

PUTTING STUDENTS FIRST



Coffee Talk Overview of the State Aid Claim Forms



State Aid & Financial Planning Service
July 2022



Welcome to 2022-23!



2

□ Review of our various webinars:

□ **Coffee Talk:**

- Focused on the major responsibilities of the SBO

□ **Knowledge Café –**

- Supports the Coffee Talk
- More hands-on examples of how to complete selected tasks
- Looks ahead at the tasks due in the following month

□ **BO-Talk:**

- Focused on the major responsibilities of the BOCES BO

□ **STAC Talk:**

- Provided by the STAC Service
- Focused on assisting those responsible for claiming Excess Cost Aid and/or Homeless Aid

Upcoming Special Training

3

July 13th, 2022:

9:00 a.m.


*Preparing the 22-23
Transparency Report*



Serving School Districts & BOCES for 50 Years!
518-477-2635 | sap.questar.org

Claim Forms in SAMS

4



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Search State Aid

NEW YORK STATE EDUCATION DEPARTMENT Index A-Z | Calendar

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State Aid

[View District Data](#)

Go **Clear**

2021-22 Calendar of Deadlines

2021-22 State Aid Handbook

Topics

SAMS

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SAMS 2021-22 Help

Training Material

SAMS Public Reports

General State Aid Information

Forms

Contact Us

Links to Related Sites

NYSED / State Aid / SAMS

State Aid Management System (SAMS)

Contact: State Aid Unit

The State Aid Management System (SAMS) is a secure information system that facilitates the collection and processing of data required by the New York State Education Department (NYSED) to distribute annual state aid to all New York school districts. SAMS is accessible to authorized users from each school district, staff from the State Aid unit of the Education Department, and other

Claims Open in August

09-02-2021
Now Available - [2021-22 BOCES State Aid Claim Forms are now available in SAMS](#)
For SAMS operating instructions/training materials go to [SAMS/Training Materials](#)

08-18-2020
Now Available - [2020-21 Claim Forms are now available in SAMS](#)
For SAMS operating instructions/training materials, go to [SAMS Training Materials](#)

Entity Name

BEDS Code

Claim Year **2022-23** **SET VALUES**

SAMS
NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM

Welcome (School Entity User) CORE Hon

Entity Info | Forms | Claim Verifications | Activity Log | Reports |

Reporting
2021-22
Actual
information
for
2022-23 Aid

Expand All | Collapse All

☐ Core Forms

- A** ☐ [Form A and Schedules: Clean](#)
- A** ☐ [180 Days Calendar: Certified](#)
- A** ☐ [Form FB : Building And Misc.: Clean](#)
- A** ☐ [Form FT : Transportation: Clean](#)
- B** ☐ [Form BP : Bus Purchase:](#)
- A** ☐ [ST-3 Forms and Schedules \(Financial\): Clean](#)
- A*** ☐ [RSU Forms and Schedules:](#)
- A*** ☐ [CPSE Administrative Forms and Schedules](#)
- C** ☐ [Schedule F6 : Bus Amortization: Clean](#)
- D** ☐ [Administrative Compensation Information: Clean](#)
- E** ☐ [Property Tax Report Card: Clean](#)
- ☐ [NYSED Only Form Set:](#)

Key:

A = Due 9/2/22

B = Due by 6/30/23 for aid to start in 23-24; best practice is to complete when bus purchased

C = Due 9/1/22

D = Due May each year

E = Due April each year

***** = Not completing timely will not delay current aid, but will affect those specific revenues eventually

Entity Name

BEDS Code

Claim Year

SAMS

NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM



Welcome

CORE

Home | Issue Reporting | Help | Logout

Entity Info | Forms | Claim Verifications | Activity Log | Reports |

Verify that your
Entity Info is up
to date

CORE SAMS Homepage

Note: There is a known issue with SAMS and Microsoft's newest version of Internet Explorer 11.

Education Department staff is attempting to resolve this issue.

In the meantime, you can do the following to address this matter:

1. Downgrade to an earlier version of Microsoft's Internet Explorer or,
2. Use an alternate web browser (Mozilla's Firefox or Google's Chrome browsers are the recommended browsers).

