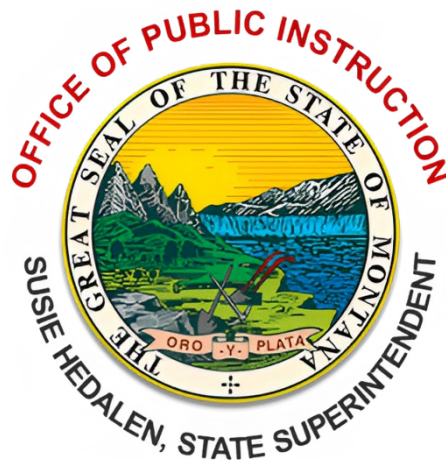


Montana

Office of Public Instruction

MontCAS Policies and Procedures for Participation in Statewide Assessments



Effective September 2024

The OPI Assessment Unit supports teaching and learning in Montana's public and accredited non-public schools through the Montana Comprehensive Assessment System (MontCAS), which includes a suite of required statewide assessments aligned to Montana's academic content standards. Data literacy and its direct influence in guiding instruction, alongside a balanced approach including the use of formative and interim strategies ensures all students have fair and equitable opportunities to obtain a high-quality education and reach, at a minimum, proficiency on challenging academic content standards. The "MontCAS Policies and Procedures for Participation in Statewide Assessments" guidance describes the policies and procedures required to participate in statewide assessments in the state of Montana. These requirements fall under the authority of both state and federal laws and regulations which are defined further throughout this manual

Contents

Purpose	4
Which Schools are Required to Test?	4
What Programs Rely on Achievement Data?	5
Required Statewide Assessments	6
Montana Aligned to Standard Through-Year (MAST) Assessment	6
DLM Alternate ELA/Math Assessment (DLM ELA/math)	6
ACT with Writing (ACT)	6
Montana Science Assessment (MSA)	7
DLM Alternate Science Assessment (DLM Science)	7
WIDA ACCESS and Alternate ACCESS	7
National Assessment of Educational Progress (NAEP)	8
Policies and Procedures for Participation	9
Student Testing Expectations	9
How is Student Eligibility to Test Determined?	10
Civil Rights Obligations	10
Participation to the Fullest Extent	10
Needs-Based Selection of Test Settings	11
Including Students with Disabilities	11
Including English Learners	12
Students Recently Arriving to the United States	12
Special Circumstances	12
Montana Medical Exemption Policy	13
What Qualifies in Montana as a Medical Exemption?	14
General Medical Exemption Guidelines	14
What level of documentation is required for a medical exemption?	14
Standard Medical Reasons and Examples	14
Reporting Medical Exemptions	15
Off Grade Testing	16
Retesting and Double Testing	16
Statewide Assessment Test Registration Process	17
EDUCATE (IC)/TDS Student Data Upload FAQs	18
Statewide Assessment Participation Rate Calculation	19

MAST Through-Year Participation Calculation.....	19
DLM ELA, Math, and Science Participation Calculation.....	20
Summative Assessment Model Participation Calculation.....	20
References	20
Appendices	22

Purpose

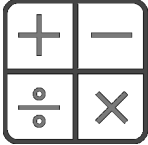
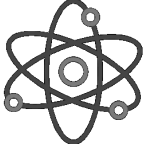
The landmark Elementary and Secondary Education Act (ESEA) of 1965 was reauthorized as the Every Student Succeeds Act (ESSA) in December 2015. ESSA requires that all children have a fair, equal, and significant opportunity to obtain a high-quality education and reach, at a minimum, proficiency on challenging academic content standards. A key purpose of ESEA-ESSA is to promote educational excellence and equity so that all students graduate high school with college and workforce readiness. Further requirements for administering statewide assessments in Montana can be found under the Montana Code Annotated (MCA) and the Administrative Rules of Montana (ARM). ESEA-ESSA requires that Montana must assess students in the content areas of reading/language arts, mathematics, and science. Montana must also annually assess the English language proficiency (ELP) of identified English Learners and participate in the biennial grade 4 and 8 reading and mathematics assessments under the National Assessment of Educational Progress (NAEP). Statewide assessments serve as the primary means through which Montana and its local schools and districts measure and report student achievement and growth.

Which Schools are Required to Test?

Administering the annual state standardized assessments is required under [federal](#) and [state law](#). The Montana Board of Public Education (Board) recognizes that the primary purpose of assessment is to serve learning. (ARM 10.56.101).

In Montana, under the authority of §20-2-121(11) MCA and ARM 10.56.101, the Board adopts rules for statewide assessments in the public schools and those private schools seeking accreditation. The Superintendent of Public Instruction has general supervision of school districts and supports compliance with the student assessment rules through implementation of policies and technical assistance (§20-3-106, MCA). Under the Chapter 56 assessment rules, schools may only administer statewide assessments approved by the Board, and each school district must annually administer statewide assessments to all students in accordance with state and federal laws and regulations that meet the following specifications:

Table 1. The Board's Content Area and Grade Expectations

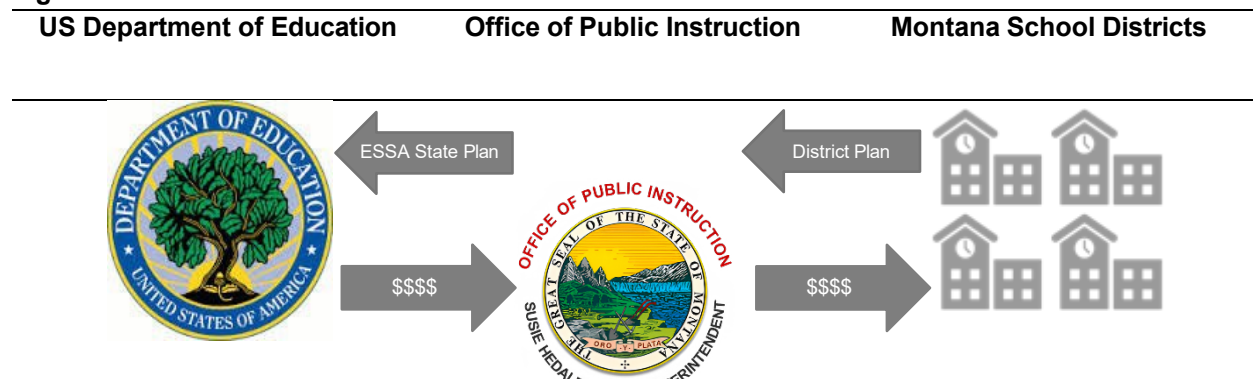
Content Area	English Language Arts (ELA)	Mathematics	Science	English Language Proficiency (ELP)
				
Adopted Standards	10.53.401-413	10.53.501-517	10.53.801-810	10.53.301-311
Tested Grades	3-8 & 11	3-8 & 11	5, 8, 11	K-12

What Programs Rely on Achievement Data?

In 2017, the U.S. Department of Education (Department) released a template for the consolidated state plan under ESEA-ESSA Section 8302. The purpose of the consolidated state plan is to provide parents with quality, transparent information about how Montana will meet all ESEA-ESSA requirements for each federal program. Below is a graphic illustration to show the exchange of information from the Department, to the OPI, then to local education agencies (i.e., school districts) regarding Montana's implementation of the consolidated state plan. Montana submitted to the Department the [ESSA State Plan](#) which was approved in 2018 in order to receive state allocations. Montana's [ESSA State Plan](#) sets the expectations for school districts regarding the implementation of the testing, accountability, and reporting provisions under ESEA-ESSA.

In accordance with these expectations, each school district submits a district integrated strategic action plan (ARM 10.55.601) or other school improvement plans and submits assurances through the [E-Grant Application](#) for the OPI to allocate funds. Statewide assessments have various stakeholders, data users, and numerous grants and other programs that rely on student participation in state tests. In some instances, the data from these assessments are used to make school determinations and/or allocate funding, such as Accreditation, Special Education, or Perkins Grants. Federal formula grants, such as Title I, Part A, require that school districts participate in the annual statewide assessments to receive funding.

Figure 1. State and Federal Consolidated State Plan Information Flow



Because Montana is a “local control” state, school district trustees must adopt policies to implement or administer the testing requirements in accordance with the assessment rules and state accreditation rules (see §20-3-323 MCA). In this respect, the OPI has selected the following six statewide assessments through the state procurement process to fulfill these state and federal grade/subject testing requirements (§18-4, MCA).

Required Statewide Assessments

Student participation in statewide assessments is predominately funded through the federal grant for state assessments (i.e., Title I Part B) and partially funded by the federal IDEA funding. Under the assessment rules, the obligation for funding statewide assessments is the responsibility of the state (see [ARM 10.56.101](#)).

Montana Aligned to Standard Through-Year (MAST) Assessment

The Montana Aligned to Standards Through-year (MAST) assessment is used to determine student proficiency in Grades 3-8 on Montana's Content Standards in ELA and mathematics. The test is administered online in three distinct testing windows throughout the school year. It is important that registration information within EDUCATE (IC) be as accurate and complete as possible for the inclusion of all eligible students for this important statewide accountability assessment. Student performance within Montana's accountability system will use the results from this assessment for K-8 schools to calculate academic achievement and growth. For more information on this statewide assessment, visit the [MAST FAQ page](#).

DLM Alternate ELA/Math Assessment (DLM ELA/math)

The DLM Alternate ELA/Math Assessment (DLM ELA/math) is designed to assess students with significant cognitive disabilities and measure academic content that is aligned to Montana's Content Standards in ELA and mathematics. The DLM ELA/math is the alternate version provided in place of the MAST assessment and the ACT with Writing for Students with Significant Cognitive Disabilities (SwSCD). This assessment contains built-in supports that allow students to use materials they are most familiar with and communicate what they know and can do as independently as possible. The assessment is computer based with multiple options for student interaction. This assessment is administered in two testing windows annually, a Fall Window and a Spring Window. It is important that registration information within EDUCATE (IC) be as accurate and complete as possible for the appropriate identification of students eligible for the alternate assessment. Students eligible for the alternate assessment will be included within Montana's accountability system for K-8 and high schools. For more information on this state selected assessment, visit the [DLM ELA/math FAQ page](#).

ACT with Writing (ACT)

The ACT with Writing assesses the content areas of English, writing, reading, science, and mathematics. This assessment is given to all Grade 11 students as the statewide accountability assessment for mathematics, ELA, and science. The test is administered online and with ACT allowable accommodations. The ACT with Writing has three 2-week windows starting in March. It is important that registration information within EDUCATE (IC) be as accurate and complete as possible for the inclusion of all eligible students for this important statewide accountability assessment. Student performance within Montana's accountability system will use results from this assessment for schools with Grades 9-12 to calculate academic achievement. For more information on this state selected assessment, visit the [ACT FAQ page](#).

