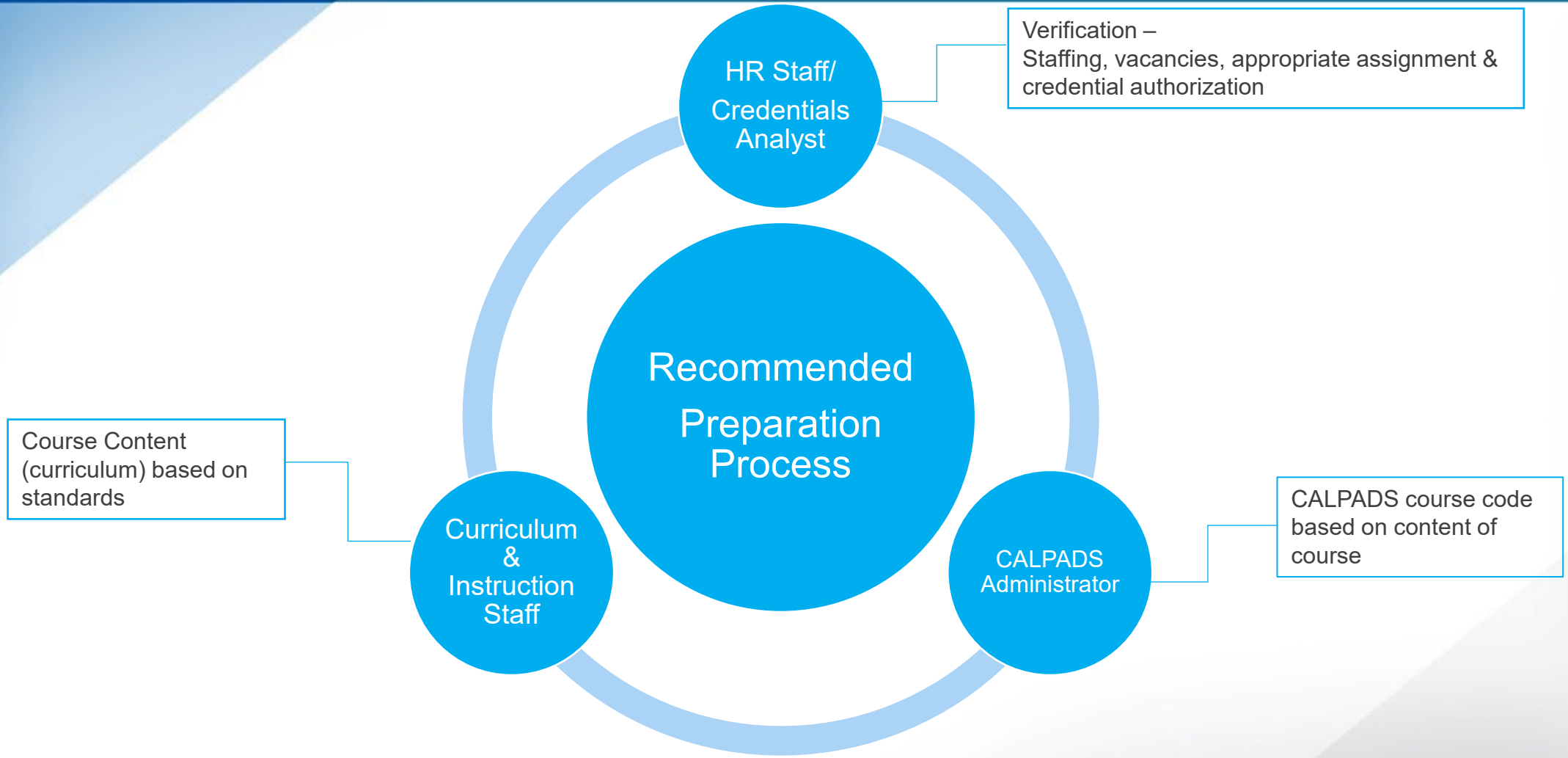
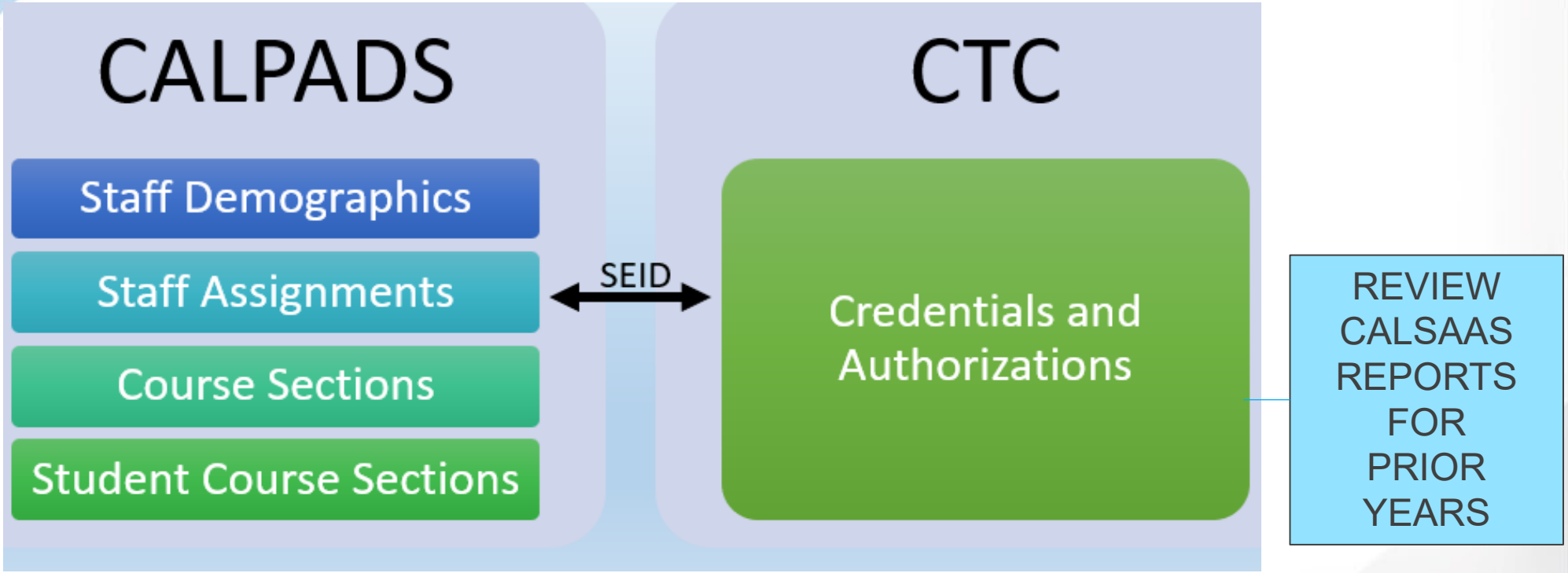
Recommended Preparation for CaISAAS Monitoring


