



Notice



1

- Knowledge Café PowerPoints are available on our website under the **Webinar Tab**:
- <https://www.questar.org/services/financial/state-aid-financial-planning/webinars/knowledge-cafe/>

Then scroll
down.....

Here

Other Webinars

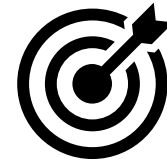
Monthly/Special Webinars focusing on a variety of topics.

The Knowledge Café

- Knowledge Café Zoom Link (Passcode: 319866)
-  2020-21 CTLE Registration Links
- Presentations
- Recorded Sessions

Note: Recorded Sessions have **moved** on our website – see new separate link.

PUTTING STUDENTS FIRST



Knowledge Café

April 2021

Sarah Morrison
State Aid Planning

April Agenda


3

- ❑ SBO Calendar for May 2021
 - ❑ Claiming Transportation Aid on Bus Purchases
 - ❑ Update on 180 Day Calendar for Fewer Regent Days
- ❑ School District Website Transparency OSC Audit
- ❑ SED Claims Verification Project Overview
- ❑ Questions and Answers



May SBO Calendar

4

| Task | Month | Due Date | Filing Requirement | Notes | Priority |
|---|-------|---|--------------------|---|----------|
| Each district notifies BOCES of the services it will buy in the next year. However, each district is obligated annually to pay its share of administrative, rental and facilities expenses | May | 5/1/2021 | Annually | Due date 5/10/21 | Required |
| Administrator Salary Disclosure must be completed & submitted & certified through SAMS within 5 days of preparation. | May |  | Annually | SED is required by law to prepare a statewide compilation of the salaries and other personnel costs of certain school administrators and make it available to all interested parties. Generally due on 5/1 - 5/1/2021 is a Saturday | Required |
| Budget Statement and required attachments must be made available seven days before hearing: April 27 - May 4, 2021 | May | 5/4/2021 | Annually | | Required |
| Budget Hearing no later than 7 days prior to budget vote | May | 5/11/2021 | Annually | Hold from May 4- May 11, 2021 | Required |
| Budget Notice must be mailed to eligible voters after the Budget Hearing and no later than six days prior to the vote: May 5 - 12, 2021. | May | 5/12/2021 | Annually | Use current template | Required |
| Maintain list of district residents who were issued absentee ballots and make available for public inspection in the office of the District Clerk until the day of the annual election and budget vote. | May | 5/17/2021 | Annually | Make available for public inspection the five days prior to the annual meeting except Sunday | Required |
| Annual Meeting - Uniform statewide budget vote and BoE election | May | 5/18/2021 | Annually | | Required |

May SBO Calendar

5

| Task | Month | Due Date | Filing Requirement | Notes | Priority |
|---|-------|-----------|--------------------|--|---------------------------|
| Ensure application for approval of bus/vehicle purchase (for any bus/vehicle delivered since January) have been submitted and certified within SAMS | May | 5/31/2021 | Semi-Annually | Ensure Superintendent certifies the Bus Purchase Approval before 6/30/2021 to receive one semi-annual payment of aid on the assumed debt service in 2021-22. | Recommended Best Practice |
| Billings (transportation, use of facilities, health services, parentally placed non-public etc.) | May | 5/31/2021 | Monthly | | Recommended Best Practice |
| Budget Status Reports to Board of Education including revenue and appropriation status reports | May | 5/31/2021 | Monthly | Commissioner's Regulations 170.2(p) requires the treasurer to render a budget status report for the BoE and for the use of those staff members assigned responsibility for administration of specific portions of the budget, on at least a quarterly basis (monthly in the event that budget transfers have been made since the last report). The report should include: estimated revenues, revenues received to date, and estimated revenues yet to be received; original appropriations, adjustments and transfers, revised appropriations, expenditures, encumbrances, and unencumbered balances pursuant to CR 170.2(p). Other information may be included as necessary. | Required |
| Cash Flow - modify and update | May | 5/31/2021 | Monthly | | Recommended Best Practice |
| Cash Flow and Fund Balance - review for accuracy | May | 5/31/2021 | Monthly | | Recommended Best Practice |
| Federal and State Cafeteria Reimbursement Form | May | 5/31/2021 | Monthly | | Recommended Best Practice |

May SBO Calendar

6

| Task | Month | Due Date | Filing Requirement | Notes | Priority |
|--|-------|-----------|--------------------|--|---------------------------|
| Federal and State Cafeteria Reimbursement Form | May | 5/31/2021 | Monthly | | Recommended Best Practice |
| File DCERT for any new or continuing 10-month private special education placements | May | 5/31/2021 | Monthly | | Required |
| Monthly Profit/Loss Statements for School Food Service | May | 5/31/2021 | Monthly | Perform analysis on prior month's activities | Recommended Best Practice |
| Payroll Reports – ERS and TRS Payments & Reports | May | 5/31/2021 | Monthly | ERS: Due the 7th day of the month following the report period. TRS: Due within 10 business days after the end of the previous month. | Recommended Best Practice |
| Prepare Final Cost Reports for capital construction projects as soon as certified as substantially complete and all outstanding bills are paid | May | 5/31/2021 | Monthly | | Recommended Best Practice |
| Review BOCES invoices for appropriate services and charges | May | 5/31/2021 | Monthly | | Recommended Best Practice |
| Review outstanding checks | May | 5/31/2021 | Monthly | | Recommended Best Practice |
| State and Federal Projects - review for expenditures and revenues. Submit FS-25's request for funds to Grants Finance | May | 5/31/2021 | Monthly | This is the form that must be submitted to request additional State and Federal grant funds. Districts may only request funds to cover expenses already incurred and 30 days of anticipated expenses. Payments totaling up to 90% of a grant's budget total may be requested | Recommended Best Practice |
| Treasurer's Report | May | 5/31/2021 | Monthly | Report on prior month's activities | Recommended Best Practice |

May SBO Calendar

7

| Task | Month | Due Date | Filing Requirement | Notes | Priority |
|---|-------|-----------|--------------------|-------|----------------------------------|
| If applicable, collect school bus route data for one day for Non-Allowable Pupil Decimal calculation. | May | 5/31/2021 | Annually | | Recommended Best Practice |
| Plan for Year End Closing and Summer Maintenance | May | 5/31/2021 | Annually | | Recommended Best Practice |
| Review School Calendar - ensure 180 days of session 900/990 hrs. of instruction (student attendance, superintendent conference days and Regents exams) | May | 5/31/2021 | Annually | | Recommended Best Practice |
| Year End Audit - call external auditor and arrange dates | May | 5/31/2021 | Annually | | Recommended Best Practice |

New:

SED is doing Claims Verification Project this month

OSC recently completed an audit of a group of school districts' websites for transparency compliance

Property Tax Report Card and Budget Notice

8

Property Tax Report Card:

- ❑ Due by April 26, 2021
- ❑ Submitted through SAMS
- ❑ Required to have BOE approval! Really! 😊

