



# Notice



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- 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.....

## Other Webinars

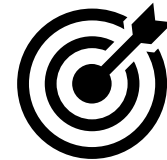
Monthly/Special Webinars focusing on a variety of topics.

### The Knowledge Café

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



PUTTING STUDENTS FIRST



# Knowledge Café for February 2021

Sarah Morrison and Kathy Beardsley  
State Aid Planning

# February Agenda

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- ❑ February SBO Calendar
- ❑ Pension Plans – What Does a SBO Need to Know?
- ❑ Required Reporting of Retiree Earnings
- ❑ What is STAC and How Do I Access It?
- ❑ Questions and Answers



# February SBO Calendar

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Task	Month	Due Date	Filing Requirement	Notes	Priority
Annual ERS Payment due (if early payment option not done in December)	February	2/1/2021	Annually		Required
Complete Surveys 2/3 in the NYSED Portal under Office of Audit Services - Big 5 Districts	February	2/1/2021	Annually	Upload: Financial Statement Board Approval, Management Letter(s), Extra Classroom Audit and/or Corrective Action Plans. Corrective Action Plans (CAP) refers to CAPs for the Financial Statement, Extra Classroom and Management Letter findings (NOT for Single Audit CAP).	Required
1st report of EPE (Employment Preparation Education) contact hours (for 2020-21 aid year).	February	2/1/2021	Annually	Up to 25% of the total appropriation will be paid after April 1 based on these claims. If claims statewide exceed 25%, aid will be prorated. This form is used to determine the EPE hours through December 31, 2020 that will be claimed for EPE aid and to project total EPE hours through June 30, 2021.	Required
Billings (transportation, use of facilities, health services, parentally placed non-public etc.)	February	2/28/2021	Monthly		Recommended Best Practice
Budget Status Reports to Board of Education including revenue and appropriation status reports	February	2/28/2021	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

# February SBO Calendar

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Task	Month	Due Date	Filing Requirement	Notes	Priority
Cash Flow - modify and update	February	2/28/2021	Monthly		Recommended Best Practice
Cash Flow and Fund Balance - review for accuracy	February	2/28/2021	Monthly		Recommended Best Practice
Federal and State Cafeteria Reimbursement Form	February	2/28/2021	Monthly		Recommended Best Practice
File DCERT for any new or continuing 10-month private special education placements	February	2/28/2021	Monthly		Required
Monthly Profit/Loss Statements for School Food Service	February	2/28/2021	Monthly	Perform analysis on prior month's activities	Recommended Best Practice
Payroll Reports – ERS and TRS Payments & Reports	February	2/28/2021	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	February	2/28/2021	Monthly		Recommended Best Practice
Review BOCES invoices for appropriate services and charges	February	2/28/2021	Monthly		Recommended Best Practice
Review outstanding checks	February	2/28/2021	Monthly		Recommended Best Practice
State and Federal Projects - review for expenditures and revenues. Submit FS-25's request for funds to Grants Finance	February	2/28/2021	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
Submit application for approval of bus/vehicle purchase via SAMS immediately following the delivery of any bus/vehicle purchased to transport students. (Form BP)	February	2/28/2021	Monthly	Districts are no longer required to submit paperwork to the State Aid office to support the information on every bus/vehicle purchase. However, districts must keep substantiating documentation available on file for Records Retention and Disposition Schedule ED-1	Recommended Best Practice