Montana Science Assessment (MSA)

The Montana Science Assessment (MSA) is aligned to the Montana Content Standards in science (2016). The MSA is an online adaptive test administered to Grades 5 and 8. It has a twelve-week test window that starts in March. It is important that registration information within EDUCATE (IC) be as accurate and complete as possible for the inclusion of all eligible students for this important statewide accountability assessment. Student performance within Montana's accountability system will use results from this assessment for K–8 schools to calculate the Science Technology Engineering Mathematics (STEM) indicator. For more information on this state selected assessment, visit the [MSA FAQ page](#).

DLM Alternate Science Assessment (DLM Science)

The DLM Alternate Science Assessment (DLM Science) is designed to assess Students with Significant Cognitive Disabilities (SwSCD) and measures academic content that is aligned to Montana's Content Standards in science (2016). The DLM Science is the alternate version provided in place of the MSA and the science portion of the ACT with Writing. This assessment contains many built-in supports that allow students to use materials they are most familiar with and communicate what they know and can do as independently as possible. The assessment is computer based with multiple options for student interaction. This assessment has a fifteen-week test window that starts in February. It is important that registration information within EDUCATE (IC) be as accurate and complete as possible for the appropriate identification of students eligible for the alternate assessment. Student performance within Montana's accountability system will use results from this assessment for K–12 schools to calculate the STEM indicator. For more information on this state selected assessment, visit the [DLM Science FAQ page](#).

WIDA ACCESS and Alternate ACCESS

Federal law requires 100 percent of English Learners to participate in the WIDA ACCESS assessment for development of English language proficiency. The WIDA ACCESS is a large-scale English language proficiency assessment aligned to the WIDA English language development standards (2020). Subtests include the domains of listening, speaking, writing, and reading. The WIDA ACCESS is given annually to monitor English Learner progress in acquiring academic English in Kindergarten through Grade 12. There is an alternate version, Alternate ACCESS, for students who are English Learners and have significant cognitive disabilities. It is important that registration information within EDUCATE (IC) be as accurate and complete as possible for the appropriate identification of students eligible for this assessment. Montana's accountability system uses results from this assessment for all schools with ten or more English Learners to calculate the "ESSA EL Progress". To be considered proficient in English, students must, at a minimum, reach a 4.7 overall composite score on the WIDA ACCESS assessment. Students with Significant Cognitive Disabilities (SwSCD) testing on the Alternate ACCESS must reach, at a minimum, a proficiency level of P2 (see [English Learner Guidance for School Districts](#)). For more information on this state selected assessment, visit the [WIDA ACCESS FAQ page](#).

National Assessment of Educational Progress (NAEP)

NAEP, better known as "Nation's Report Card," is the only national perspective on American education. NAEP is a congressionally mandated project overseen by the National Center for Education Statistics (NCES) to monitor knowledge, skill, and performance of the nation's children and youth over time. NAEP measures and reports on a regular basis what America's students know and can do in core subjects like reading, mathematics, writing, and science. From 1969 through 2002, participation in NAEP was voluntary. As of the 2003 administration, participation in mathematics and reading at grades 4 and 8 became a requirement in all states and school districts receiving Title I funding. With over a decade of trend in these grades/subjects, the biennial NAEP state-level administration is a vital data collection for Montana, and it helps inform policymakers of what Montana students know and can do in these various subjects/grades. For more information on this national assessment, visit the [NAEP FAQ Page](#).

Policies and Procedures for Participation

All students, including students with disabilities and English Learners, are required by state and federal law to take part in the statewide assessments with or without accommodations. Generally, if a student can receive instruction, they are also able to participate in statewide assessments; however, the health and well-being of students should take priority in determining whether they can safely participate. All students enrolled in accredited schools are expected to take part in statewide assessments in one of three ways:

1. Participate in the general education assessments without accommodations.
2. Participate in the general education assessments with accommodations.
3. Participate in alternate assessments when the [participation criteria](#) are met.

Students may only be exempted from testing under certain, limited conditions. In these rare and unique instances, a student may be unable to participate in any part of the assessment due to a significant and documented medical reason. In these cases, the school is not penalized for that student's absence due to the documented significant medical emergency. Therefore, when determining the percentage of students taking an assessment, the OPI does not have to include a student with a significant medical emergency in the participation rate calculation for accountability purposes. Non-participation for any other reason will negatively impact the participation rate calculation.

In Montana, there is no “opt out” law, and state law requires all students in public and accredited non-public schools to participate in state testing. In accordance with ESEA-ESSA Section 1112(e)(1)(B)(ii), parents may refuse to have their child participate in statewide assessments; however, under Montana’s compulsory school attendance laws this refusal reason does not exist (see §20-5-103, MCA). Schools must administer statewide assessments with or without accommodations based on individual student needs consistent with all state and federal laws and regulations (ARM 10.56.104). Procedures to notify families and manage participation reasons for students whose families refuse should be determined at the local level (see ARM 10.56.102(6) and [MontCAS Parent Corner Page](#)).

Student Testing Expectations

Both state and federal law require all students in accredited schools to participate in state testing. The school districts must annually assess all students, and in instances of special circumstances, student participation may not fall below 95 percent for all students or 95 percent for student subgroups (consisting of 10 or more students) in the required content areas (i.e., mathematics, reading/language arts, and science assessments) (see ESEA-ESSA Section 1111(c)(4)(E)). Montana must also adhere to the 1.0 percent student cap for the total student population identified as eligible to participate in the alternate assessment(s) (see ESEA-ESSA Section 1111(b)(2)(D)).