SAMS - [Latest News and Updates](#)

Entity Code	Entity Name	Entity Type	
	CSD	MAJOR	
BOCES Code	BOCES Comp	RIC Code	Title
	0	1	SUPERINTENDENT
Salutation	First Name	MI	Last Name
Superintendent's Email Address			
Superintendent's Phone Ext			
Address Line 1			
Address Line 2			
City	State	Zip Code	

State Aid Designee

Salutation	First Name	MI	Last Name	Generation
Title				
Phone	Ext	Fax	Email Address	
Contact Active Date	Position Active Date			

[Edit Entry](#)

Director Of Special Ed.

Salutation	First Name	MI	Last Name	Generation
Email Address				
Contact Active Date	Position Active Date			

Salutation	First Name	MI	Last Name	Generation
Email Address				
Contact Active Date	Position Active Date			

Salutation	First Name	MI	Last Name	Generation
Email Address				
Contact Active Date	Position Active Date			

[Edit Entry](#)

Transportation Contact

Salutation	First Name	MI	Last Name	Generation
Title				
Phone	Ext	Fax	Email Address	
Contact Active Date	Position Active Date			

[Edit Entry](#)

Positions Listed:

- Superintendent
- State Aid Designee
- Director of Special Education
- Fiscal Advisor
- ST-3 Contact
- Transportation Contact

**Verify that your
Entity Info is up
to date!**

**Any
Retirements?**

**Changes in
roles?**

**Also, now is a
good time to
make sure
Superintendent's
password is
up-to-date**

Task with First Due Date

Schedule F6 – Bus Amortization

8

If you issued debt between 7/1/21 and 6/30/22 to purchase school buses, complete and certify Form Set Schedule F6.

Due by September 1, 2022, even if none of your other SAMS forms are complete.



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Contact Person:	
-----------------	--

Telephone:

Tel Extension:

Schedule F6: Bus Amortization

Only For New Borrowings Made Between 7/1/2020 and 6/30/2021

	Borrowing Amount	Date of Borrowing		1st Year 2020-21	2nd Year 2021-22	3rd Year 2022-23	4th Year 2023-24	5th Year 2024-25	6th Year 2025-26
1.	695,750	09/18/2020	P =	139,150	139,150	139,150	139,150	139,150	
2.	Int Rate:	1.190	I =	8,279	6,624	4,968	3,312	1,656	
3.			P =						
4.	Int Rate:		I =						
5.			P =						
6.	Int Rate:		I =						

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Let's Walk through the Claim Forms Tree



Form A and Schedules

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Form A and Schedules: Clean

 Form A (Attendance) Ready

Schedule A-1 Religious Holidays First Semester Ready

Schedule A-2 Attendance Report First Semester Ready

Schedule A-3 Religious Holidays Second Semester Ready

Schedule A-4 Attendance Report Second Semester Ready

Schedule A-5 Days of Session Matrix Ready

Schedule A-6 Decimal Days of Actual Session Worksheet Ready

Schedule A-7 Enrollment - Central High School Districts Only Ready

Schedule A-8 Extraordinary Condition Days Ready

 Schedule B - Dual Enrollment Ready

 Schedule C - Designation of Textbook, Software, Library Materials and Hardware Expenses Ready

Schedule P - Additional Data for Calculations

 Schedule U1 - Charter School Enrollment and FTE Ready

 Form A Edit Report Clean

 Form A Certification Certified

Report all things related to student attendance for the previous year (21-22) and the estimated attendance for the following year (22-23)

 All Should Do

 May Need to Do

State Aid Factors Refresher

12



- The variables that determine the aid paid to a district:
 - ▣ **Pupil Counts**
 - Several methods of counting students – rule of thumb is that more students should equate to more aid
 - ▣ **District Wealth**
 - Both income and property wealth are equalized against statewide averages
 - ▣ **Pupil Needs**
 - ELL, FRPL and Census Poverty Counts indicate the number of students with greater need for services
 - ▣ **Aidable Expenditures**

Pupil Counts

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- ▣ Attendance/Enrollment
- ▣ Grade level
- ▣ Types of services received
 - Special education pupils-levels of service
 - Academic Summer School
- ▣ Residents/Nonresidents