HR Staff/ Credentials Analyst
Verification – Staffing, vacancies, appropriate assignment & credential authorization
Recommended Preparation Process
Course Content (curriculum) based on standards
Curriculum & Instruction Staff
CALPADS Administrator
CALPADS course code based on content of course

Which data should be reviewed?



CalPADS Fall 2 Deadline for 23 -24 school year is Friday, March 1, 2024

Recommended Review Process

- Review CalSAAS Reports for 2022 - 2023

Exception History (2022-2023)

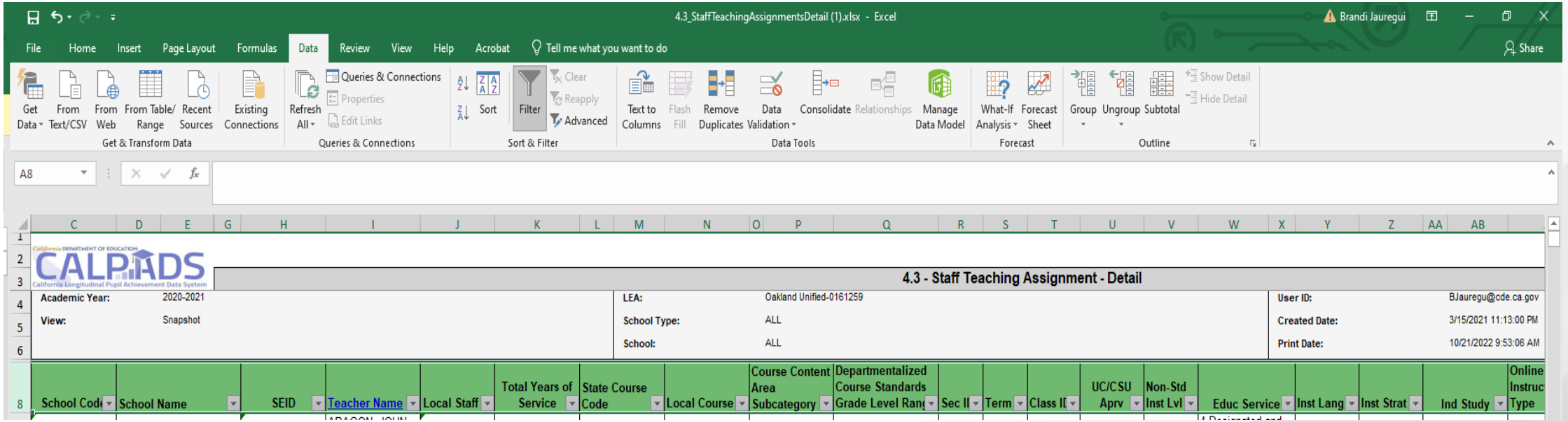
Generated On: 12/6/2023 10:28:41 AM

District	School	SEID	Last Name	First Name	Exception ID	Exception Type	Exception Value	Modified By	Modified Date	Previous Status	New Status	Previous Determination	New Determination	Comment
Best District Ever	PADRES UNIFIED	XXXXXXXXXX	RUTH	BABE	3075536	CALPADS Code	0137	Casey Choate	10/30/2023	MA Completed	Submitted to CTC	None	CALPADS Error	should be coded as 6020
Best District Ever	PADRES UNIFIED	XXXXXXXXXX	RUTH	BABE	3075536	CALPADS Code	0137	CTC Admin	07/05/2023	-	Undetermined	-	None	Exception identified
Best District Ever	PADRES UNIFIED	XXXXXXXXXX	RUTH	BABE	3075536	CALPADS Code	0137	Monica Robinson	09/01/2023	Undetermined	MA Completed	None	CALPADS Error	should be coded as 6020
Best District Ever	PADRES UNIFIED	XXXXXXXXXX	SOSA	SAMMY	3184958	CALPADS Code	0212	Casey Choate	10/30/2023	MA Completed	Submitted to CTC	None	Local Assignment Options: EC §44831	Educator has a C of C and is under EC44831 for speech services
Best District Ever	PADRES UNIFIED	XXXXXXXXXX	SOSA	SAMMY	3184958	CALPADS Code	0212	CTC Admin	07/05/2023	-	Undetermined	-	None	Exception identified
Best District Ever	PADRES UNIFIED	XXXXXXXXXX	SOSA	SAMMY	3184958	CALPADS Code	0212	Monica Robinson	09/01/2023	Undetermined	MA Completed	None	Local Assignment Options: EC §44831	Educator has a C of C and is under EC44831 for speech services
Best District Ever	PADRES UNIFIED	XXXXXXXXXX	MATTHEWS	MARK	3140767	CALPADS Code	0137	Casey Choate	10/30/2023	MA Completed	Submitted to CTC	None	Corrected MA	Obtained Admin after census date.