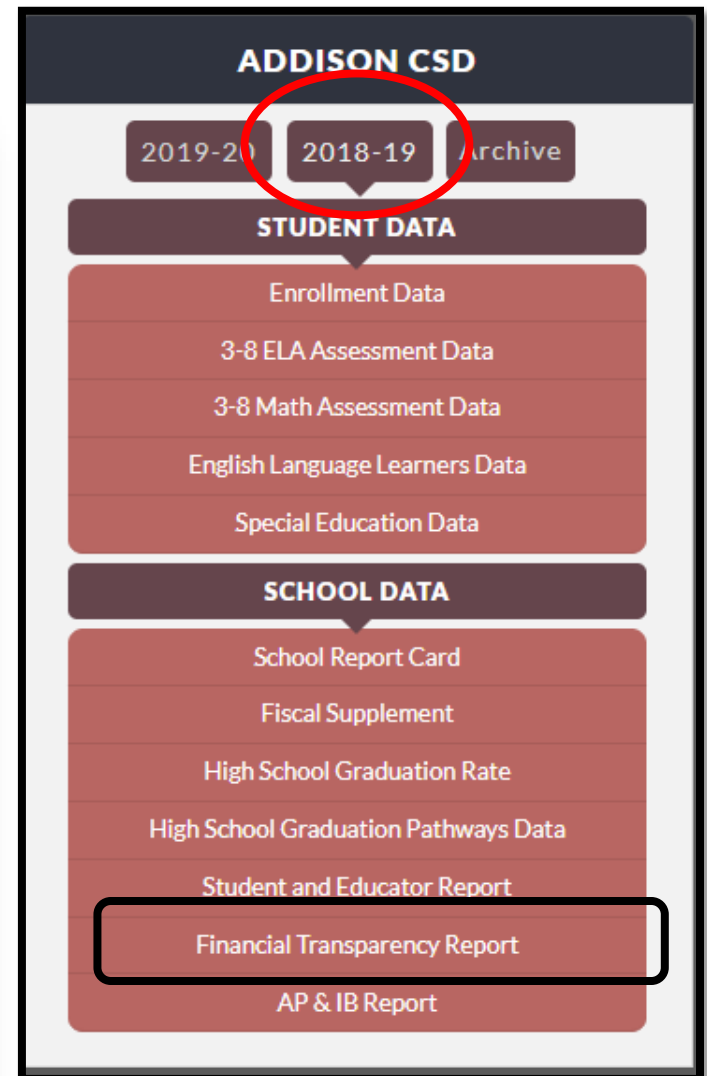
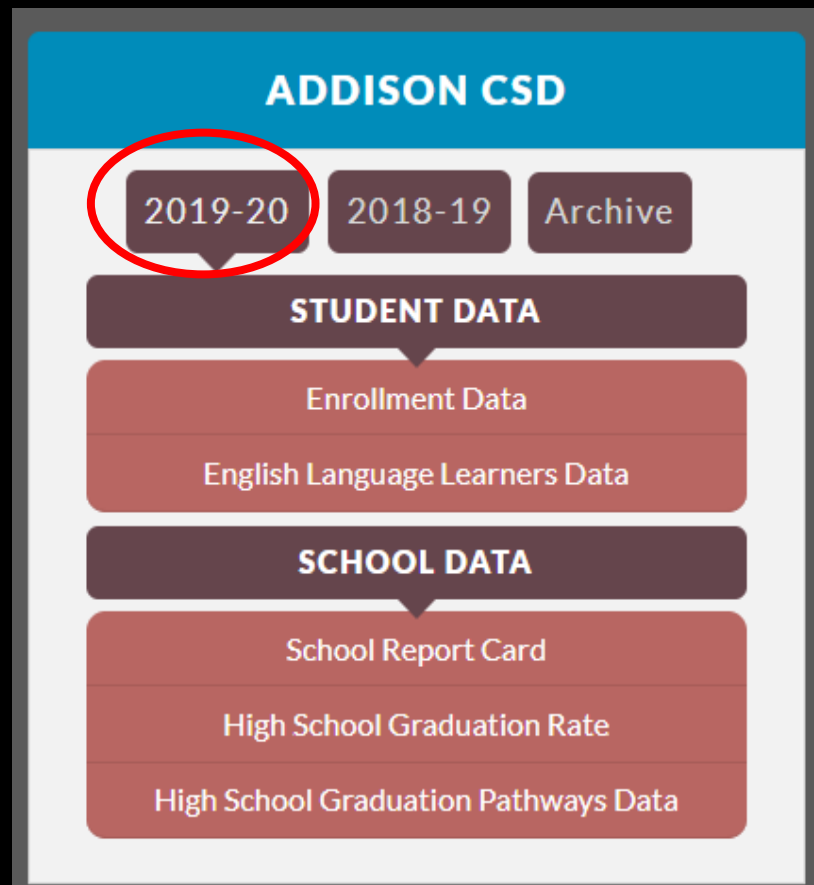
School District Budget Notice:

- ❑ Must be mailed to eligible voters after the budget hearing, but no later than May 12, 2021
- ❑ Must submit an electronic version (Word or PDF) of your completed Budget Notice to: emscmgts@nysed.gov
- ❑ To find STAR exemption for largest municipality:

https://www.tax.ny.gov/pit/property/star/max_index.htm

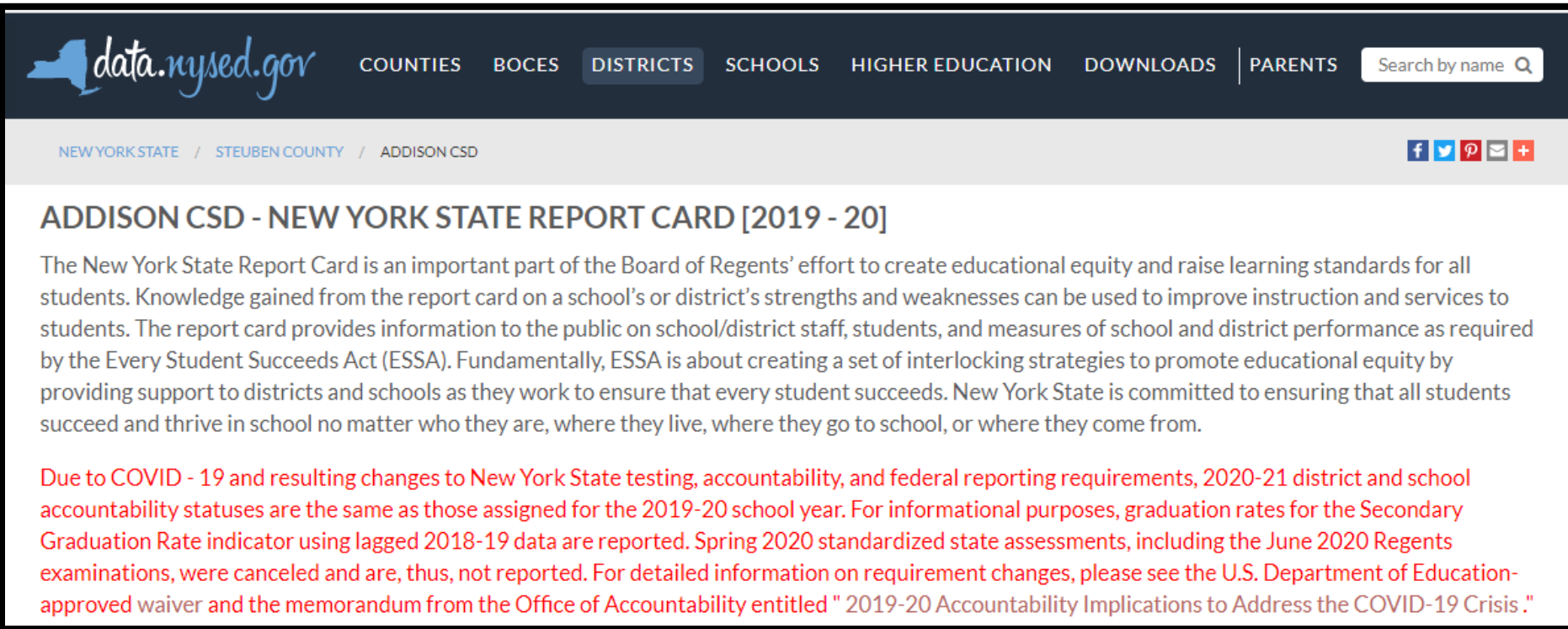
Where ESSA Reports Will Be

9



Note on data.nysed.gov

10



The screenshot shows the data.nysed.gov website. The header includes the logo and navigation links: COUNTIES, BOCES, DISTRICTS (highlighted), SCHOOLS, HIGHER EDUCATION, DOWNLOADS, and PARENTS. A search bar is on the right. The breadcrumb trail reads: NEW YORK STATE / STEUBEN COUNTY / ADDISON CSD. Social media icons are on the right. The main heading is "ADDISON CSD - NEW YORK STATE REPORT CARD [2019 - 20]". The text explains the report card's purpose and mentions COVID-19 related changes to testing and reporting requirements for the 2020-21 school year.

ADDISON CSD - NEW YORK STATE REPORT CARD [2019 - 20]

The New York State Report Card is an important part of the Board of Regents' effort to create educational equity and raise learning standards for all students. Knowledge gained from the report card on a school's or district's strengths and weaknesses can be used to improve instruction and services to students. The report card provides information to the public on school/district staff, students, and measures of school and district performance as required by the Every Student Succeeds Act (ESSA). Fundamentally, ESSA is about creating a set of interlocking strategies to promote educational equity by providing support to districts and schools as they work to ensure that every student succeeds. New York State is committed to ensuring that all students succeed and thrive in school no matter who they are, where they live, where they go to school, or where they come from.

Due to COVID - 19 and resulting changes to New York State testing, accountability, and federal reporting requirements, 2020-21 district and school accountability statuses are the same as those assigned for the 2019-20 school year. For informational purposes, graduation rates for the Secondary Graduation Rate indicator using lagged 2018-19 data are reported. Spring 2020 standardized state assessments, including the June 2020 Regents examinations, were canceled and are, thus, not reported. For detailed information on requirement changes, please see the U.S. Department of Education-approved waiver and the memorandum from the Office of Accountability entitled " 2019-20 Accountability Implications to Address the COVID-19 Crisis."

Use your own professional judgement on what to include in your budget backup information

180 Day Calendar **Update**



11

There are ***less Regents this June*** so you will need to have regular session days to count the hours and/or days previously planned for Regents Days towards the 180-day calendar

FROM: Phyllis D. Morris, Chief Financial Officer

RE: Impact of Revised Regents Examination Schedule on Hourly Instructional Requirements and 180 Session Day Requirements

This provision allows districts and charter schools to count the average number of instructional hours towards the minimum instructional hour requirement for days on which, pursuant to the Regents Examination schedule, the school is conducting a Regents Examination or locally-developed Checkpoint A or B World Language Examination, and for the Rating Day. With the cancellation of many of the Regents Examinations originally planned for administration in June 2021, the [schedule for the updated June 2021 Regents Examination period](#) now includes fewer days during the 2020-21 school year on which Regents Examinations will be held. Regents Examinations will no longer be administered on June 15 or June 16 of 2021.

A Regents Exam day only counts as a session day if an exam is held on that day in the school. Because Regents Examinations are no longer scheduled for June 15 or June 16 of 2021, June 15 and 16 may no longer be considered Regents Exam days. Therefore, schools must provide instruction on June 15 and 16 to count these days towards days of session. June 21 may only be counted as a Regents Day if the school is administering locally-developed Checkpoint A or B World Language Exam(s) to its students on this day. If not, the school must provide instruction on June 21 for this day to be counted as a session day.



Claims Verification Project

12

- SED recently sent notifications to districts about Claims Verification Project for 20-21:

The screenshot displays the SAMS system interface with a navigation bar at the top containing tabs: Entity Info, Forms, Claim Verifications, Activity Log, and Reports. The 'Claim Verifications' tab is selected, showing a sub-menu with 'Claim Verification Project List' and 'Claim Verification Activity Log'. Below the navigation bar, there are links for 'Expand All' and 'Collapse All'. A tree view under 'Core Forms' lists various forms and their status, such as 'Form A and Schedules: Clean', '180 Days Calendar: Certified', 'Form FB : Building And Misc.: Clean', 'Form FT : Transportation: Clean', 'Form BP : Bus Purchase:', 'ST-3 Forms and Schedules (Financial): Clean', 'RSU Forms and Schedules: Clean', 'CPSE Administrative Forms and Schedules Clean', 'Schedule F6 : Bus Amortization: Clean', 'Administrative Compensation Information: Clean', 'Property Tax Report Card:', and 'NYSED Only Form Set:'.

| Entity Info | Forms | Claim Verifications | Activity Log | Reports |
|--|-------|---------------------|--------------|---------|
| Claim Verification Project List | | | | |
| Claim Verification Activity Log | | | | |
| Expand All Collapse All | | | | |
| Core Forms | | | | |
| + Form A and Schedules: Clean | | | | |
| + 180 Days Calendar: Certified | | | | |
| + Form FB : Building And Misc.: Clean | | | | |
| + Form FT : Transportation: Clean | | | | |
| + Form BP : Bus Purchase: | | | | |
| + ST-3 Forms and Schedules (Financial): Clean | | | | |
| + RSU Forms and Schedules: Clean | | | | |
| + CPSE Administrative Forms and Schedules Clean | | | | |
| + Schedule F6 : Bus Amortization: Clean | | | | |
| + Administrative Compensation Information: Clean | | | | |
| + Property Tax Report Card: | | | | |
| + NYSED Only Form Set: | | | | |

You can see it here
in SAMS

Claims Verification Project

13

- SED picks different areas each year and reviews what was submitted/reported in more detail for a sample of the districts
- This year, the areas being checked are:

| Claim Verification Project List | | |
|---|---|---------------------------|
| Project Name | Project Description | District Action Required? |
| SAMS Summer Transportation Expense for Certain Special Education Programs | All or part of summer special education transportation expenditures are missing from the 2020-21 SAMS ST-3 Special Aid Fund Schedule B3 | NO |
| Schedule G, H, and I Claim Verification | Revision of Miscellaneous Expenditures Incorrectly Claimed on Schedule G, H, and I | YES |
| Schedule J Transportation Contracts Claim Verification | Revision of Transportation Contracts Incorrectly Claimed on Schedule J | NO |