The state factors the requirement for 95 percent student participation in mathematics and reading/language arts assessments into the statewide accountability system. Students who meet participation requirements and who do not test are excluded in number of students proficient for calculating the academic achievement indicator and designated as a non-participant for accountability

purposes (see [ESSA State Plan](#) and [Six Things Stakeholders Should Know about Participation and Testing in Montana](#)).

How is Student Eligibility to Test Determined?

Montana's procedures for determining which students are eligible to test uses the current fiscal year school records that begin on July 1 and end on June 30 of each year (see §20-1-301 MCA). The OPI expects all students enrolled in accredited schools with "primary" educational service type records in the State Student Information System (i.e., Achievement in Montana (EDUCATE (IC))) to test. Only student records in EDUCATE (IC) for primary enrolled students are provided to the OPI's test delivery contractors.

The accountability and statewide assessment participation expectations are set from several OPI determined collections published in the OPI's [EDUCATE \(IC\)](#). Any student with a primary enrollment during the OPI's [Published Test Windows](#) are expected to participate in the state statewide assessments. If the student is enrolled in an accredited school in EDUCATE (IC) with a primary enrollment and also included in MAEFAIRS for purposes of determining the Average Number Belonging (ANB), then the OPI expects the student to participate in statewide assessments. For more details on the school district's obligations for state testing, accountability, and reporting, read the OPI's [ESSA State Plan](#). For an overview of content areas and tests that meet each requirement see the [Published Test Windows](#).

Civil Rights Obligations

Schools are obligated to ensure equal access to educational services and programs including inclusion in a safe environment free from discrimination. Every child has the right to an education and must be afforded the same educational opportunities as their peers (§20-9-309, MCA). The law protects individuals from discrimination or harassment based on the following nine protected classes: sex, race, age, disability, color, creed, national origin, religion, or genetic information. Schools must take affirmative steps to ensure all students can meaningfully participate in the provided educational programs and services; therefore, Montana school districts and the OPI must work in partnership to ensure that all students are afforded the opportunity to participate in statewide assessments. This joint responsibility is important to ensure all children have a fair, equal, and significant opportunity to obtain a high-quality education and reach, at a minimum, proficiency on challenging academic content standards. It is never allowable to exclude students based on expected performance, difficulty in administering the test, disability, or English Learner status.

Participation to the Fullest Extent

MontCAS policies and procedures are designed to ensure student inclusion to the fullest extent possible and to provide clear and consistent information on the program-specific test registration processes. The OPI conducts desk and site monitoring to ensure that standardized test administration procedures are implemented with fidelity across school districts which includes ensuring appropriate assessments, with or without accommodations, are selected for all students with disabilities and for English Learners. In addition to the ESEA-ESSA participation requirements there are extensive laws, regulations, and policies

to support the meaningful participation and inclusion of special population students in statewide assessments, the OPI has specific guidelines for school districts to follow in order to equitably serve students with disabilities and English Learners with their participation in statewide assessments.

Needs-Based Selection of Test Settings

The selection of accessibility tools (i.e., universal tools, designated supports, and accommodations) or test settings is a systematic, data-based process made by educators familiar with individual student needs. For students being served with English Learner plans, IEPs, or 504 plans, supports should be discussed at planning meetings. The supports and accommodations that are provided on statewide assessments must be familiar to the student and match those that are provided during classroom instruction and assessments throughout the school year. A student's parents/guardians should be knowledgeable about the supports and accommodations planned for their student to ensure parents/guardians are aware of the conditions under which their child will participate in the assessment. Each vendor-owned Test Delivery System (TDS) collects the test settings so every child can meaningfully participate in statewide assessments.

Including Students with Disabilities

In general, all school-aged children who are students with disabilities as defined by Section 504 and the Individuals with Disabilities Education Act (IDEA) are entitled to free appropriate public education (FAPE) which includes the opportunity to participate in state testing regardless of the educational setting ([ARM 10.16.3121](#)). Decisions about how to assess students with disabilities must be made by a student's Individualized Education Program (IEP) Team under IDEA, the placement team under Section 504, or the individual or team designated by a district to make that decision under Title II of the Americans with Disabilities Act (ADA), as applicable, based on each student's individual needs ([ARM 10.56.104](#)).

The passage of IDEA prompted the creation of a range of test participation options making it possible for students with even the most significant disabilities to be assessed on a test aligned with general education content standards. Each student who receives special education services must have a written IEP that documents how the student will participate in statewide assessments. As described in the assessment rules, statewide assessments must be administered with or without accommodations based on individual student needs. In addition, IEP teams for a student shall determine if the student meets the eligibility criteria for the statewide alternate assessment based on the alternate academic achievement standards (AA-AAAS). The decision to move a special education student to an alternate assessment has significant implications for the path that a student will take in their K–12 school career. It means the student is not able to participate in the general education curriculum even when provided with accommodations. A student who participates in an alternate assessment requires a modified curriculum (see the [Eligibility Guidelines for MontCAS Alternate Assessments](#) document).

In Montana, EDUCATE (IC) collects test settings which describe the testing needs for students with IEPs using an individualized, needs-based approach to select accommodations and supports for statewide assessments. For both IEP and Section 504 students these student accommodations and supports need to be identified and entered into each applicable TDS prior to assessment administration.