✓Make changes to 2023-24 CalPADS data based on exceptions

Recommended Review Process

- Review 2023 – 24 CalPADS Reports for accuracy:
  - 4.3 Staff Teaching Assignment Details Data Report



Recommended Review Process

- Review 2023 – 24 CalPADS Reports for accuracy:
  - 4.5 Non-Classroom Based or Support Assignments

CALPADS

4.5 - Staff Non Classroom Based or Support Assignment - Detail

Academic Year:	2020-2021	LEA:	ABC Unified-1964212	User ID:	BJauregu@cde.ca.gov
View:	Snapshot	School Type:	ALL	Created Date:	3/7/2021 11:22:01 PM
		School:	ALL	Print Date:	11/5/2021 10:57:59 AM

School Code	School Name	SEID	Staff Name	Local Staff ID	Job Classification	Staff Job Classification FTE Percentage	Non Classroom Based or Support Assignment
1964212	ABC Unified	8268601807	Abe, Stacia L	40001760	11-Pupil services	100.0	6020-Other Certificated non-instructional assignment
		7907273275	Ancheta, Lani J	40000562	11-Pupil services	100.0	0211-Speech-Language Pathologists
		5500538417	Arredondo, Daniel Barrios	40001978	11-Pupil services	100.0	0400-Counselor
		1826026617	Ayala, Lora A	40002023	12-Teacher	100.0	6020-Other Certificated non-instructional assignment
		6648230115	Bales, Kathleen R	40001075	11-Pupil services	100.0	0206-Nurse
		7553945499	Ballard, Lora Jane	40000327	10-Administrator	100.0	0137-Administrator - Other

Recommended Review Process

School Code	School Name	SEID	Teacher Name	Local Staff ID	Total Years of Service	State Course Code	Local Course ID	Course Content Area Subcategory	Departmentalized Course Standards Grade Level Range	Sec ID	Term	Class ID	UC/CSU Aprv	Non-Std Inst Lvl	Educ Service	Inst Lang	Inst Strat	Ind Study	Online Course Instruction Type	Middle School Core Setting	Local Assignment Option	EL Course Enrollment
1995596	ABC Secondary (Alternative)				34.00	9218-Skills Center/Study Skills/College Readiness	5757-Sks For Success		NOT-Not Applicable	43_1000	FY	43Y_2_1000	N	N/A	4-Designated and Integrated ELD Instruction But Not Primary Language Instruction			Y	1-Instructor-led			Y
					3.00	9218-Skills Center/Study Skills/College Readiness	5757-Sks For Success		NOT-Not Applicable	43_1001	FY	43Y_9_1001	N	N/A	4-Designated and Integrated ELD Instruction But Not Primary Language Instruction			Y	1-Instructor-led			Y
6010862	Aloha Elementary				30.00	9292-Music - Instrumental (Non-Performance Based)	1_6-Brink	MUIN-01: Music - Instrumental - Band	ELM-Elementary K-4	1_6	FY	1_6	N	N/A	4-Designated and Integrated ELD Instruction But Not Primary Language Instruction			N	1-Instructor-led	N		N
					18.00	9231-Special Education Support-Resource Specialist Program (RSP)	1_7-Pelligra		ELM-Elementary K-4	1_7	FY	1_7	N	N/A	4-Designated and Integrated ELD Instruction But Not Primary Language Instruction		Special Education	N	1-Instructor-led	N		N

Recommended Review Process

Student Information Systems (SIS)

- Pull a report of staff course assignments from your local SIS.
  - Correct state course codes or other issued that came up as errors for CalPADS in the prior year
  - Fix CalPADS errors prior to certifying for Fall 2