← If you see “YES” they have picked you for this review

Steps to Follow for Claims Verification Project

14

- ❑ Read the correspondence sent to the State Aid Designee
- ❑ Determine if your district has been selected for any area(s) for review (denoted by “YES” next to area)
- ❑ If selected, acknowledge the verification project, as instructed
- ❑ Review their questions and follow their directions by the deadline provided
 - ▣ Provide additional support for items questioned *and/or*
 - ▣ Make corrections noted
 - In Revision section of ST-3
 - Remember to transmit it too
- ❑ Ignoring the project will result in follow up emails to you and then you and the Superintendent

Additional Issues with Areas Selected this Year

15



| Project Name | Project Description |
|--|---|
| <u>SAMS Summer Transportation Expense for Certain Special Education Programs</u> | All or part of summer special education transportation expenditures are missing from the 2020-21 SAMS ST-3 Special Aid Fund Schedule B3 |
| <u>Schedule G, H, and I Claim Verification</u> | Revision of Miscellaneous Expenditures Incorrectly Claimed on Schedule G, H, and I |
| <u>Schedule J Transportation Contracts Claim Verification</u> | Revision of Transportation Contracts Incorrectly Claimed on Schedule J |

They are questioning certain expenditures claimed – provide further explanation or remove from Schedule as not aidable

Many districts charged the Summer 4408 transportation contracts to the General Fund and reported them on Schedule J

Instructions say to remove from Schedule J and also to move expenses from the General Fund to the Special Aid Fund



Recommend you also speak with your external auditor as the books for 6/30/20 are closed and have been audited with those expenses in the wrong fund.

OSC Audit for School District Website Transparency

16

- ❑ OSC recently issued audit (2021-MS-1)
- ❑ Focus was on whether districts provided Financial Information to the Public that was:
 - ❑ Transparent
 - ❑ Comprehensive
- ❑ They looked at both items that are “Required Postings” mandated to be on a district’s website as well as ones they deemed “Best Practices” to be on a district’s website

Required Postings

17

- ❑ Original, Adopted Budget
- ❑ Final Annual Budget
- ❑ External Audit
 - ❑ Report
 - ❑ Corrective Action Plan
- ❑ OSC Audit
 - ❑ Report
 - ❑ Corrective Action Plan
- ❑ Board Adopted Multi-year Financial Plan

Should be both
Transparent and
Comprehensive

Best Practice Postings

18

- ❑ Not Board Adopted Multi-year Financial Plan
- ❑ Budget-to-Actual Information
- ❑ Internal Audit
 - ❑ Report
 - ❑ Corrective Action Plan



- ❑ Audit report is available here:
 - ❑ [School District Website Transparency \(2021-MS-1\)](#)
[| Office of the New York State Comptroller](#)

OSC Recommendations

19

The Board:

1. Must ensure a comprehensive original board-adopted budget posted to the website includes appended information, as required.
2. Should post to the website or provide further transparency by posting comprehensive budget-to-actual results in a website location easy to access by the public.
3. Must ensure that the final annual budget is posted as required to the website and should ensure the document is comprehensive.

OSC Recommendations (con't)

20

4. Must post a board-adopted comprehensive multi-year financial plan, or should prepare, adopt, and post a comprehensive multi-year financial plan to the website to help residents, taxpayers and the public see the impact of fiscal decisions.
5. Must post external audit reports and CAPs to the website, and should post all external and internal audit reports and CAPs in a transparent location.

My Recommendations

21

- Read the OSC audit report and evaluate the recommendations for your district.

- Check your website and see which of the documents your district has posted.

- ☐ Are they up-to-date?
- ☐ Add, at a minimum, those that are mandated.

- Go to the website of some neighboring districts and see where they post the information.

See any good ideas for better transparency that your district can copy?





22

Digging into Transportation Aid for Bus Purchases

What a SBO May Need to Know

Transportation Aid

23

- Link to list of what is aidable:
https://stateaid.nysed.gov/trans/aidable_nonaidable_list.htm
- Buses used to transport children to and from school generate Transportation Aid
- Aid is based on the assumed amortization of the debt service
 - ▣ Regardless if you purchased with cash or financed
- Aid is paid over 5 years
 - ▣ Can start the year after the purchase
 - ▣ Get full year aid in first year, if order before 12/31
 - ▣ Get ½ year aid in first year, if order after 1/1
 - Rest paid in 6th year

Claiming Aid for Bus Purchase

24

Expand All | Collapse All

In SAMS

Core Forms

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

- Information on bus purchase is entered into Form BP
- Superintendent needs to certify claim

Information Needed for Each New Bus

25

Bus Purchase Approval

Form BP - Bus Purchase Claim Data 2020-21 Claim Year

BUS INFORMATION

| | |
|---|--|
| 1. District assigned Bus Number | <input type="text" value="0059"/> |
| 2. Vehicle Identification Number | <input type="text" value="4DRBUPWN3MB437411"/> |
| 3. Model Year | <input type="text" value="2021"/> |
| 4. Pupil Capacity | <input type="text" value="65"/> |
| <small>Note: If the capacity of the bus you purchased is lower than the rated capacity of the bus, enter the rated capacity. An example of this would be a bus that had a rated capacity of 84 passengers, but the district purchased the bus with a capacity of only 72 to allow additional leg room. The capacity of 84 must be entered in the capacity field.</small> | |
| 5. Chassis Type | <input type="text" value="Bus [Medium Duty Bus]"/> |
| 6. Engine Classification | <input type="text" value="CN [Conventional]"/> |
| 7. Fuel Type | <input type="text" value="G [Gasoline]"/> |
| 8. If you selected 'Other' to entry 7 above, then select the appropriate fuel type | <input type="text" value="NA [Not Applicable]"/> |
| 9. Number of Wheel Chair Lifts | <input type="text" value="0"/> |
| 10. Number of Wheel Chair Stations | <input type="text" value="0"/> |

PURCHASE INFORMATION

| | |
|--|--|
| 11. How was the bus purchased? | <input type="text" value="State Contract"/> |
| 12. If you selected 'State Contract' to entry 11 above, then enter the Contract Year, Group Number, Award Number, Vendor Name and Vendor Discount below: | |
| Contract Year | <input type="text" value="2016"/> |
| Group Number | <input type="text" value="40524"/> |
| Award Number | <input type="text" value="23000"/> |
| Vendor Name | <input type="text" value="Leonard Bus Sales"/> |
| If you selected 'Other' for Vendor Name, then please enter your vendor name | |
| <input type="text"/> | |
| Vendor Discount Applied To Options | <input type="text" value="16.00"/> % |

Bus #59

Information
should be
available
from invoice
and
purchasing
documents

Information Needed for Each New Bus

26

| | |
|---|----------------|
| 13. Was the vehicle purchased used? | No |
| 14. Will this vehicle be used for any purpose other than transporting students? | No |
| 15. If you selected 'Yes' in entry 14 above, please describe other vehicle usage | |
| 16. Was a BAN or BOND used to finance this purchase? | Yes |
| 17. Purchase Order Date | 07/24/2020 |
| 18. Was this vehicle purchased as an emergency replacement? Note: Failure to meet NYS DOT inspection is not a valid justification for emergency purchase. | No |
| 19. Type of Emergency Provide Detailed explanation for "Type of Emergency" noted above | Not Applicable |
| 20. Date the Board Resolution was passed for the emergency bus purchase | |