# February SBO Calendar

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Task	Month	Due Date	Filing Requirement	Notes	Priority
Treasurer's Report	February	2/28/2021	Monthly	Report on prior month's activities	Recommended Best Practice
Budget Development - Continue	February	2/28/2021	Annually		Recommended Best Practice
Check status of Capital Project Final Cost Reports	February	2/28/2021	Annually		Recommended Best Practice
Check status of current capital projects, prior and prospective projects	February	2/28/2021	Annually	These reports are available by accessing the NYSED District Home Page under section entitled "IMPORTANT INFORMATION ABOUT BUILDING AID"	Recommended Best Practice
Prepare and Submit Property Tax Cap Calculation form on OSC portal	February	2/28/2021	Annually	Due March 1st. Data must be submitted via OSC's online portal	Recommended Best Practice
Prepare claims using SEDCAR-1 Form to receive sub-allocation of IDEA Section 611 and 619 pass-through funds for nonresident students with disabilities (SWD) the school district serves and forward to district of residence.	February	2/28/2021	Annually		Recommended Best Practice
Prepare for Budget Presentation	February	2/28/2021	Annually		Recommended Best Practice
Report, on OSC web-based system, all post retirement compensation paid to retirees of NYS public retirement systems for the prior calendar year. Includes retirees paid as employees, independent contractors or consultants.	February	2/28/2021	Annually	Report may be submitted annually from January through March	Recommended Best Practice

Presentation available at: <https://www.questar.org/services/financial/state-aid-financial-planning/webinars/knowledge-cafe/>

# Pension Systems - TRS

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<https://www.nystrs.org/Employers/Employer-Contribution-Rate>

- TRS – Teachers Retirement System
  - ▣ Instructional staff
  - ▣ Six Tiers – one contribution rate
  - ▣ Annual payment made by SED in three partial payments in Fall following year-end by intercepting State Aid payments in Sept/Oct/Nov

The current rates are as follows:

To be Collected	ECR	Applicable to
Fall 2021	9.53%	2020-21 School Year Salaries
Fall 2020	8.86%	2019-20 School Year Salaries



# Pension Systems - ERS

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- ERS – Employees Retirement System
  - ▣ Non-instructional staff
  - ▣ Six Tiers – different contribution rates
    - Different plan options
    - Significant difference in rates between Tiers
  - ▣ Annual payment made in December 2020 or February 2021 for April 1, 2020-March 31, 2021
  - ▣ Website has been updated:

<https://www.osc.state.ny.us/retirement/employers/partnership/final-rates>



# Sample ERS Invoice

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Office of the State Comptroller  
New York State & Local Retirement System

New York State Comptroller  
Thomas P. DiNapoli



CSD

ERS - 2021 Annual Invoice

Payment of this Invoice must be received by the Retirement System on or before February 01, 2021. If paying the prepay amount, payment must be received on or before December 15, 2020. Unpaid balances accrue interest at the rate of 6.80%. If you have questions, please contact the Employer Information line at 1-866-805-0990 or 518-474-7736. Select #1 from the menu, enter your location code at the prompt and choose the Employer Billing option.

Payment Due  
February 01, 2021

Prepayment Due  
December 15, 2020

Total Amount Due :

\$411,866

\$408,493

Contribution Details						
Tier	Plan ID	Options	Salary	Rate	Regular Pension Contribution**	GTLI
3	A14	41J165 SCHSV	\$139,324	16.20%	\$21,874	\$697
4	A15	41J165 SCHSV	\$1,910,997	16.20%	\$300,027	\$9,555
5	A15	41J165 SCHSV	\$109,873	13.50%	\$14,283	\$549
6	A15	41J100 SCHSV	\$577,030	9.70%	\$53,087	\$2,885
6	A15	41J165 SCHSV	\$91,843	9.70%	\$8,450	\$459
Subtotal:			\$2,829,068		\$397,720	\$14,145

\*\*Regular Pension Bill without GTLI - Uses March 31, 2020 Salaries with Final Rates

2021 Regular Pension Contribution, Including GTLI

\$411,866

Invoice Details

Due  
February 01, 2021  
Payments

divide by  
factor

Pre Pay  
December 15, 2020  
Payments

# ERS Rates

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**Employees' Retirement System**  
**Comparison of Expected Long-Term Rates with Fiscal Year 2021 and 2022 Final Rates**  
 (all rates are expressed as a %)