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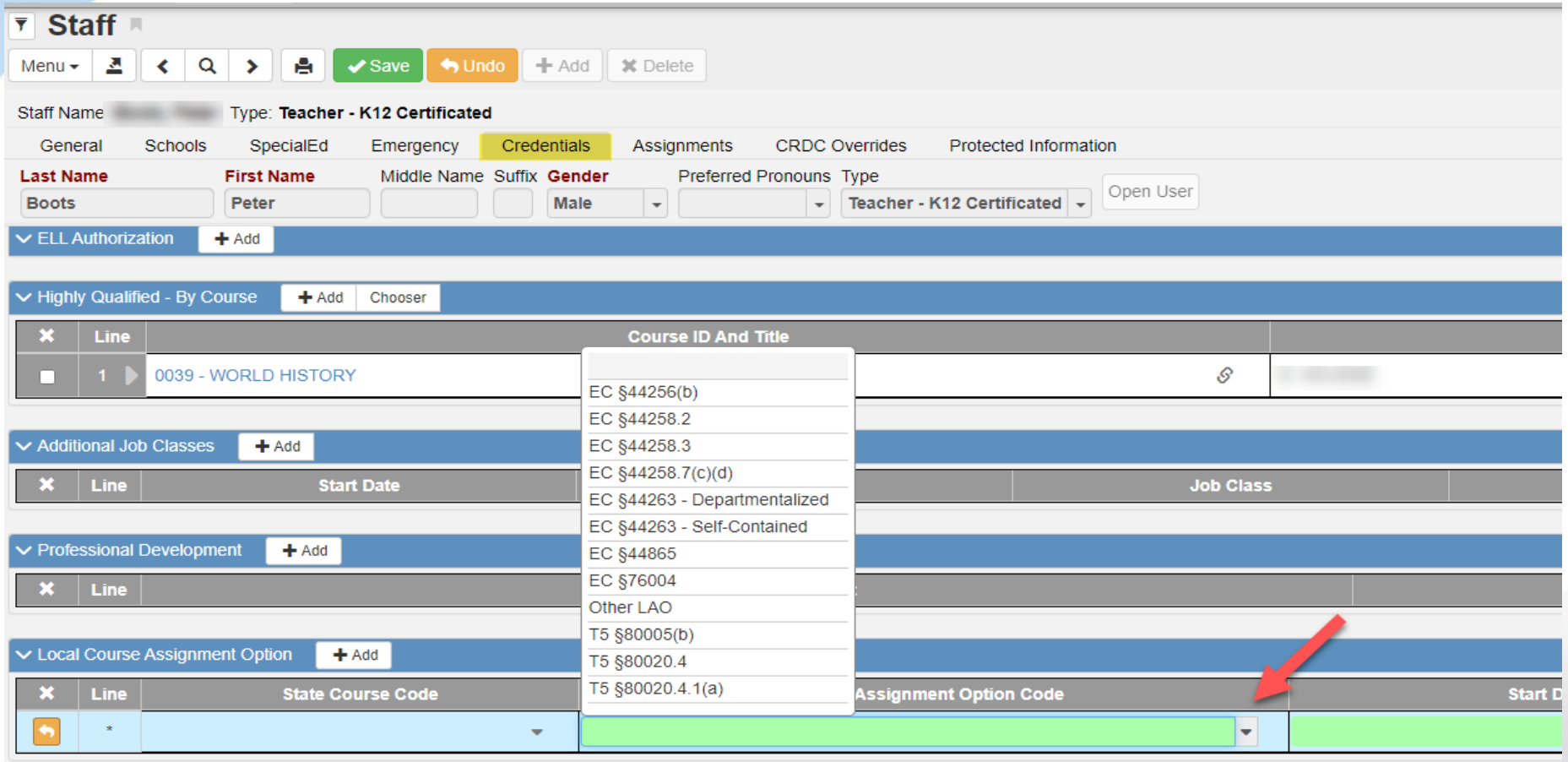