Financing
information

COST INFORMATION

| | |
|--|------------|
| 21. Gross Cost (Including options and after all discounts) rounded to the nearest dollar | \$ 115554 |
| 21A. Maximum Allowable Price (SED ONLY) | \$ N/A |
| 21B. Override Price (SED ONLY) | \$ |
| 22. Trade-In Allowances rounded to the nearest dollar | \$ 3500 |
| 23. Federal or State Grants rounded to the nearest dollar | \$ 0 |
| 24. Net Purchase Price of the new bus | \$ 112054 |
| 25. Approved Cost for aid | \$ 112054 |
| 26. Certified Date | 08/31/2020 |



Bus Comments

08/20/2020- REUSED BUS NUMBER

Superintendent's Certification

27

You have read-only access to this form at this time. Do not attempt to save any data.

Bus Purchase Certification Form

This certification form must be completed using the State Aid Management System. In accordance with the Electronic Signatures and Record Act (ESRA), an electronic signature is an electronic sound, symbol or process, attached to or logically associated with an electronic record and executed and or adopted by a person with the intent to sign the record. An electronic signature is considered to be attached to or logically associated with an electronic recording if the electronic signature is linked to the record during the transmission and storage. Therefore, when clicking on the Certify button below, such process shall be considered the electronic signature of the Superintendent of Schools or in the case of a city school district with a population of one million or more, the electronic signature of the Chancellor.

AFFIDAVIT OF SUPERINTENDENT OR CHANCELLOR

I, undersigned Superintendent of Schools, or the Chancellor, of this school district for which the following report is made, do attest that to the best of my knowledge, information, and belief:

1. The data entered in this Bus Purchase Approval Form are accurate and complete;
2. The data entered was visually compared with data from the Purchase Order, Itemized Options statements and Invoice and deemed to be correct;
3. If not purchased under the State Contract, the bus described was duly advertised and bid in accordance with the provisions of General Municipal Law (Sections 103 and 119);
4. The bus was purchased with valid voter approval or a valid board resolution (for city school districts or emergency bus purchase);
5. The bus described in this form meets the requirements and regulations of the New York State Department of Transportation and has been inspected and approved by the Department of Transportation for use in transporting pupils; and
6. The district will maintain for such time as required by law or regulation, and will make available upon SED request for claim verification, the records and documentation related to this bus purchase that substantiate the attestations made in items #1 through #5 above.

| Bus Number | Vin Number | Gross Cost | PO Date | Status | Status Date | Approved Cost For Aid |
|---|------------|------------|---------|--------|-------------|-----------------------|
| Currently CSD Does Not Have Any Bus Purchase Records Ready To Be Certified For 2020-2021. | | | | | | |



Summary of Bus Purchase Approvals

28

Bus Purchase Approval Data

Note: Click On A Bus Number Below To View The Bus Form. To View All Bus Form Data For All Buses With An Aid Start Year Of 2017-2018 Or Later, Select "Reports" From The Main Menu, Then Bus Purchase Reports → Bus Detail Report.

| Bus Number | Vin Number | Gross Cost | PO Date | Status | Status Date | Approved Cost For Aid | Certified Date | READY? <input type="checkbox"/> (ALL) |
|----------------------|-------------------|------------|------------|--------|-------------|-----------------------|----------------|--|
| 0036 | 1HA3GRBG1HN002938 | 51720 | 07/24/2018 | CERT | 09/05/2019 | 50520 | 08/20/2018 | |
| 0037 | 4DRBUPWN2KB639394 | 109889 | 07/24/2018 | CERT | 09/05/2019 | 108089 | 08/20/2018 | |
| 0038 | 4DRBUPWN4KB639395 | 109889 | 07/24/2018 | CERT | 09/05/2019 | 108089 | 08/20/2018 | |
| 0039 | 4DRBUPWN6KB639396 | 109889 | 07/24/2018 | CERT | 09/05/2019 | 108089 | 08/20/2018 | |
| 0040 | 4DRBUPWN8KB639397 | 109889 | 07/24/2018 | CERT | 09/05/2019 | 107089 | 08/20/2018 | |
| 0041 | 4DRBUPWNXKB639398 | 109889 | 07/24/2018 | CERT | 09/05/2019 | 107089 | 08/20/2018 | |
| 0042 | 4DRBUPWN1KB639399 | 109889 | 07/24/2018 | CERT | 09/05/2019 | 105089 | 08/20/2018 | |
| 0043 | 2C4RDGBG3JR363821 | 23424 | 08/16/2018 | CERT | 09/05/2019 | 23424 | 08/14/2019 | |
| 0044 | 1GB3GRBG4K1147172 | 53204 | 07/24/2019 | CERT | 09/05/2019 | 52004 | 08/14/2019 | |
| 0045 | 4DRBUPWN7LB849507 | 112795 | 07/24/2019 | CERT | 09/05/2019 | 110995 | 08/14/2019 | |
| 0046 | 4DRBUPWN9LB849508 | 112795 | 07/24/2019 | CERT | 09/05/2019 | 110995 | 08/14/2019 | |
| 0047 | 4DRBUPWN0LB849509 | 112795 | 07/24/2019 | CERT | 09/05/2019 | 109795 | 08/14/2019 | |
| 0048 | 4DRBUPWN7LB849510 | 112795 | 07/24/2019 | CERT | 09/05/2019 | 109795 | 08/14/2019 | |
| 0049 | 4DRBUPWN9LB849511 | 112795 | 07/24/2019 | CERT | 09/05/2019 | 109795 | 08/14/2019 | |
| 0050 | 4DRBUPWN0LB849512 | 112795 | 07/24/2019 | CERT | 09/05/2019 | 109795 | 08/14/2019 | |
| 0051 | 1GB3GRBG8K1145425 | 61694 | 07/24/2019 | CERT | 09/05/2019 | 60194 | 08/14/2019 | |
| 0052 | 1HA3GRBG6LN004239 | 66132 | 07/24/2020 | CERT | 08/31/2020 | 65632 | 08/31/2020 | |
| 0053 | 1GB3GRBG7L1177932 | 66132 | 07/24/2020 | CERT | 08/31/2020 | 65632 | 08/31/2020 | |
| 0054 | 1HA3GRBG5LN003924 | 57553 | 07/24/2020 | CERT | 08/31/2020 | 56553 | 08/31/2020 | |
| 0055 | 1HA3GRBG4LN004191 | 57553 | 07/24/2020 | CERT | 08/31/2020 | 56553 | 08/31/2020 | |
| 0056 | 4DRBUPWN3MB437408 | 115554 | 07/24/2020 | CERT | 08/31/2020 | 114554 | 08/31/2020 | |
| 0057 | 4DRBUPWN5MB437409 | 115554 | 07/24/2020 | CERT | 08/31/2020 | 112054 | 08/31/2020 | |
| 0058 | 4DRBUPWN1MB437410 | 115554 | 07/24/2020 | CERT | 08/31/2020 | 112054 | 08/31/2020 | |
| 0059 | 4DRBUPWN3MB437411 | 115554 | 07/24/2020 | CERT | 08/31/2020 | 112054 | 08/31/2020 | |

