

Creating a Needs List in EMAT

Instructional Materials Division

Texas Education Agency

September 2017



- What is a needs list and why should I create one?
- How do I create a list for state-adopted instructional materials needs?
- How do I create a list for non-adopted instructional materials needs?
- How do I view needs lists in EMAT?
- What happens next?



Many districts and charter schools were affected by Hurricane Harvey. Those districts can now make submissions in EMAT to let others know what instructional materials they need. The resulting Needs List will be published in EMAT and on the TEA website to inform anyone wanting to donate materials to districts in need.

The purpose of this process is to connect those wanting to help with districts in need. Think of it as an instructional materials gift registry!



To start your needs list, click *Needs List Start Page* on your district's start page.

*Select a School Year District/Charter

District Allotment Information

IMA & TEKS Certification form was received on 4/3/2017.

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

Instructional Materials Allotment Usage for School Year 2017-2018

Remaining Allotment: \$2,803,604.89 Available Allotment: \$2,803,604.89

EMAT

- [EMAT Inventory Browser](#)
- [Reports](#)
- [Allotment Disbursement](#)
- [Report Lost/Damaged/Destroyed](#)
- [IMA & TEKS Certification Form 2017-2018](#)
- [Needs List Start Page](#)

AIM

- [AIM Enrollment](#)
- [AIM Inventory Browser](#)
- [Reports](#)
- [Report Lost/Damaged/Destroyed](#)
- [Receive AIM Vendor Shipments](#)

[Show Announcements](#) Hide Complete Requisitions

EMAT Requisition List Find | | 1-3 of 3

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

AIM Requisition List Find | | 1-10 of 10

Requisition ID	Last Updated	Requisition Type	
NEXT		AIM - Annual Requisition - Audio - LD	Create New Requisition
NEXT		AIM - Annual Requisition - Audio - VI	Create New Requisition
NEXT		AIM - Annual Requisition - Digital Mats	Create New Requisition



That will take you to the *Needs List Start Page*.

Needs List Start Page

Needs List Contact Person

Name

Email ID

Phone

State-Adopted Needs List Transaction

Select the *State-Adopted Needs List Transaction* to start or add to your list of needs for state-adopted instructional materials that can be found in EMAT. This includes state-adopted packages or components of state-adopted packages. Instructions for creating a needs list can be found at [\[insert link\]](#).

View Submitted Needs Transactions

Select *View Submitted Needs Transactions* to view your district's needs list. This link will only appear if your district has submitted at least one needs list transaction. This link is also used to remove materials from your district's needs list.

Non-Adopted Needs List Transaction

Select *Non-Adopted Needs List Transaction* to create a list of needs for products not available in EMAT. These are items that districts would normally request funds for through an allotment disbursement request.

Fulfill a Need

Potential donors will select *Fulfill a Need* to view lists submitted by all districts in need. This link will be used to select the instructional materials you wish to provide for a district in need. After you select items on the *Fulfill a Need* link, an email will be generated to connect districts needing materials with those wanting to help and to inform TEA of the potential partnership. The fulfilling entity and the district in need will work together from there to hopefully fulfill the need. Instructions for fulfilling a need can be found at [\[insert link\]](#).



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Select *State-Adopted Needs List Transaction* to start or add to your list of needs for state-adopted instructional materials.

Select *Non-Adopted Needs List Transaction* to create a list of needs for products not available in EMAT.

Select *View Submitted Needs Transactions* to view your district's needs list. This link will only appear if your district has submitted at least one needs list transaction.

Select *Fulfill a Need* to view lists submitted by other districts.



District contact information will populate after the district has submitted its first needs list transaction.

This contact information will be sent to anyone wanting to fulfill a need for your district. This may include districts, private companies, charitable organizations, or private citizens.



State-Adopted Needs List



Use the *State-Adopted Needs List Transaction* when adding items that can be purchased in EMAT. This includes entire state-adopted packages and single components of state-adopted packages.



To begin or add to your state-adopted needs list, select a qualifying condition from the drop-down menu.

County District	Region	5
Business Unit 7B910	District Type Independent School District	Status Active

State-Adopted Needs List

School Year 2017-2018

[Return to Needs List Start Page](#)

Report ID R00	Type State Adopted Needs List
Item Type EMAT	Qualifying Condition <input type="text"/>



Then follow the steps and read the information on this and the next several slides.

1. Select the grade level from the drop-down menu.
2. Click the magnifying glass to select the MLC.
3. Click the magnifying glass to select the ISBN.