		2/1/2022 Rates	2/1/2021 Rates	Expected Long-Term Rates	2/1/2022 Rates	2/1/2021 Rates	Expected Long-Term Rates
		Tier 1			Tier 2		
Retirement Plan	Plan ID						
Basic Contributory	71-a	12.2	10.6	8.9	11.3	9.8	8.3
Non-Contributory/Guaranteed	75-c/75-e	22.5	19.4	16.2	20.3	17.5	14.6
Career	75-g	24.0	20.6	17.3	21.9	18.7	15.7
New Career	75-i/75-h	25.0	21.4	18.0	22.8	19.5	16.4
Sheriff & Deputy 25 Year	89-a	28.2	24.3	20.1	26.6	22.8	19.0
Sheriff & Deputy 20 Year	89-b	32.4	27.6	23.1	25.4	22.5	18.2
with Additional 1/60ths	89-b(m)	32.6	27.8	23.3	27.1	23.8	19.3
Detective Investigator 20 Year	89-d	31.9	27.0	22.7	31.7	26.8	22.6
with Additional 1/60ths	89-d(m)	32.0	27.1	22.8	31.8	26.9	22.7
County Law Enforcement	89-e-ts, 89-vr	29.3	24.8	20.9	29.2	24.5	20.8
14B 25 Year Plan	551	26.6	22.8	19.0	26.4	22.5	18.8
25 Year Plan Additional 1/60ths	551e	27.8	24.1	19.8	27.7	23.9	19.8
25 Year Plan Additional 1/60ths All Service	551ee	28.9	25.0	20.6	28.8	24.8	20.5
20 Year Plan	552	32.6	28.1	23.2	32.5	27.9	23.1
20 Year Plan Additional 1/60ths	553	32.6	28.1	23.2	32.5	27.9	23.1
20 Year Plan Additional 1/60ths All Service	553b	33.8	29.2	24.1	33.7	29.0	24.0
25 Yr Add'l 1/60ths Nassau County Ambulance Med Techs, Peace Officers & Fire Marshalls, and Town Of Tonawanda Paramedics	89-sa,89-sp,89-w,89-v	29.7	25.1	21.2	29.8	25.0	21.2
<b>Options (rates are in addition to plan rates)</b>							
5% Increased Take Home Pay	71-a(5)	3.5	3.5	3.5	3.5	3.5	3.5
8% Increased Take Home Pay	71-a(8)	5.6	5.6	5.6	4.9	4.9	4.9
School Service	CCSV/SCHSV	N/A	N/A	N/A	0.1	0.1	0.1
Sick Leave	41-j	0.2	0.2	0.2	0.2	0.2	0.2

# ERS Rates – A14 & A15/41-j and SCHSV

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Tier 4:  
A14/15 = 16.0  
School Service = .1  
Sick Leave = .1  
Total = 16.2%

**Employees' Retirement System**  
Expected Long-Term Rates with Fiscal Year End 2021 and 2022 Final Rates  
(all rates are expressed as a %)