Including English Learners

In addition to the ESEA-ESSA participation requirements, English Learners must be served under the Civil Rights Act of 1964 (Title VI) and the Equal Educational Opportunities Act of 1974 (EEOA). English Learners are school-aged children whose English proficiency, or lack thereof, affects their ability to achieve academic excellence and to equally participate in academic programs like mathematics, reading/language arts, science, and social studies. Under federal law, all school districts are required to identify students who are eligible for language assistance. School districts must use the [English Learner Guidance for School Districts](#) to identify English Learners and annually monitor individual progress in acquiring academic English consistent with all state and federal laws and regulations ([ARM 10.56.104](#)).

Decisions about how to assess English Learners should be made by an educator or team designated by a district who is familiar with the student's needs, as well as those supports that the student has been using during instruction and for other assessments to make test setting decisions ([ARM 10.56.104](#)). Supports need to be identified prior to assessment administration. For additional information on student eligibility and identification for English Learners, see the [Eligibility and Identification Criteria for English Learners](#).

Students Recently Arriving to the United States

English Learners are only exempted from reading/language arts portions of the challenging academic content subject assessments if the child is enrolled within a U.S. school for less than 12 months. Those students are exempt from participating in ELA assessments during that initial 12-month period (MAST, DLM ELA, or ACT). English Learners must take the mathematics and science assessments regardless of when they entered the U.S. Do not submit a medical exemption for these students.

Special Circumstances

There are special circumstances and educational situations that do not fall under the typical accredited school and primary enrollment criteria for student registration within the online test delivery systems. The rules for hours of pupil instruction per school year come from §20-9-311, MCA, and the rules for minimum aggregate hours stem from §20-1-301, MCA.

Special Circumstance	Test Registration and Participation Explanation
Homebound	Student is enrolled in a public school system and receives special education and related services in the student's home or other designated setting such as a hospital because the IEP team determined homebound is the most appropriate placement based on the student's individual health and/or academic needs. (Note: Student is entitled to all provisions of IDEA. Public school systems shall ensure FAPE is provided in the Least Restrictive Environment (LRE) and procedural safeguards are implemented.)
Homeschool	Student is NOT enrolled in a public-school system or accredited non-public school because the parent opted not to enroll them and will instead deliver all instruction at home in accordance with state homeschool guidelines. (Note: generally, the child may not participate in statewide assessments given the test management procedures as outlined above in the General Guideline for Student Participation.)
Part Time Students	May participate if enrolled at least quarter time (180 or more hours) (§20-9-311, MCA).
Digital Academy	Participate if enrolled at least quarter time (§20-9-311, MCA).
Residential Treatment Centers	Participate in statewide assessments pursuant to §20-2-121(11), MCA in the tested grades under the letter of agreement with the OPI.

Montana Youth Challenge Academy (MYCA) and Job Corps	Students enrolled at MYCA participate if they are enrolled at least quarter time in the accredited parent school as Grade 11 students. These students are registered under a separate ACT Organization Code on file with ACT as the offsite location has arranged for an ACT-approved test site. Early in the school year, the OPI works with MYCA to provide a list of students registered as Grade 11 students to make them eligible to test in the approved ACT test site. (Note: for state accountability and reporting purposes, these students will be reported to the school that holds their primary enrollment).
Private Accredited School Students	Must participate in statewide assessments for accreditation purposes but are not included for accountability.
Foreign Exchange Students	Participate if the student is enrolled in EDUCATE (IC) and included into MAEFAIRS for purposes of determining the Average Number Belonging (ANB) but are not included for accountability.
Offsite Learning Centers	There are several schools in Montana that are considered “offsite classrooms” as opposed to “schools” based on Montana’s accreditation rules. For the purposes of statewide assessments, typically these campuses are registered to the test delivery systems under the accredited parent school and are managed locally thereafter. Some assessments, like NAEP, may handle these instances differently based on the location and geographic differences of the location. (Note: for state accountability and reporting purposes, these students will be reported to the school that holds their primary enrollment.)
Alternative Schools	Montana has several alternative high schools where students are registered and managed separately based on the ACT with Writing options for test administration and proctoring. Early in the school year, alternative high schools work with the OPI to declare the preference for testing at that location and for managing score reports separately from the accredited parent school. The OPI conducts a separate registration on behalf of these select schools who have already been approved by the ACT as separate ACT test sites. (Note: for state accountability and reporting purposes, these students will be reported to the school that holds their primary enrollment.)

Note: both offsite learning centers and alternative schools under the accreditation rules are considered offsite instructional settings. Definition §20-1-101, MCA: “Offsite instructional setting” means an instructional setting at a location, separate from a main school site, where a school district provides for the delivery of instruction to a student who is enrolled in the district.

Montana Medical Exemption Policy

In 2004, the Department granted states flexibility in participation rate calculations for the purpose of determinations under the ESEA-ESSA accountability process (see ESEA-ESSA Section 1111(c)(4)(E)). The participation rate must be calculated separately for each subject (i.e., reading/language arts, mathematics, and science). The OPI has selected test windows wide enough that if a student misses an assessment, the student will likely have the opportunity to “make-up” the test on a different date within the window. This test “make-up” would count positively towards the school’s participation rate. When a student cannot participate in required assessments at any time throughout the published test windows they are counted as a non-participant unless the reason is due to a significant medical emergency (e.g., a student is hospitalized due to an accident). Students with short-term or minor illnesses, or injuries should participate in statewide assessments.