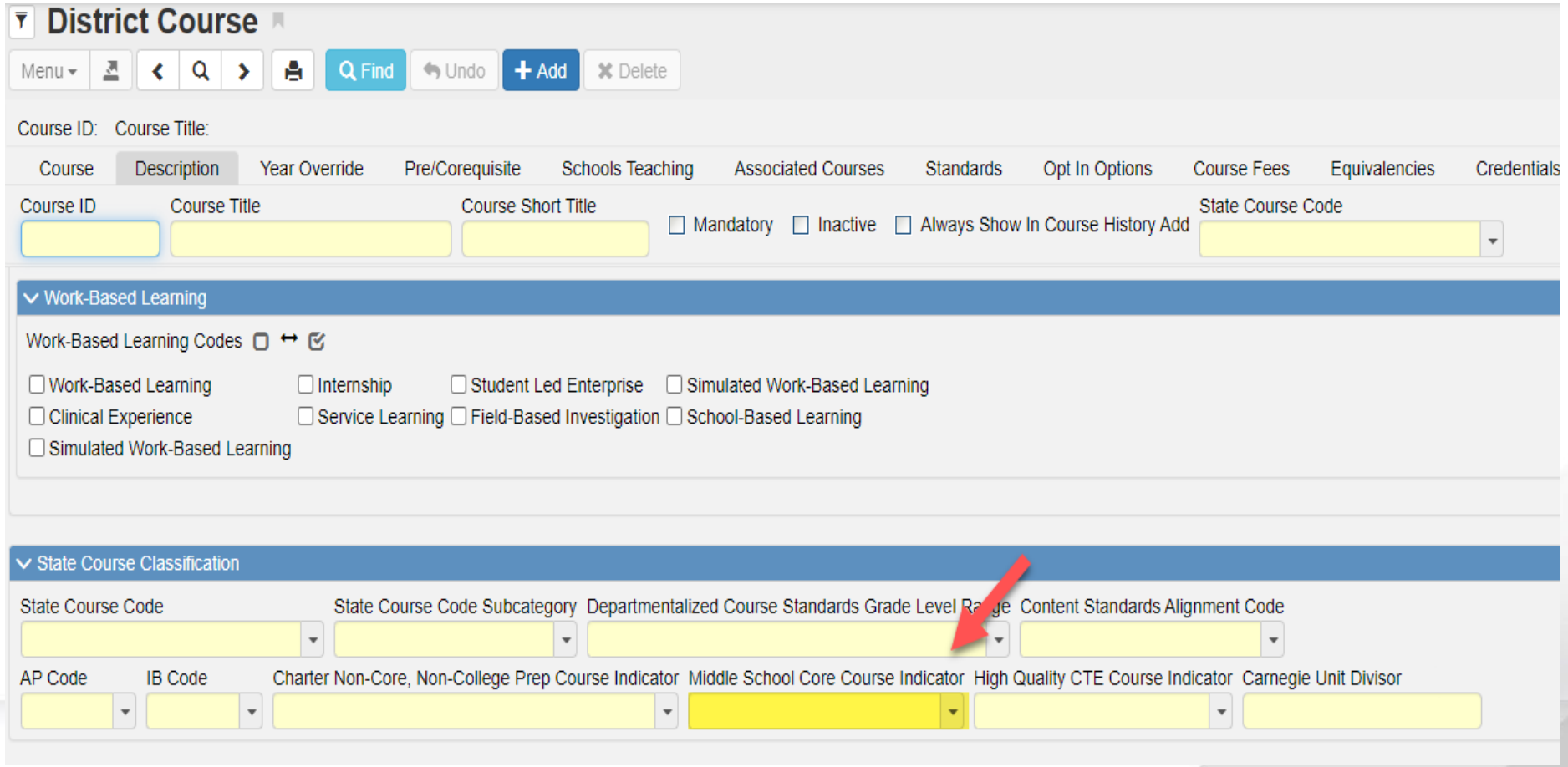
Recommended Review Process