		2/1/2022 Rates	2/1/2021 Rates	Expected Long-Term Rates	2/1/2022 Rates	2/1/2021 Rates	Expected Long-Term Rates
		Tiers 3 & 4			Tier 5		
Retirement Plan	Plan ID						
Article 14 & Article 15	A14 & A15	18.0	16.0	13.0	15.0	13.3	10.9
County Law Enforcement	89-e-ts,603n3,603n4 89-vr,89-sp,603r3,604s4	22.8	18.7	16.3	19.8	16.2	14.2
25 Yr Nassau County Fire Marshalls	89-w	23.3	19.4	16.7	20.4	16.9	14.6
14B 25 Year Plan	551	24.3	20.6	17.3	21.4	18.2	15.3
25 Year Plan Additional 1/60ths	551e	25.5	22.0	18.2	23.0	19.8	16.4
25 Year Plan Additional 1/60ths All Service	551ee	26.5	22.8	18.9	23.9	20.5	17.1
20 Year Plan	552	30.1	25.5	21.4	27.4	23.1	19.6
20 Year Plan Additional 1/60ths	553	30.4	26.1	21.7	28.1	24.0	20.0
20 Year Plan Additional 1/60ths All Service	553b	31.6	27.1	22.5	29.1	24.9	20.8
25 Yr Add'l 1/60ths Nassau Cnty Amb Med Techs	89-sa	24.6	20.7	17.5	22.0	18.5	15.8
25 Yr Add'l 1/60ths Town of Tonawanda Paramedics	89-v	23.6	19.5	16.9	21.1	17.3	15.1
20 Yr Add'l 1/60ths Rockland & Suffolk County Investigators	603or, 604pr, 603qs, 604rs	28.8	23.9	20.5	26.4	21.9	18.8
20 Yr Westchester County Investigators	WCI03, WCI04	29.9	25.2	21.3	27.3	23.0	19.5
Options (rates are in addition to plan rates)							
School Service	CCSV/SCHSV	0.1	0.1	0.1	0.1	0.1	0.1
Sick Leave	41-j	0.2	0.1	0.1	0.2	0.1	0.1
County 75% POD without heart	607-c	1.6	1.9	1.1	1.6	1.9	1.1
County 75% POD with heart	607-c & 607-d	1.8	2.1	1.3	1.8	2.1	1.3
County 75% POD act of a civilian	607-c(f)	0.2	0.2	0.2	0.2	0.2	0.2

# ERS Rates – A15/41-j (some 100 days) and SCHSV

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Tier 6:  
A15 = 9.50  
School Service = .1  
Sick Leave = .1  
Total = 9.70%

**Employees' Retirement System**  
Comparison of Expected Long-Term Rates with Fiscal Year End 2021 and 2022 Final Rates  
(all rates are expressed as a %)

		2/1/2022 Rates	2/1/2021 Rates	Expected Long-Term Rates
<u>Retirement Plan</u>	<u>Plan ID</u>	<b>Tier 6</b>		
Article 14 & Article 15	A14 & A15	10.5	9.5	7.7
County Law Enforcement	89-e-ts, 603h3, 603h4 89-vr, 89-sp, 603r3, 604s4	14.4	11.6	10.4
25 Yr Nassau County Fire Marshalls	89-w	14.9	12.3	10.8
14B 25 Year Plan	551	15.9	13.4	11.4
25 Year Plan Additional 1/60ths	551e	17.5	15.0	12.6
25 Year Plan Additional 1/60ths All Service	551ee	18.2	15.6	13.1
20 Year Plan	552	21.8	18.2	15.6
20 Year Plan Additional 1/60ths	553	22.7	19.4	16.2
20 Year Plan Additional 1/60ths All Service	553b	23.5	20.1	16.8
25 Yr Add'l 1/60ths Nassau Cnty Amb Med Techs	89-sa	16.8	14.0	12.1
25 Yr Add'l 1/60ths Town of Tonawanda Paramedics	89-v	16.0	13.0	11.5
20 Yr Add'l 1/60ths Rockland & Suffolk County Investigators	603or, 604pr, 603qs, 604rs	21.6	17.9	15.4
20 Yr Westchester County Investigators	WCI03, WCI04	22.0	18.5	15.7
<u>Options (rates are in addition to plan rates)</u>				
School Service	CCSV/SCHSV	0.1	0.1	0.1
Sick Leave	41-j	0.2	0.1	0.1
	100 day limit	0.1	0.1	0.1
County 75% POD without heart	607-c	1.5	1.8	1.0
County 75% POD with heart	607-c & 607-d	1.7	2.0	1.2
County 75% POD act of a civilian	607-c(f)	0.2	0.2	0.2

# Average Annual Rate Notice

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## NYSLRS Announces Employer Contribution Rates for Retirement System for 2021-22

September 3, 2020

The New York State and Local Retirement System (NYSLRS) today announced employer contribution rates for the State Fiscal Year 2021-22 **will increase from 14.6 percent to 16.2 percent of payroll** for the Employees' Retirement System (ERS) and from 24.4 percent to 28.3 percent of payroll for the Police and Fire Retirement System (PFRS).