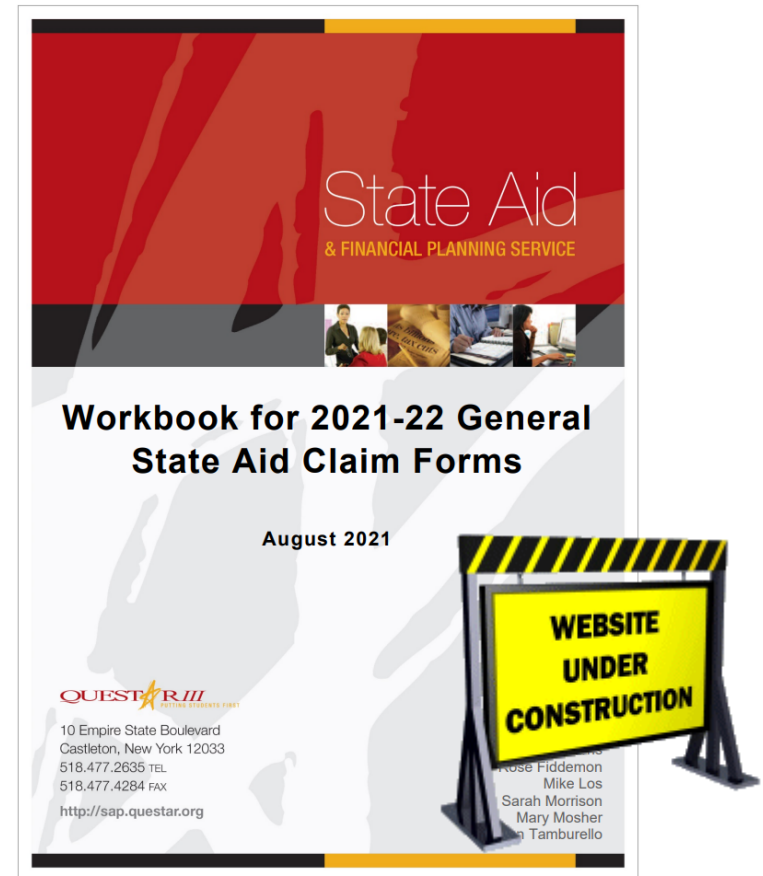


Key Source of Information is Form A

Form A Tips

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- ❑ Not familiar with the information that needs to be reported on Form A?
- ❑ Check out our guidebook – it gives detailed instructions for each line of the Claim Form
- ❑ Remember that SAMS has a great *Help* function too!
























Guidebooks available at:
sap.questar.org under the
Guidebooks Link

SAMS Help

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State Aid Management System (SAMS) Help

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SAMS Forms

[Form A and Schedules](#)

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[Schedule F6: Bus Purchase Amortization](#)

[Form St-3 and Schedules](#)

[RSU Forms and Schedules](#)

[CPSE](#)

[Administrative Compensation Information Form](#)

[Property Tax Report Card](#)



SAMS Help Example

Directions For Schedule A-1 (Religious Holidays Semester 1)

Only attendance on religious holidays occurring during the first semester of the 2019-20 school year and duly recognized as such by a resolution of the board of education should be reported on this schedule. Aggregate attendance of each religious holiday listed should be reported on this schedule for all grade levels. Do not list any religious holidays which had no adverse impact on school attendance.

Directions For Schedule A-2 (Attendance Semester 1)

Possible aggregate attendance reported in column 1 represents the sum of the total daily membership (number of students on the school register on a given day) for each day of session reported in column 4.

Aggregate attendance reported in column 2 represents the sum of the total daily attendance (number of students actually attending school on a given day) for each day of session reported in column 4.

Schedule A2 shall include attendance data for:

- Resident students in kindergarten through grade 12 (or equivalent ungraded programs), which is the total of the number of enrolled students that could have attended school on all days of session divided by the number of days of session
- Non-resident students (in-state and out of state) attending the district full time but not resident students enrolled full time in another district;
- Indian students that are residents of any portion of a reservation located wholly or partially in New York State;
- Students living on federally owned land or property;
- Resident students receiving home or hospital instruction (not home-schooled students), including students receiving instruction through a two-way telephone communication system.

Note: On Schedule A2, do not include the aggregate attendance days for students enrolled at Tech Valley High School located in Albany, NY, which is jointly operated by Albany BOCES (019000) & Questar III (499000).

Form A Tips

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- ❑ Give whoever is going to gather the information a copy of the SAMS help files and/or our Claim Forms Guidebook for guidance
- ❑ Provide a copy of last year's forms (for comparison) and a blank copy of the forms for summarizing 21-22 information and 22-23 projections
- ❑ Discuss when information is needed by and why reporting accurately is so important
 - ▣ Drives aid!