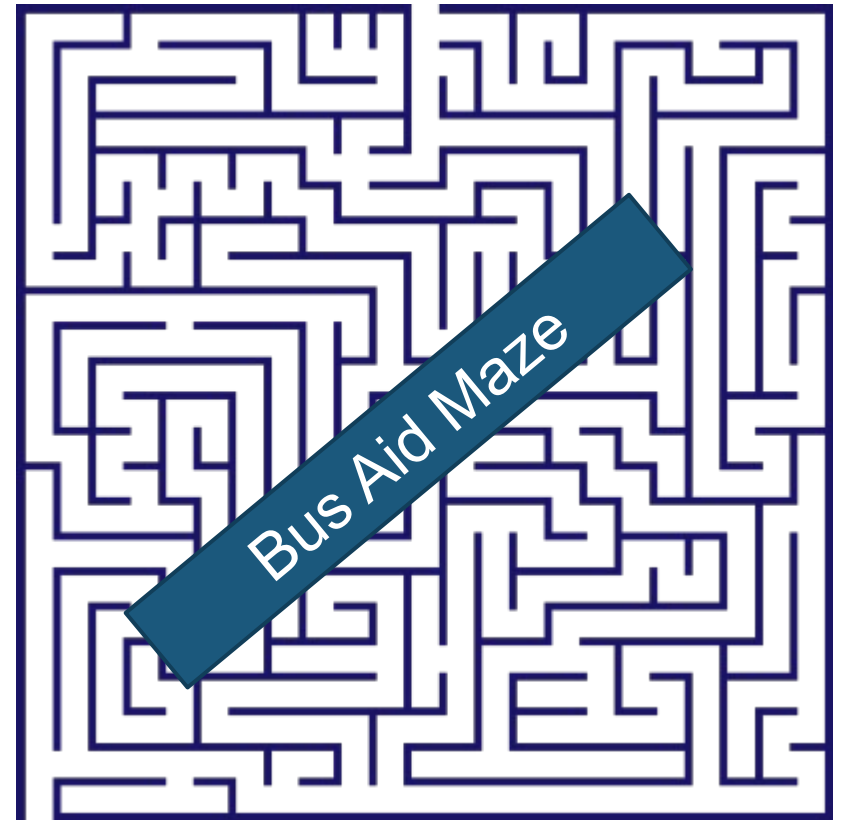
Tip:

Double check to see that Superintendent's attempt to certify claim worked

Am I Done?

29

- ❑ Not if you want accurate projections, tax cap deductions, piece of mind.....
- ❑ Other Related Areas:
 - ▣ TRA output report
 - ▣ Bus Purchase reports in SAMS
 - ▣ TRA-EST Output report
 - ▣ Form FT Lines 164-165



TRA Report for 2020-21

30

ASSUMED AIDABLE DEBT SERVICE FOR TRANSPORTATION CAPITAL AID

| | | | |
|----|--|--|---------|
| 39 | 2020-21 ASSUMED DEBT SERVICE FOR EQUIPMENT EXPENSE INCURRED BETWEEN 7/1/2015 AND 6/30/2019 | (AMORTIZED 1617, 1718, 1819, AND 1920 SAMS SCH G ENT 48) | 30,422 |
| 40 | 2020-21 ASSUMED DEBT SERVICE FOR EQUIPMENT EXPENSE INCURRED BETWEEN 7/1/2019 AND 6/30/2020 | (AMORTIZED 2021 SAMS SCH G ENT 48) | 0 |
| 41 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUSES PURCHASED BETWEEN 1/1/2015 AND 6/30/2019 | (SA-16) | 617,606 |
| 42 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUSES PURCHASED BETWEEN 7/1/2019 AND 6/30/2020 | (SA-16 & SAMS BP FORM) | 162,764 |
| 43 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUS LEASES AND GARAGE RENTAL AGREEMENTS STARTING BETWEEN 1/1/2015 AND 6/30/2019 | (EDUCATIONAL MANAGEMENT SERVICES) | 0 |
| 44 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUS LEASES AND GARAGE RENTAL AGREEMENTS STARTING BETWEEN 7/1/2019 AND 6/30/2020 | (EDUCATIONAL MANAGEMENT SERVICES) | 0 |

Q: What's a SA-16?

A: How buses were claimed for aid in the past (manual process). Form BP replaced process.

Q: How does this amount tie into what was entered on Form BP?

A: SED adds assumed interest and divides over 5 years

Bus Purchase Reports in SAMS

31

Entity Name

BEDS Code

Claim Year

SAMS
NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM

Welcome (School Entity User) CORE 04/01/2021 09:43 AM Home | Issue Reporting | Help | Logout

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

- Output Reports
- Bus Purchase Reports >

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Revision Data:
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Bus Purchase Reports:
[Buses Generating Aid on TRA Output Report](#)
[Buses Projecting Aid on TRA EST Output Report](#)
[Bus Detail Report](#)

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Assumed Amortization of Buses Generating Aid in 2020-21

32

ASSUMED AMORTIZATION DETAILS FOR ALL APPROVED BUSES GENERATING AID IN 2020-21

| Bus Number | Purchase Order Date | Approved Cost for Aid | 1st Year of Aid | Assumed Semi-Annual Payment | 2020-21 Assumed Aidable Debt Service | 2021-22 Assumed Aidable Debt Service | 2022-23 Assumed Aidable Debt Service | 2023-24 Assumed Aidable Debt Service | 2024-25 Assumed Aidable Debt Service | 2025-26 Assumed Aidable Debt Service |
|------------|---------------------|-----------------------|-----------------|-----------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| 0028 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 22874 | 0 | 0 | 0 |
| 0029 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 22874 | 0 | | |
| 0030 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 22874 | 0 | | |
| 0031 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 22874 | 0 | | |
| 0032 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 22874 | 0 | | |
| 0033 | 07/11/2017 | 107919 | 2018-2019 | 11394 | 22788 | 22788 | 22788 | 0 | | |
| 0034 | 07/11/2017 | 58849 | 2018-2019 | 6213 | 12426 | 12426 | 12426 | 0 | | |
| 0035 | 07/11/2017 | 58849 | 2018-2019 | 6213 | 12426 | 12426 | 12426 | 0 | | |
| 0036 | 07/24/2018 | 50520 | 2019-2020 | 5316 | 10632 | 10632 | 10632 | 10632 | | |
| 0037 | 07/24/2018 | 108089 | 2019-2020 | 11374 | 22748 | 22748 | 22748 | 22748 | | |
| 0038 | 07/24/2018 | 108089 | 2019-2020 | 11374 | 22748 | 22748 | 22748 | 22748 | 0 | 0 |
| 0039 | 07/24/2018 | 108089 | 2019-2020 | 11374 | 22748 | 22748 | 22748 | 22748 | 0 | 0 |
| 0040 | 07/24/2018 | 107089 | 2019-2020 | 11269 | 22538 | 22538 | 22538 | 22538 | 0 | 0 |
| 0041 | 07/24/2018 | 107089 | 2019-2020 | 11269 | 22538 | 22538 | 22538 | 22538 | 0 | 0 |
| 0042 | 07/24/2018 | 105089 | 2019-2020 | 11058 | 22116 | 22116 | 22116 | 22116 | 0 | 0 |
| 0043 | 08/16/2018 | 23424 | 2019-2020 | 2465 | 4930 | 4930 | 4930 | 4930 | 0 | 0 |
| 0044 | 07/24/2019 | 52004 | 2020-2021 | 5472 | 10944 | 10944 | 10944 | 10944 | 10944 | 0 |
| 0045 | 07/24/2019 | 110995 | 2020-2021 | 11680 | 23360 | 23360 | 23360 | 23360 | 23360 | 0 |
| 0046 | 07/24/2019 | 110995 | 2020-2021 | 11680 | 23360 | 23360 | 23360 | 23360 | 23360 | 0 |
| 0047 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 23108 | 0 |
| 0048 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 23108 | 0 |
| 0049 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 23108 | 0 |
| 0050 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 23108 | 0 |
| 0051 | 07/24/2019 | 60194 | 2020-2021 | 6334 | 12668 | 12668 | 12668 | 12668 | 12668 | 0 |
| 0125 | 04/17/2013 | 38299 | 2016-2017 | 3990 | 7980 | 0 | 0 | 0 | 0 | 0 |