Students may receive a medical exemption if they cannot participate in a statewide assessment during the testing window (including make-up dates) due to a significant qualifying medical event. System Test Coordinators must record the medical reasons a student did not take the statewide assessment for any child who was enrolled in the school during the [Published Test Window](#) before each test window deadline (see [MontCAS Collection Schedule](#)) for each missed testing window of each academic year. Anything not considered a medical exemption will be reported as non-participation for both state and federal accountability purposes.

What Qualifies in Montana as a Medical Exemption?

Each year, students with serious and chronic medical, or other conditions, can and do participate successfully in statewide assessments. However, there are rare and unique situations in which a student is unable to participate in statewide assessments due to a documented, significant, and incapacitating condition or an emergency that extends across the entire (or remaining) test window. In these instances, school districts may request an exemption from testing the student. Federal regulations allow exceptions to participation in such situations; however, these exceptions must be made with the utmost care and restraint.

General Medical Exemption Guidelines

If the student can participate in learning activities and education, either in their school, home, or outplacement facility, then he/she is able to participate in statewide assessments. The decision to test or not test a student should never depend solely on the outcome of the exemption request, nor is it allowable to exclude students based on expected performance, difficulty in administering the test, disability, or English Learner status. It is incumbent upon the requesting district to provide the OPI with enough compelling evidence to warrant each medical exemption request and justify the non-participation reported status.

What level of documentation is required for a medical exemption?

School district trustees must determine what policies will be adopted to implement these medical exemption testing procedures under the participation assessment rules. The medical exemption should be documented by a student's medical provider. The OPI has provided a sample form for use to document the medical reasons at the provider and family level. School districts are encouraged to retain the medical reason documentation locally for a period of three years as the OPI reserves the right to audit districts to ensure compliance with the requirement to retain signed copies of all applicable forms for up to three years.

Standard Medical Reasons and Examples

Examples of a significant medical emergency include a serious car accident, hospitalization, severe trauma, mental health crisis that is dangerous to self or others, or placement in hospice care. Generally, if the student can receive instruction during the testing window, the student should be able to participate in assessment. An injured student can often participate in a statewide assessment with supports and/or accommodations.

To apply for a medical exemption, districts must gather documentation that the student meets two criteria:

1. The student's situation is so severe that the child cannot participate in any learning or educational activities in any setting (e.g., home, school, or outplacement facility); and
2. The student cannot participate in any tests, even with adjustments (e.g., accommodations or supports) that could allow them to participate.

Table 2. Medical Exemption Definitions

Minor Illness or Injury	Students with short-term minor illnesses or injuries should participate in statewide assessments.
Medically Fragile – Students with IEPs	IEP Teams document how the student will participate in statewide assessments. All medically fragile students are expected to participate in statewide assessments unless a significant and documented medical emergency exists in addition to medical fragility.
Serious Illness	Montana defines a serious illness as one that prevents the student from receiving instruction and participating in assessment for the entirety of the testing window.
Medical Emergency	Montana defines a medical emergency as an incident involving a medical condition, injury, or crisis requiring hospitalization, clinical care, or treatment in response to the incident. Typically, a medical emergency prevents the student from receiving instruction and from participating in assessment for the remainder of the testing window. Medical emergencies should be documented in writing by a licensed medical provider and kept on file by the local district.
Concussion	Due to the specialized care concussions require, even with accommodations or supports, the student may not be able to participate fully in instruction or in statewide assessments. Because of the nature of concussions and how important it is to care for a concussion correctly, this injury is the exception to the rules outlined. The exemption request process must be followed.

Conditions that may not qualify for exemption:

- Short-term illnesses or minor injuries, such as broken arms.
- Certain mental health conditions that permit students to receive instruction.
- Pregnancy.

Reporting Medical Exemptions

Each reason for non-participation (due to medical reasons) is handled by the OPI on a case-by-case basis. Subsequently, the examples provided within this manual are not illustrative of an exhaustive list of all the possible situations or scenarios and are intended as guidance to inform school districts of examples that may or may not be considered as a medical exemption (see **Table 3**). Non-participation decisions must be determined in consultation with the student, family, medical provider (where appropriate), and the school district before they can be reported to the OPI in the [MontCAS Application](#). As such, the medical exemption process is considered a local decision. School districts are encouraged to use the OPI's sample forms and appendices to establish local parameters for what constitutes sufficient evidence for an exemption. The OPI reserves the right to handle these non-participation reports on an individualized basis and will use the [MontCAS Application](#) exemption reason to determine whether or not the situation reported qualifies for an OPI-approved medical exemption (see [MontCAS User Guide](#)).

To report medical exemptions to the OPI, the school district should make sure it has first conducted a consultation and has the necessary documentation to be prepared to submit a reason as shown in **Table 2**. All medical exemptions require a reason (or explanation). To support school districts with this process, the OPI has prepared [Appendix A](#) as a sample form that can be used with the school district to consult the medical professional and [Appendix B](#) as a sample form which can be used with the school district to consult the family. After consultation, the district reports the reason (or explanation for non-participation)

Last Updated August 2025

to the OPI within the [MontCAS Application](#) for each statewide assessment and testing window that the child is unable to participate in due to medical reasons. The OPI has prepared [Appendix C](#) to illustrate the reporting steps within the [MontCAS Application](#) and process. See **Table 3** for additional guidance on how to prepare a reason (or explanation). Each reason should include information to support Parts 1–3. Explanations should be brief (under 500 characters) and should not contain any personally identifiable student information or sensitive information that would violate FERPA or HIPAA (see [Student Privacy on FERPA](#)).