Recommended Review Process



Recommended Review Process

For English Learner Services

Recommended if using PeopleSoft, run a query:

M_CRED_DIST_EL_AUTH - Active creds w EL authorization to see who has full EL authorization vs. the limited ELAE.

- Educators teaching in departmentalized ELD need a full EL (e.g. ELA1, SA12) or Bilingual authorization.
- If educator is **NOT** providing EL services, *code 5 – No English Learner Services* should be selected.
- If educator is providing primary language instruction, educator mush hold a bilingual authorization

Common English Learner Authorizations and the Services They Authorize

Credential	*Authorization Code*	*English Learner Service(s)*			
		Specially Designed Academic Instruction in English (SDAIE)	English Language Development (ELD) within content being taught	Departmentalized English Language Development (ELD)	Bilingual Instruction
Single Subject (All types)	ELA1	✓	✓	✓	X
	ELAS	✓	✓	X	X
	BA**	✓	✓	✓	✓
	R1WL/ELD	✓	✓	✓	X
Multiple Subject (All Types)	ELA1	✓	✓	✓	X
	ELAM	✓	✓	X	X
	BA**	✓	✓	✓	✓
Education Specialist (All Types)	ELA1	✓	✓	✓	X
	ELAE	✓	✓	X	X
	BA**	✓	✓	✓	✓
Designated Subjects: CTE	ELA1	✓	✓	✓[1]	X
	S17C	✓	X	X	X
	BA**	✓	✓	✓	✓
Language Development Specialist[5]	S22/S-22	✓	✓	✓	X
CLAD Certificate	ELA1	✓	✓	✓[1]	X
CCSD Certificate	S17D	✓	✓[2]	X	X
	S17S	X	✓[3]	X	X
	S17A	✓	X	X	X
SB 1969 Certificate[4]	NONE	✓	✓[3]	X	X
Bilingual Documents (Specialist, BCC, and BCLAD)[5]	R-3/R3B	✓	✓	✓	✓
	S6/S-6				
	S14				

A "✓" indicates that the service is authorized. An "X" indicates that the service is not authorized.

**references the two letter code for the specific language authorized by the bilingual authorization. See the document's authorization statement for more information.

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English Learner (EL) Authorization

Document	Integrated ELD	Designated ELD ***AND*** Integrated and Designated ELD	Departmentalized ELD (***CALPADS Course 9104***)	Bilingual Instruction
full English Learner Authorization (or CLAD Emphasis) Authorization Codes: **ELA1, SA12**	✓	✓	✓	
Multiple Subject, Single Subject, or Education Specialist Credential with revised ELA Authorization Codes: **ELAM, ELAS, or ELAE**	✓	✓		
Bilingual Authorization Authorization Codes: **BA****	✓	✓	✓	✓2
Certificate of Completion of Staff Development Authorization Code: **Various**	✓	✓1		

1. Authorizations may vary based on auth code or certificate - review educator auth or certificate
2. Bilingual authorization will be checked against language of delivery. If languages do not match, an exception will generate

Friendly Reminders for a Clean Audit

- Vacancies – check to see if *TRUE* vacancies
- Special Education assignments – are they being coded with ***Instructional Strategy Code of 700-Special Education***
- Push-in/Pull Out Special Ed Teachers – **9231** Resource specialist
- Independent Study – Report 4.3 – must indicate Independent Study Indicator column for "Y" and make sure it is populated with 44865
- CTE courses review (course codes **7000-8999**)

Monitoring Tools/Resources

- **CTC Credential Information Guide (CIG)**

  Assignment School Training Modules under Assignment Resources

https://www.ctc.ca.gov/credentials/cig2/assignment-resources/assignment-school

Training modules available:

- Assignments in Charter Schools
- English Learner Services

Monitoring Tools/Resources

- CALPADS Code Sets - https://www.cde.ca.gov/ds/sp/cl/systemdocs.asp
- CALPADS listserv - https://www.cde.ca.gov/ds/sp/cl/listservs.asp
- CALPADS FAQs - https://www.cde.ca.gov/ds/sp/cl/calpadsfaqs.asp
- TAMO Reports - https://www.cde.ca.gov/ds/ad/tamoinfo.asp
- PEAT - https://www.cde.ca.gov/pd/ee/peat.asp
- CTC Appropriate Credentials - Appropriate Credentials for CALPADS Course Codes
- Admin assignment manual - https://www.ctc.ca.gov/docs/default-source/credentials/manuals-handbooks/administrator-assignment-manual.pdf
- CTC listserv - CTC News Email List (ca.gov)
- Assignment News - Subscribe to Assignment Monitoring News
- Credential FAQs - https://www.ctc.ca.gov/credentials/faq/faq-general

CalSAAS Report vs Teacher Assignment Monitoring Outcomes (TAMO)

CalSAAS Determinations

- Based on whether educator is LEGALLY ASSIGNED
- Based on state statute
- Reported on CTC website for public
- Reports available in CalSAAS system for users

Teacher Assignment Monitoring Outcomes

- Based on ESSA federal categories
- Definitions of categories approved by State Board of Education
- Posted on CDE website for public

CDE DATA REPORTING OFFICE
Email: dro@cde.ca.gov/Phone # 916-327-0219

QUESTIONS, COMMENTS OR TOPICS

Thank you for attending!