Schedule B – Dual Enrollment

18

- ❑ **Dual enrolled pupils** are those pupils enrolled in a *non-public school* in any district who, for some portion of the day or week, *receive services from the public school district* in the areas of special education, occupational education or gifted education.
- ❑ If you have non-public school pupils (either from within or outside your district) for whom you provide services in one or more of these areas, you should claim them on **Schedule B**.
- ❑ Reporting these pupils helps maximize aid.

Schedule C – Designation of IMA Expenditures

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Designation of Textbook, Software, Library Materials and Hardware Expense

Aid Area	1. District Reported 2021-22 Expense Eligible for Instructional Materials (ST-3)	2. 2022-23 Maximum Aid Allocations	3. District Designated 2021-22 Expense for Instructional Materials Aids Calculation
A. Textbook			
B. Software			
C. Library Materials			
D. Instructional Hardware			
E. Total	Sum of 4 items above	Sum of 4 items above	Sum of 4 items above



Check this Schedule after the ST-3 is completed.

If, in any line, Column 1 is lower than Column 2, see if you can reclass expenditures in Column 3 to another line to maximize IMA.

Schedule U – Charter School Enrollment

20

Does your district have any children in Charter Schools?

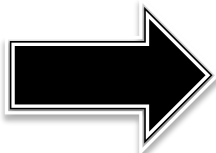
Schedule U: Charter School Enrollment and FTE

Part I - Total Enrollment for Resident Students attending Charter Schools within and outside the school district		2019-20 School Year (Prior)	2020-21 School Year (From SED)*	2021-22 School Year (Projected)
1.	1/2 Day K Unweighted Enrollment	0		
2.	Full Day K Enrollment	77	84	70
3.	Grades 1-3 Enrollment	241	227	230
4.	Grades 4-6 Enrollment	176	200	195
5.	Grades 7-12 Enrollment	189	222	210
6.	TOTAL RESIDENT ENROLLMENT	683	713	705
7.	Total Projected 2022-23 enrollment of resident students attending Charter Schools within and outside the school district			720
				Projected enrollment School Year 2022-23

Note: Full Time Equivalent (FTE) Enrollments should be computed using the "FTE Calculator" on the State Aid Internet site at <http://stateaid.nysed.gov/ftecalc/calcfe.htm>.

Part II - Total FTE of resident students attending Charter Schools within and outside the school district		2019-20 School Year (Prior)	2020-21 School Year	2021-22 School Year (Projected)
8.	1/2 Day K FTE			
9.	Full Day K - Grade 3 FTE	305.18	276.78	300.00
10.	Grades 4-6 FTE	172.33	191.43	195.00
11.	Grades 7-8 FTE	91.20	103.41	105.00
12.	Grades 9-12 FTE	90.94	103.12	105.00
12a.	Total FTE of resident students attending Charter Schools within and outside the school district	659.65	674.74	705.00


Attention: Total 2020-21 FTE enrollment above will be multiplied by the district's 2020-21 Supplemental Basic Tuition amount to determine the district's 2021-22 Supplemental Basic Tuition (SBT) Aid. To ensure that this amount accurately reflects the supplemental basic tuition paid by your district to charter schools, please make sure the FTEs are accurate and based on reconciled end of school year charter school billing information.



180 Days Reporting and Form FB

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180 Days Calendar: Certified


 180 Days Calendar Waiver Form Ready

 180 Days Calendar Form Ready

 180 Days Calendar Certification Certified

Form FB : Building And Misc.: Clean


 Form FB : Building and Misc. Saved

 Interest Rate Reduction Waiver Application Form

 Schedule M2 - Expenses for Lease of Buildings Ready




 Schedule N - Security Cameras, Metal Detectors and Other Safety Equipment Ready

 Schedule T - Shared Services Aid - Big 5 and Non-components of BOCES Only Ready

 Schedule W - Water Testing Aid Ready

 Form F Building Edit Report Clean

 Form Set FB Certification Certified

- 
- All Should Do
-
- 
- May Need to Do
-
- 
- For Select Group

Form FB – Building and Misc.

22

Gathers a variety of information, including:

- Planning a Capital Outlay Project for 22-23?
 - ▣ Complete Lines 136 and 137
- Doing your Building Conditions Survey in 21/22 or 22/23?
 - ▣ Complete Lines 138 and 139
- Going to purchase security cameras, etc. (Schedule N items) in 22/23?
 - ▣ Complete Line 140



Form FB – Building and Misc.