Table 3. Relevant Parts of a Medical Reason Explanation

Relevant Parts	Suggested Information to Clarify Reasons to the OPI
Part 1) Medical Exemption =	Clear in the explanation that the reason relates to documented illness or injuries and/or treatment or prevention.
Part 2) Consultation =	It is evident that reason was determined through consultation with the student, family, medical provider (where appropriate), and the school district.
Part 3) Reason =	Clear in the explanation that the fact or situation explains why the non-participation reason is justifiable/happened.

Off Grade Testing

Students are required to take all statewide assessments for which they are eligible in accordance with the enrolled grade within EDUCATE (IC). Students may not participate in off-grade testing for statewide assessments.

Retesting and Double Testing

Every eligible student is required to complete each component of the administered statewide assessment exactly one time (e.g. MAST testlet, WIDA ACCESS domain) with the exception of DLM testlets when available. Students moving from school to school throughout the year may not retake any assessment or assessment component administered at a previous school. Students may not retake any assessment or assessment component within the same academic year.

Statewide Assessment Test Registration Process

The ability to identify students for assessments is a critical element of the testing. The contractor-owned online test delivery systems (or TDS) require student information to manage and deliver online and paper-based assessments. EDUCATE (IC) allows school districts to submit required student information electronically. EDUCATE (IC) provides the state of Montana, federal entities, and education communities with timely and accurate information about students, school districts, and the state (see [EDUCATE \(IC\) Policy References](#)). The [AEDUCATE \(IC\) Data Flowchart](#) further depicts how school districts' student information (or data) flows to the OPI.

After the first school district submission (or sync) to the state, which occurs according to the assessment-specific [EDUCATE \(IC\) Collection Schedule](#), the OPI sends records for students with primary enrollment from EDUCATE (IC) to these online test delivery systems. These student data are reported to the test delivery contractors on a regular basis as published in the [TDS Student Data Upload Schedule](#). Students must have a record in EDUCATE (IC) and primary enrollment to participate in statewide assessments.

The OPI uses data from EDUCATE (IC) to identify and register students for statewide assessments. Per the published [EDUCATE \(IC\) Collection Schedule](#) and the [TDS Student Data Upload Schedule](#), a student data file is shared with the test delivery contractors to add, update, or remove student records from the online TDS portal. The goal with this continuous process is to keep the portals as synced as possible given that each school district submits data to EDUCATE (IC) on a district-defined schedule

If a student with primary enrollment is enrolled in multiple school districts in EDUCATE (IC), the resolution process requires finding out which district should be reporting the student as primary, and which should be reporting as non-primary. The enrollment record(s) must then be synced to EDUCATE (IC). This cannot be resolved by the OPI alone and may require staff from multiple districts to contact one another directly to resolve the issue. As such, the OPI strongly advises school districts to create firm enrollment policies to ensure that all students are provided the opportunity to participate in statewide assessments.

For more information on reporting in EDUCATE (IC), visit the [EDUCATE \(IC\) User Guide](#), [EDUCATE \(IC\) Collection Schedule](#), and/or contact the EDUCATE (IC) Help Desk at (877) 424-6681 or OPIAIMHelp@mt.gov.

EDUCATE (IC)/TDS Student Data Upload FAQs

Q: When does the OPI upload student data into each TDS?

A: See the OPI [TDS Student Data Upload Schedule](#) for the upload dates for each statewide assessment.

Q: How does the OPI student upload occur?

A: All student data uploads occur using a query to pull student information directly from the EDUCATE (IC) database. The query then goes through a quality review process with OPI staff prior to being saved as a .csv file placed on a shared secure server with the TDS portal that integrates the file virtually into their test management system.

Q: What if a student is missing in the TDS portal?

A: All calls about a missing student in an assessment portal go through a series of steps per the [MontCAS Data Privacy Policy](#). To troubleshoot the issue, the Assessment Unit uses a routine protocol. For illustration purposes the routine TDS Data Protocol steps are as follows:

1. Confirm the local data exists as all EDUCATE (IC) data originate at the local level.
2. Use EDUCATE (IC) search tools to identify whether the missing student exists as a record in EDUCATE (IC).
3. Involve EDUCATE Unit Specialists as necessary, as the front-end access to EDUCATE (IC) is limited.
4. If the student is not in EDUCATE (IC), is enrolled in two different schools, or there are any other number of visible discrepancies, the issue is referred to the EDUCATE Help Desk at (877) 424-6681 or OPIAIMHelp@mt.gov.
5. If the student is present in EDUCATE (IC), Assessment Unit Specialists investigate the student file generation query logic to troubleshoot.

Note: The large majority of enrollment issues stem from local input or the EDUCATE (IC) syncing process. Once the changes are made in EDUCATE (IC), corrected enrollments will sync within 48 hours or as published in the [TDS Student Data Upload Schedule](#).

Q: What if a student is missing his/her IEP designation in a TDS portal?

A: All calls relating to whether a student is missing his/her IEP or 504 Plan in a TDS portal go through a series of steps per the [MontCAS Data Privacy Policy](#). To troubleshoot the issue, the Assessment Unit will use these routine protocol steps in conjunction with the Special Education Division to provide support:

1. Using the TDS portal search tools, the Assessment Unit Specialists attempt to identify whether the student exists as a record and identify the associated student IEP/504 demographic flag details.
2. If the student exists in the TDS portal, a referral to troubleshoot the EDUCATE (IC) IEP/504 data may be made to OPI's Student Support Services Division for Special Education Specialists.
3. Once the EDUCATE (IC) changes are made, the IEP/504 designation data typically syncs within 48 hours or as published in the [TDS Student Data Upload Schedule](#).