The screenshot shows a search form with four columns: *Grade Level, *MLC, Subject, and *ISBN. The *Grade Level column contains a dropdown menu with '1st Grade' selected. The *MLC and *ISBN columns each contain a search input field with a magnifying glass icon. Three red arrows labeled 1, 2, and 3 point to the *Grade Level dropdown, the *MLC search field, and the *ISBN search field, respectively.

	*Grade Level	*MLC	Subject	*ISBN
1	1st Grade			



4. Leave the *All Components* checkbox checked if you need all the components in the package.
5. The *Title/Description* field will populate based on the package ISBN selected.
6. Click the item details icon to view details of the package ISBN selected.



	Title / Description	All Components?
		<input checked="" type="checkbox"/>



7. If you need only one component of a package, uncheck the *All Components* checkbox.
8. Click the magnifying glass to select the component.
9. The *Component Title* field will populate based on the component ISBN selected.



All Components?	Component ISBN	Component Title
<input type="checkbox"/>	<input type="text"/> 	



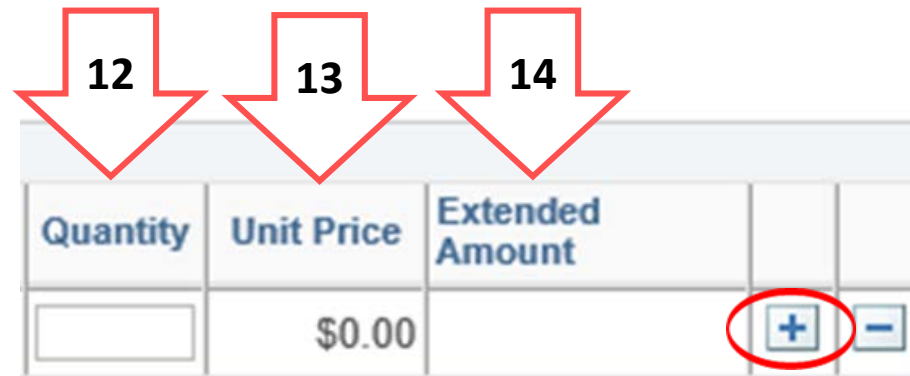
10. The *Publisher/Vendor* field will populate based on the ISBN selected.
11. The *Inventory Quantity* field will populate based on your district's EMAT inventory. (Only materials purchased through a requisition will appear on your EMAT inventory.)



Publisher / Vendor	Inventory Quantity



12. Enter the quantity needed.
13. The unit price will populate based on the material selected.
14. The extended amount will calculate the quantity times the unit price.
15. Click the (+) sign to add another row.



Quantity	Unit Price	Extended Amount		
<input type="text"/>	\$0.00		<input type="button" value="+"/>	<input type="button" value="-"/>



16. Click *Submit* prior to leaving a transaction session to have the materials published to your needs list.

You can add items to your submitted list at any time.

County District	Region	5
Business Unit 7B910	District Type Independent School District	Status Active

State-Adopted Needs List

School Year 2017-2018

[Return to Needs List Start Page](#)

Report ID R00	Type State-Adopted Needs List
Item Type EMAT	Qualifying Condition <input type="text"/>



Transaction Date-Time

	*Grade Lvl	*MLC	Subject	*ISBN	Title / Description	All Components?
1	1st Grade <input type="text"/>	<input type="text"/>		<input type="text"/>		<input checked="" type="checkbox"/>



17. Click *Return to Needs List Start Page* to return to the previous page.

County District	Region	5
Business Unit 7B910	District Type Independent School District	Status Active

State-Adopted Needs List

School Year 2017-2018

[Return to Needs List Start Page](#)

Report ID R00	Type State-Adopted Needs List
Item Type EMAT	Qualifying Condition <input type="text"/>

Submit

Transaction Date-Time

	*Grade Lvl	*MLC	Subject	*ISBN	Title / Description	All Components?
1	1st Grade <input type="text"/>	<input type="text"/>		<input type="text"/>		<input checked="" type="checkbox"/>



Non-Adopted Needs List



Use the *Non-Adopted Needs List Transaction* when adding items that cannot be purchased in EMAT. These are items that districts would normally request funds for through an allotment disbursement request.

Similar to disbursement requests, this option will have free-type fields to provide information on the materials you need.



To begin, select a qualifying condition from the drop-down menu.