23

Gathers a variety of information, including:

- Issuing debt in 2022-23?
 - ▣ Complete Line 174
 - ▣ SED uses your response to track you – they will be looking for SA-132/135 the following September
- Did you sell any school buildings in the last year?
 - ▣ If yes, complete Line 175
 - ▣ This information is used to potentially recalculate building aid being paid on building(s) sold

Interest Rate Reduction Waiver

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- When Building Aid switched to being based on a statewide average interest rate, it also required all projects being aided:
 - ▣ Every 10 years be subject to:
 - ▣ Having the interest rate used for Building Aid calculation to be reviewed to see if it should be adjusted down
 - ▣ This form is used to request a waiver from having your Building Aid reduced



Interest Rate Recalibration Statute: NYSEL 3602 6 (e) (5) (c) Education law requires the commissioner to revise the assumed amortization schedule for remaining debt service payments for outstanding principal and interest periodically, but at least once for each 10 year segment of an assumed amortization, if the current interest rate is at least one quarter percent (.25) lower than the original interest rate for the assumed amortization.

Interest Rate Reduction Waiver

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Interest Rate Reduction Waiver Application Form

For complete details on Project data: [Explanation of Project Data](#)

For instructions on filling out the form, please see the SAMS Help file.

Reasons for Waiver Request:

1. Bond Issued as Non Callable
2. Already refinanced; additional advance refunding not permitted. Bond not currently callable until future date
3. Refunding this bond would not meet savings threshold in NYS Local Finance Law
4. District would exceed its constitutional debt limit as a result of refinancing

Prospective Project Waiver Application

Project Number		2021-22 Estimated Single Year Aid Impact	Estimated Total Aid Impact over Remaining Life of Project	Are you applying for a waiver for this project?	Date of Bond Issue Currently Financing this Project (Enter In MM/DD/YYYY Format)	Reason for Waiver Request	Call Date (Enter In MM/DD/YYYY Format)	Waiver Approved?
5016	003	-17	-86	Yes	11/09/2017	Already Refinanced; Additional Advance Refunding Not Permitted [2]	10/01/2028	Y

Summary Of Estimated Aid Impact

2021-22 Estimated Aid Impact: All Projects	2021-22 Estimated Aid Impact: Excluding Waived Projects	Estimated Aid Impact Over Remaining Life: All Projects	Estimated Aid Impact Over Remaining Life: Excluding Waived Projects
-17	0	-86	0

-Will be pre-filled with any projects that you need to be concerned with

-Check back in December to see if waiver approved

Or....

If No Prospective Projects Are Listed Here, The District Has No Project Amortizations Subject To Interest Rate Reduction In 2021-22.

No further action needed!

Schedule N – Security Cameras...

26




- ❑ Check with your Facilities Director – did your district purchase any security cameras, metal detectors, electronic security systems, hardened interior or exterior doors in 21-22?
- ❑ If yes, the district can get State Aid (paid at your Building Aid ratio) in the following year, if claim on Schedule N.

Schedule N – Security Cameras...

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Directions For Schedule N

- The Total Security Camera Expense claimed on this form cannot exceed \$35,000. Refer to link: [Maximum Cost Allowance for Security Cameras](#)
- Do not claim expenses on this form that were/are included in any capital project.
- Please retain purchase orders for claimed expenses **and invoices** for claimed expenses. The State Aid Office or the Office of Facilities Planning may request documentation of these purchases in the future.
- Only enter claims for which Date of Purchase/Invoice date is on or after July 1, 2021 and including but not later than June 30, 2022.
- For current 2022-23 Aid, 2021-22 expenditure claims should be submitted to SED no later than 6/30/23. 
- Portable or hand held metal detectors are not eligible for aid.
- Do not claim expenses for school bus cameras on this form. Only security cameras installed in school buildings should be claimed on this form.