Tip: While you are here, check to see if all buses have been claimed for aid (normally in numerical order)

= \$162,764

TRA Report for 2020-21

33

ASSUMED AIDABLE DEBT SERVICE FOR TRANSPORTATION CAPITAL AID

| | | | |
|----|--|--|---------|
| 39 | 2020-21 ASSUMED DEBT SERVICE FOR EQUIPMENT EXPENSE INCURRED BETWEEN 7/1/2015 AND 6/30/2019 | (AMORTIZED 1617, 1718, 1819, AND 1920 SAMS SCH G ENT 48) | 30,422 |
| 40 | 2020-21 ASSUMED DEBT SERVICE FOR EQUIPMENT EXPENSE INCURRED BETWEEN 7/1/2019 AND 6/30/2020 | (AMORTIZED 2021 SAMS SCH G ENT 48) | 0 |
| 41 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUSES PURCHASED BETWEEN 1/1/2015 AND 6/30/2019 | (SA-16) | 617,606 |
| 42 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUSES PURCHASED BETWEEN 7/1/2019 AND 6/30/2020 | (SA-16 & SAMS BP FORM) | 162,764 |
| 43 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUS LEASES AND GARAGE RENTAL AGREEMENTS STARTING BETWEEN 1/1/2015 AND 6/30/2019 | (EDUCATIONAL MANAGEMENT SERVICES) | 0 |
| 44 | 2020-21 ASSUMED DEBT SERVICE FOR COST OF BUS LEASES AND GARAGE RENTAL AGREEMENTS STARTING BETWEEN 7/1/2019 AND 6/30/2020 | (EDUCATIONAL MANAGEMENT SERVICES) | 0 |

Buses Projecting Aid on TRA EST Output Report

34



ESTIMATED ASSUMED AMORTIZATION DETAILS FOR ALL APPROVED BUSES PROJECTING AID IN 2021-22

| Bus Number | Purchase Order Date | Approved Cost for Aid | 1st Year of Aid | Assumed Semi-Annual Payment | 2021-22 Assumed Aidable Debt Service | 2022-23 Assumed Aidable Debt Service | 2023-24 Assumed Aidable Debt Service | 2024-25 Assumed Aidable Debt Service | 2025-26 Assumed Aidable Debt Service | 2026-27 Assumed Aidable Debt Service |
|------------|---------------------|-----------------------|-----------------|-----------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| 0028 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 0 | 0 | 0 | 0 |
| 0029 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 0 | 0 | 0 | 0 |
| 0030 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 0 | 0 | 0 | 0 |
| 0031 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 0 | 0 | 0 | 0 |
| 0032 | 07/11/2017 | 108319 | 2018-2019 | 11437 | 22874 | 22874 | 0 | 0 | 0 | 0 |
| 0033 | 07/11/2017 | 107919 | 2018-2019 | 11394 | 22788 | 22788 | 0 | 0 | 0 | 0 |
| 0034 | 07/11/2017 | 58849 | 2018-2019 | 6213 | 12426 | 12426 | 0 | 0 | 0 | 0 |
| 0035 | 07/11/2017 | 58849 | 2018-2019 | 6213 | 12426 | 12426 | 0 | 0 | 0 | 0 |
| 0036 | 07/24/2018 | 50520 | 2019-2020 | 5316 | 10632 | 10632 | 10632 | 0 | 0 | 0 |
| 0037 | 07/24/2018 | 108089 | 2019-2020 | 11374 | 22748 | 22748 | 22748 | 0 | 0 | 0 |
| 0038 | 07/24/2018 | 108089 | 2019-2020 | 11374 | 22748 | 22748 | 22748 | 0 | 0 | 0 |
| 0039 | 07/24/2018 | 108089 | 2019-2020 | 11374 | 22748 | 22748 | 22748 | 0 | 0 | 0 |
| 0040 | 07/24/2018 | 107089 | 2019-2020 | 11269 | 22538 | 22538 | 22538 | 0 | 0 | 0 |
| 0041 | 07/24/2018 | 107089 | 2019-2020 | 11269 | 22538 | 22538 | 22538 | 0 | 0 | 0 |
| 0042 | 07/24/2018 | 105089 | 2019-2020 | 11058 | 22116 | 22116 | 22116 | 0 | 0 | 0 |
| 0043 | 08/16/2018 | 23424 | 2019-2020 | 2465 | 4930 | 4930 | 4930 | 0 | 0 | 0 |
| 0044 | 07/24/2019 | 52004 | 2020-2021 | 5472 | 10944 | 10944 | 10944 | 10944 | 0 | 0 |
| 0045 | 07/24/2019 | 110995 | 2020-2021 | 11680 | 23360 | 23360 | 23360 | 23360 | 0 | 0 |
| 0046 | 07/24/2019 | 110995 | 2020-2021 | 11680 | 23360 | 23360 | 23360 | 23360 | 0 | 0 |
| 0047 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 0 | 0 |
| 0048 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 0 | 0 |
| 0049 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 0 | 0 |
| 0050 | 07/24/2019 | 109795 | 2020-2021 | 11554 | 23108 | 23108 | 23108 | 23108 | 0 | 0 |
| 0051 | 07/24/2019 | 60194 | 2020-2021 | 6334 | 12668 | 12668 | 12668 | 12668 | 0 | 0 |
| Z020 | 06/28/2016 | 108499 | 2016-2017 | 11302 | 11302 | 0 | 0 | 0 | 0 | 0 |
| Z021 | 06/28/2016 | 108499 | 2016-2017 | 11302 | 11302 | 0 | 0 | 0 | 0 | 0 |
| Z022 | 06/28/2016 | 108499 | 2016-2017 | 11302 | 11302 | 0 | 0 | 0 | 0 | 0 |
| Z023 | 06/28/2016 | 108499 | 2016-2017 | 11302 | 11302 | 0 | 0 | 0 | 0 | 0 |
| Z024 | 06/28/2016 | 108499 | 2016-2017 | 11302 | 11302 | 0 | 0 | 0 | 0 | 0 |
| Z025 | 06/28/2016 | 108499 | 2016-2017 | 11302 | 11302 | 0 | 0 | 0 | 0 | 0 |
| Z026 | 06/28/2016 | 46693 | 2016-2017 | 4864 | 4864 | 0 | 0 | 0 | 0 | 0 |
| Z027 | 06/28/2016 | 47093 | 2016-2017 | 4906 | 4906 | 0 | 0 | 0 | 0 | 0 |

Export This Data To CSV

Wait! We entered all the new buses in Form BP, had the Superintendent certify them, and verified everything worked.