County District	Region 5	
Business Unit 7B910	District Type Independent School District	Status Active

Non-Adopted Needs List

School Year 2017-2018

[Return to Needs List Start Page](#)

Report ID R00	Type Non-Adopted Needs List
Item Type EMAT	Qualifying Condition <input type="text"/>



Then fill in the required information about the material you need.

- **Grade Level**—A range can be used for materials that cover multiple grade levels (e.g., K–5)
- **Multiple List Code (MLC)**—If the material is for a course that does not have an MLC, please leave this field blank.

Grade Level	MLC



- Subject—Enter a specific course name or subject area (e.g., Algebra I).
- ISBN—Enter the ISBN without hyphens. Use N/A if the material does not have an ISBN.

Subject	ISBN



- Title/Description—Enter the specific title of the material needed.
- Publisher/Vendor—Enter the publisher or vendor name.

Title / Description	Publisher / Vendor



- Quantity—Enter the quantity needed.
- Unit Price—Enter the unit price.
- Extended Amount—The extended amount will populate based on the quantity and unit price entered.

Quantity	Unit Price	Extended Amount		
<input type="text"/>	\$0.00		<input data-bbox="1337 921 1388 949" type="button" value="+"/>	<input data-bbox="1414 921 1465 949" type="button" value="-"/>



Then follow the steps on this and the following slide:

1. Click the (+) sign to add another row.
2. Click **Submit** prior to leaving a transaction session to have the materials published to your needs list.

You can add items to your submitted list at any time.

County District	Region	5
Business Unit 78910	District Type	Independent School District
	Status	Active

Non-Adopted Needs List

School Year 2017-2018

[Return to Needs List Start Page](#)

Report ID	R00	Type	Non-Adopted Needs List
Item Type	EMAT	Qualifying Condition	<input type="text"/>



Transaction Date-Time										
	Grade Level	MLC	Subject	ISBN	Title / Description	Publisher / Vendor	Quantity	Unit Price	Extended Amount	
1								\$0.00		<input type="button" value="+"/> <input type="button" value="-"/>



- Click *Return to Needs List Start Page* to return to the previous page.

County District	Region	5
Business Unit 7B910	District Type Independent School District	Status Active

Non-Adopted Needs List

School Year 2017-2018

[Return to Needs List Start Page](#)

Report ID R00	Type Non-Adopted Needs List
Item Type EMAT	Qualifying Condition <input type="text"/>

Submit

Transaction Date-Time

	Grade Level	MLC	Subject	ISBN	Title / Description
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



View Needs Lists



The *View Submitted Needs List* is used to view items on your district's list. This link will only appear if your district has a submitted at least one needs list transaction.

This link is also used to remove materials from your district's needs list.



Click *Download* to download your district's list to an Excel spreadsheet.

Component Description	Required Quantity	Price	Publisher / Vendor
	75	29.65	Studies Weekly, Inc.
Big Ideas Math Algebra 2 Texas Edition	23	82.00	Big Ideas Learning, LLC



Use the *Fulfill Status* field to remove an item from your needs list.

1. Select a reason from the drop-down menu next to the item that is no longer needed.

Dropdown menu options:

- Fulfilled
- No longer needed

	Fulfill Status	School Year	Grade	MLC	Subject
1	<input type="text" value=""/>	2017-2018	5th Grade	5320	Social Studies, Grade 5
2	<input type="text" value=""/>	2017-2018	High School - Math	9152	Algebra II

Submit

Return



2. Click *Submit* and the item will be removed from the published needs list.
3. Click *Return* to go back to the previous page.

	Fulfill Status	School Year	Grade	MLC	Subject
1	<input type="text" value=""/>	2017-2018	5th Grade	5320	Social Studies, Grade 5
2	<input type="text" value=""/>	2017-2018	High School - Math	9152	Algebra II



What's Next?



Districts that want to fulfill a need can click on the *Fulfill a Need* link in EMAT.

Potential donors without EMAT access can contact the Instructional Materials Division (IMD) at instructional.materials@tea.texas.gov. IMD staff will enter the information in EMAT for those without access.



Clicking *Fulfill a Need* will generate an email to connect districts needing materials with those wanting to help and to inform TEA of the potential partnership. The fulfilling entity and the district in need will then work together to hopefully fulfill the need.



Once the need is fulfilled, please remove the material from your list using the *Fulfill Status* field on the *View Submitted Needs List* link.

IMD staff will adjust EMAT inventories for districts as needed for fulfilled state-adopted materials. Non-adopted materials are not part of district inventories in EMAT.





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