Schedule W – Water Testing



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Schedule W - Water Testing

Notes:

1. Include in the 'Actual' column data from testing conducted during the 2020-21 school year.
2. Costs reported in the 'Actual' column will generate 2021-22 aid. However, districts may be contacted by the Office of Facilities Planning to discuss the information reported below, and in some instances districts may be asked to revise.
3. Pursuant to New York State Department of Health (NYS DOH) regulation: Districts must retain all records of test results, lead remediation plans, determinations that a building is lead -free, and waiver requests for ten years. Copies of such documentation shall be immediately provided to the NYS DOH, local health department or State Education Department, upon request.
4. For additional information see link below:
 - [Guidance on State Aid for Water Testing](#)

Schedule W - Water Testing Aid (WTR)

2020-21
School year
(Actual)

1. Testing of Potable Water Outlets

- a. Number of Potable Water Outlets Tested
- b. Number of 'first - draw' water samples collected
- c. Number of samples yielding lead concentration above the action level (15 parts per billion)
- d. Number of confirmatory water samples collected to: verify initial findings of lead contamination (required by EL 3602 (6-h) for remediation costs to be eligible for aid), assist in problem assessment to determine remediation and/or verify that lead levels are at or below action level post-remediation (pursuant to New York State Department of Health (NYS DOH) regulation Section 67-4.4).
- e. Total cost of all water testing conducted
- f. Average testing cost

475

475

34

34

4,764

9

2. Not Used

3. Total testing cost for aid

4,764

4. Not Used

5. Not Used

6. Aidable Expenditures for Water Testing

4,764

2021-22
School year
(Projected)

7. Pursuant to NYS Department of Health regulations, Section 67-4, the deadline for the initial collection of water samples for lead testing was in fall 2018 and the remediation measures were required to be both "immediate" and "effective". Chapter 53 of the laws of 2019 provide that, beginning in the 2019-20 school year, only expenditures for water testing are aidable under this provision. **Therefore, report any 2021-22 projected water testing expenditures below:**

Water Testing 2021-22 Projections











0




Please contact the Office of Facilities Planning at 518-474-3906 if you have questions about the content of this form or how to complete it. Contact the State Aid Office at 518-474-2977 with technical questions about the functioning of the form in SAMS.

Form FT - Transportation

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Form FT : Transportation: Clean

-  Form FT : Transportation Ready
-  Schedule G - Transportation Equipment Ready
-  Schedule H - Transportation Supplies and Materials Ready
-  Schedule I - Contractual Transportation Expenses for District Operated Programs Saved
-  Schedule J - Contract Bus Expense
-  Schedule K - Public Service Carrier
-  Nonallowable Pupil Decimal 1
-  Nonallowable Pupil Decimal 12
-  Form F Transportation Edit Report Clean
-  Form Set FT Certification Certified

-  All Should Do
-  May Need to Do
-  For Select Group

Form FT - Transportation

30

- ❑ Claim Form reports various data points that are used to determine eligible expenditures for 22-23 Transportation Aid
- ❑ Work with your Transportation Supervisor to gather some of the information:
 - ❑ Miles driven: Lines 110 – 115
 - ❑ Student counts on buses: Lines 127 -130



Form FT - Transportation

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- Work with your payroll staff and/or Treasurer to calculate:
 - ▣ Fringe benefits for Transportation staff
 - ▣ Report on Lines 117-118
 - Allowable benefits include:
 - Health/dental – single coverage only
 - FICA
 - ERS
 - WC, UE, EAP
 - ▣ Salaries and fringes of assistant drivers (monitors, aides and escorts not required by an IEP)
 - ▣ Lines 174 – 175
- Make sure to reconcile what is reported on Form FT to ST-3



Form FT - Transportation

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- Are you doing shared Transportation services?
 - ▣ If yes, complete Lines 134 – 134e
 - ▣ Work with Treasurer to ensure revenues from shared services are reported properly in the ST-3 for both 21-22 actual and 22-23 projected – A2304
 - ▣ Revenues received lower the eligible Transportation cost
- Driving any foster care students > 50 miles? If yes, Line 135

Form FT - Transportation

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- ❑ Buying or leasing buses in 22-23? Important to report this on Lines 164-165
 - ▣ Executive Budget 23-24 uses this information



Part XII. Total Cost of Buses to be Purchased and New Buses Leases During the 2020-21 School Year for Projection of 2021-22 Transportation Capital Aid