Aid should flow in 21-22.

But where is Bus 59 or any of the buses purchased in 20-21???

TRA-EST for 2021-22

35

CAPITAL EXPENDITURES (BUS PURCHASE, LEASE AND EQUIPMENT)

| | | | |
|----|--|--|---------|
| 13 | NOT USED | | |
| 14 | NOT USED | | |
| 15 | NOT USED | | |
| 16 | NOT USED | | |
| 17 | NOT USED | | |
| 18 | NOT USED | | |
| 19 | 2021-22 ASSUMED DEBT SERVICE FOR COST OF BUSES PURCHASED BETWEEN 1/1/2016 AND 6/30/2020 | (SA-16 & SAMS BP FORM) | 553,354 |
| 20 | 2021-22 ASSUMED DEBT SERVICE FOR COST OF BUSES PURCHASED BETWEEN 7/1/2020 AND 6/30/2021 | (AMORTIZED FORM FT ENTS (164 + 165)) | 146,290 |
| 21 | 2021-22 ASSUMED DEBT SERVICE FOR COST OF BUS LEASES AND GARAGE RENTAL AGREEMENTS STARTING BETWEEN 1/1/2016 AND 6/30/2020 | (OMS) | 0 |
| 22 | 2021-22 ASSUMED DEBT SERVICE FOR COST OF BUS LEASES AND GARAGE RENTAL AGREEMENTS STARTING BETWEEN 7/1/2020 AND 6/30/2021 | (AMORTIZED FORM FT ENTS 166, 167) | 0 |
| 23 | 2021-22 ASSUMED DEBT SERVICE FOR EQUIPMENT EXPENSE INCURRED BETWEEN 7/1/2016 AND 6/30/2020 | (AMORTIZED 1718, 1819, 1920 AND 2021 EQUIPMENT ENTS 182) | 30,422 |
| 24 | 2021-22 ASSUMED DEBT SERVICE FOR COST OF BUS PURCHASES AND LEASES STARTING BETWEEN 7/1/2020 AND 6/30/2021 | | 0 |



TRA-EST projects what Transportation aid will be for the following year

So **new purchases** are not included on the previous report. (Show up the following year.)

Let's next look at Form FT.

Form FT – Report Projected Expenditures

36

Form FT: Transportation Data

Form FT - Transportation Data 2020-21 Claim Year

2018-19 School Year
SED File (Prior)

2019-20 School Year
EDP Form #10
(Actual)

2020-21 School Year
EDP Form #38
(Projected)



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.

695,086

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.

So, if don't fill in here,
even if do Form BP,
no aid will be projected
for the next year

For September 2nd, you project the cost of buses that you plan to purchase during the current year

Line 164 – Dollar amount that you plan to order 7/1-12/31

Line 165 – Dollar amount that you plan to order 1/1-6/30

Not amount you plan on financing – Should be the *estimated cost of the buses*

What if I Put Estimated Costs in Column 3 of the ST-3 Instead?

37

Schedule A4c - General Fund Expenditures by Function and Object of Expense 299-436

| ST3 - Annual Financial Report | | 2018-19 School Year from SED File | 2019-20 School Year (Actual) DP #49 | 2020-21 School Year (Projected) DP #49 |
|--|----------|--------------------------------------|--|---|
| PUPIL TRANSPORTATION | | | | |
| District Transportation Services | | | | |
| 299. Instructional Salaries (Trans Supervisor Office) | A5510.15 | | | |
| 300. Noninstructional Salaries (Excl Trans Supv Office) | A5510.16 | 2,145,910 | 2,138,918 | 2,376,540 |
| 301. Noninstructional Salaries (Trans Supervisor Office) | A5510.16 | 141,500 | 168,993 | 166,160 |
| 302. Equipment | A5510.2 | 109,422 | | |
| 303. Purchase of Buses | A5510.21 | | | |
| 304. Contractual and Other | A5510.4 | 142,998 | 153,478 | 149,239 |
| 305. Materials and Supplies | A5510.45 | 428,766 | 340,873 | 497,775 |
| 306. BOCES Bus Driver Training Services | A5510.49 | | | |
| 307. BOCES Bus Maintenance Services | A5510.49 | | | |
| 308. Total District Transportation Services | A5510.0 | 2,968,596 | 2,802,269 | |
| Garage Building | | | | |
| 309. Noninstructional Salaries | A5530.16 | 8,897 | 7,523 | |
| 310. Equipment | A5530.2 | | | |
| 311. Contractual and Other | A5530.4 | 105,254 | 66,631 | |
| 312. Materials and Supplies | A5530.45 | 2,785 | 4,285 | |
| 313. Total Garage Building | A5530.0 | 116,936 | 78,439 | |
| 314. NOT USED | | | | |
| 315. Contract Transportation | A5540.4 | 3,769 | 0 | |
| 316. Public Transportation | A5550.4 | | | |
| 317. Transportation from BOCES | A5581.49 | | | |
| 318. TOTAL PUPIL TRANSPORTATION | AT5599.0 | 3,089,301 | 2,880,701 | 3,267,601 |

For State Aid
purposes:

They don't look
here. Must be on
Form FT for
projections.

Aid for Bus Purchases



38

Important to:

- ❑ Complete Form FT at the beginning of the year with projected expenditures
- ❑ Complete Form BP when bus purchased
- ❑ Check information is certified
- ❑ Check TRA report for reasonableness
- ❑ Check TRA-EST report for reasonableness
 - Also, during Tax Cap preparation make sure it includes the proper expenditures to project the proper aid to be netted from the capital exclusion



Check Your Contacts Now

39

Entity Name

BEDS Code

Claim Year

SAMS

NEW YORK STATE EDUCATION DEPARTMENT
STATE AID MANAGEMENT SYSTEM



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Any of These Positions New?
State Aid Designee
Director of Special Education
Fiscal Advisor
ST-3 Contact
Transportation Contact

This is the source used to send emails out from SED

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Ver 1.8.33

Questions?

40

State Aid and Financial Planning Service

Questar III BOCES
10 Empire State Boulevard
Castleton, NY 12033

518-477-2635

Option 1 (SAP)

<http://sap.questar.org>

twitter.com/qiisap - @qiisap



Upcoming dates:

5/26/21 – June SBO Calendar

6/23/21 – July SBO Calendar