4. The Assessment Unit Specialists will involve Special Education Specialists as necessary as the front-end access to EDUCATE (IC) is limited.
5. If the student is not in EDUCATE (IC), is enrolled in two different schools, or there are any other number of visible discrepancies, the issue is referred to the EDUCATE Help Desk at (877) 424-6681 or OPIAIMHelp@mt.gov.
6. If the student is present in EDUCATE (IC), Assessment Unit Specialists investigate the student file generation query logic to troubleshoot.

Q: What if a student is missing in an alternate TDS portal?

A: A student requires the alternate flag in EDUCATE (IC) to be marked in order to be eligible for the alternate assessments. Students eligible to participate in alternate assessments make up approximately 1% of the total student population. The decision to move a special education student to an alternate assessment has significant implications for the path that a student will take in their K–12 school career. It means the student is not able to participate in the general education curriculum even when provided with accommodations. A student who participates in an alternate assessment requires a modified curriculum (see [Eligibility Guidelines for MontCAS Alternate Assessments](#) document).

If an alternate student is not showing up in the alternate TDS portal, it is assumed that the alternate flag is not checked, and the Assessment Unit Specialists will implement the Special Education TDS Data Protocol.

Q: What if an unenrolled student is still appearing as enrolled in the TDS?

A: For the MAST, MSA, DLM ELA/math, and DLM Science testing portals, the student record in a school persists in the TDS portal until that school reports, via EDUCATE (IC), that the student has exited. Once an exit date is reported for a student, the student's record will be sent with a "delete" indicator to the TDS, and the record will no longer be visible or editable in the TDS by the district that reported the exit date. For the WIDA ACCESS and ACT with Writing portals, students remain in the portal unless deleted by an Assessment Unit Specialist. Contact the OPI Assessment Unit to confirm unenrollment and have the student(s) manually removed from the portal. All student data is reconciled against enrollment records before results are finalized each year.

Statewide Assessment Participation Rate Calculation

MAST Through-Year Participation Calculation

Federal law requires 95 percent participation for all students and 95 percent participation for student subgroups (consisting of 10 or more students) to participate in the required content areas including math and ELA. As MAST is administered over multiple windows throughout the year with unique testlets in each window, participation is based on testlets available to each student over the course of the academic

year. A student is required to complete all math and ELA testlets available to them within each testing window.

A student is considered a participant if the student completes the minimum number of test items necessary to calculate a valid summative score in math and ELA respectively. All testlets available to a student that are not completed count as no score in calculating the overall summative score.

A student would be exempt from individual testlets for reasons including mobility (not enrolled in a school during a testing window) and approved medical exemptions (see [Montana Medical Exemption Policy](#))

School and subgroup participation is calculated by dividing the total number of students achieving participation by the total number of students eligible for participation based on enrollment for a full academic year.

DLM ELA, Math, and Science Participation Calculation

For each DLM window (fall and spring for ELA and math and spring for science) students are required to fulfill an assigned blueprint found in the Kite Educator Portal in order to receive a summative score in the respective content areas and be identified as a participant.

A student would be exempt from individual testlets for reasons including mobility (not enrolled in a school during a testing window) and approved medical exemptions (see [Montana Medical Exemption Policy](#)).

Summative Assessment Model Participation Calculation

Federal law requires 95 percent for all students or 95 percent of student subgroups (consisting of 10 or more students) to participate in the required content areas and 100 percent of English Learners to participate in the WIDA ACCESS for development of English language proficiency. For assessments administered in a summative window (WIDA ACCESS, MSA, and ACT), participation is calculated by dividing the total number of students that participated in the assessment by the total number of students eligible for participation within the summative assessment window and eligible for participation based on enrollment for a full academic year (FAY).

References

1. [ARM Chapter 55](#)
2. [ARM Chapter 56](#)
3. [Eligibility Guidelines for MontCAS Alternate Assessments](#)
4. [Eligibility and Identification Criteria for English Learners](#)
5. [English Learner Guidance for School Districts](#)
6. [Free Appropriate Public Education for Students with Disabilities \(2010\). U.S. Department of Education's Office of Civil Rights](#)
7. [MCA §20-2-121](#)
8. [MCA §20-3-323](#)
9. [MCA §20-5-103](#)
10. [MCA §20-7-111](#)
11. [MCA §20-9-309](#)
12. [MontCAS Collection Schedule](#)
13. [MontCAS Data Privacy Policy](#)
14. [MontCAS Application User Guide](#)

Last Updated August 2025

15. [OPI Published Testing Window](#)
16. [OSEP Memo on Educational Expenses for Children in Private Residential Facilities 2005](#)
17. [Published Testing Window](#)
18. [Six Things Stakeholders Should Know About Participation and Testing in Montana](#)
19. [Student Privacy on FERPA and COVID-19 Guidance](#)

Appendices

[Appendix A: Medical Exemption Medical Professional \(Sample Form\)](#)

[Appendix B: Medical Exemption Parent-Family \(Sample Form\)](#)

[Appendix C: Medical Exemption MontCAS Application Reporting Instructions](#)