164.	Total Purchase Price (Not Borrowing Amount or Debt Service Payment) of All Buses/Vehicles With Purchase Order Date Between 7/1/20 and 12/31/20, to be used 100% of the Time For Pupil Transportation and Assigned to a Regular Route.	172,843
165.	Total Purchase Price (Not Borrowing Amount or Debt Service Payment) of All Buses/Vehicles With Purchase Order Date Between 1/1/21 AND 6/30/21, to be used 100% of the Time For Pupil Transportation and Assigned to a Regular Route.	
	Total Cost (Not Annual Payment) of All New Bus Leases and Transportation	

Schedules G, H, I, J, K

34

- ❑ Requires you to detail out what was spent during 21-22 in Transportation Dept, except for salaries
 - ▣ Report only Transportation Aid eligible expenses
 - ▣ ST-3 expenditure codes includes both categories; schedules are for eligible expenditures only
 - ▣ If not sure if expenditure is aidable or not, schedules have links to list of eligible/non-eligible items

Schedule H: Transportation Supplies and Materials

NOTES:

- Do not include expense for any of the items included in the Non-aidable section of the List of Aidable and Non-aidable anywhere on this schedule: Only include expenditures for aidable items on this form.
- Do not include supplies and materials for vehicles not used for pupil transportation.
- If claiming miscellaneous Materials & Supplies please provide a specific description of the expenditure that can be identified as an aidable expenditure by State Aid staff

[List of Aidable and Non-aidable Items](#)

Schedules G, H, I, J, K

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Schedule	Type of Transportation Expenditure	ST-3 Codes
G	Equipment	A5510.2, A5530.2
H	Supplies and Materials	A5510.45, A5530.45
I	Contractual	A5510.4, A5510.49, A5530.4
J	Contract Bus	A5540.4, A5581.49
K	Public Service Carriers	A5550.4

Non-Allowable Pupil Decimal Worksheets

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- Why these forms are here:

Non-Allowable Pupil Decimal (NAPD) Information

Section 156.7 of the Commissioner's Regulations requires that school districts provide documentation of a new nonallowable pupil decimal at least once every three years or if certain changes have occurred. Documentation should represent information regarding school bus routes and trips as of one, and only one day of regularly scheduled school session during any of the following months: March, April, or May. Documentation is to be submitted on a worksheet prescribed by the Education Department. Districts will receive this worksheet in an electronic format as part of the State Aid forms distributed each year in July.

- Results will determine a percentage that is used to lower the amount of the expenditures eligible for Transportation Aid

Non-Allowable Pupil Decimal Worksheets

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- Website [NYSED:State Aid \(NAPD\) Non-Allowable Pupil Decimal Information](#) has:
 - List of districts that needed to have the NAPD calculation done this spring
 - Template for gathering the information
 - Detailed instructions for what needs to be gathered and reported

Summary of Recommendations for Claims Process

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Gathering Data:

- When should you start gathering data?
- Who should you involve in the process?



Process to Complete the Forms

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- ❑ Gather data and close your books
- ❑ Verify the data
- ❑ Enter data in SAMS
- ❑ Run Edit reports and address any edits
- ❑ Have Superintendent certify and submit
- ❑ Watch Activity Log for any questions or concerns

When are State Aid Claim Forms Due?

	Due Date for Submission of Data	Principal Purpose of the Data File
Original State Aid Claim Forms Submission	September 2, 2022 *	1. Reporting Actual 2021-22 Expenses and Data for 2022-23 Aid 2. Projecting 2022-2023 Expenses and Data for 2023-24 Aid
Revisions	October 15, 2022 **	NYS Executive Budget Proposal
	January 15, 2023 **	NYS Budgetary Negotiations and Final Enacted Budget
	April 15, 2023 **	Adjusted State Fiscal Projections or Final NYS Budget (If State Budget is late and Governor and Legislature elect to use latest revised data)

* Original State Aid Claim Forms are due by statute on September 2 or the first day of business in the month of September

** NYSED recommends submitting revisions by mid month to ensure inclusion in the following month's state database

Remember, It is Worth the Effort

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Next Coffee Talk

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August 17, 2022 @ 9 AM

Topic: Preparing the
State Aid Claim Forms:
*How to Complete and
Key Areas to Review to
Maximize Aid and
Troubleshooting Claim
Form Issues and
Revisions and Edits*



Contact Us



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State Aid & Financial Planning Service
10 Empire State Boulevard
Castleton, NY 12033
(518) 477-2635, Option #1
[sap.questar.org](mailto:sap.questar.org@qiiisap)
[@qiiisap](mailto:sap.questar.org@qiiisap)