NYSLRS is made up of these two systems, which pay service and disability retirement benefits to public employees and death benefits to their survivors.

"Employer contribution rates have gone down or remained relatively flat for several years, but demographic changes, such as longer lifespans, and market volatility are nudging up rates," New York Governor Andrew Cuomo said. "As the COVID-19 pandemic continues to create uncertainty in the financial markets, it is important that our state pension fund entered this uncertain time as one of the strongest. We want to ensure that the fund to withstand tough challenges so that our public workforce can be confident in the future. Keeping the plan well-funded has helped improve New York's credit rating, which is a significant achievement, especially in states with poorly-funded pensions."

Is average  
reasonable for your  
district?

# Fund Balance Planning – Pensions



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- At year-end TRS liability will be recorded for all covered salaries for 2020-21 x 9.53% (A632)
  - ▣ Do you have an encumbrance to hold the funds?
- At year-end ERS liability will be recorded for all covered salaries from April 2021-June 2021 x applicable contribution rates (A637)
  - ▣ Do you have an encumbrance to hold the funds?
  - ▣ Was the payment made recorded properly?
    - Spring 2020 liability against A637
    - 9 months of 20-21 against A9010.8



# Post-Retirement Reporting- Overview

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- Section 217 of the Retirement and Social Security Law requires districts to:
  - ▣ Provide notification when a New York State and Local Retirement System (NYSLRS) retiree earns more than the Section 212 limit, which is currently \$35,000
  - ▣ Annually report all public retirees (including independent contractors/consultants) on payroll during the previous calendar year
    - Limit is based on total wages of all eligible employers
- Reporting done electronically through NYS ERS website
- Even if did not employ any public retirees during the previous calendar year, must still complete an annual report certifying that there are no public retirees to report



# Reporting Earnings Over \$35,000

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- Why?
- If collecting their pension, earnings above \$35,000 may affect pension benefit
  - ▣ For people lower than age 65
  - ▣ For retirees of:
    - New York State Employees' Retirement System
    - New York State Police and Fire Retirement System
    - New York State Teachers' Retirement System
    - New York City Employees' Retirement System
    - New York City Teachers' Retirement System
    - New York City Police Pension Fund
    - New York City Fire Department Pension Fund
    - New York City Board of Education

# \$35,000 Limit

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- ❑ Measured on a **calendar year**, not fiscal year
- ❑ All payments to retirees are counted
  - ❑ On payroll
  - ❑ Independent contractors/consultants (through A/P)
- ❑ Reporting due between January 1 – March 31 of the following year
- ❑ Once an employee reaches \$35,000 that is supposed to be reported immediately
- ❑ Note: \$35,000 limit was raised from \$30,000 in 12/2019, periodically changed

# Special Situation this Year

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- Limit has been temporarily suspended.
- By the Governor by executive order during the emergency.
- Pay from a public employer earned from March 27, 2020 through January 1, 2021 will not count toward a retiree's annual earnings cap.
- Future Executive Orders may extend these dates.

# Section 211 Waiver



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- ❑ What if Superintendent and/or BOE wants to hire a retired administrator for more than \$35,000 without affecting the person's pension?
- ❑ Can ask for a Section 211 waiver **before** hiring the person.
- ❑ The retiree must wait one year after retiring before returning to work in the same or similar position under a Section 211 waiver.

# Section 211 Waiver

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- ❑ A waiver covers a fixed period of time, up to two years.
- ❑ If need longer, need to ask for new waiver.
- ❑ Approval is not automatic; it depends on the employer's needs and employee's qualifications.
- ❑ District required to make reasonable efforts to find qualified, non-retired workers to fill vacancies first, and to show why Section 211 waivers are absolutely needed to hire people who are already retired.
- ❑ If approval is granted, earnings could be unlimited, unless person returns to a former employer.
- ❑ A "former employer" is any public employer that paid the employee a salary or compensation at any time during the two years before they retired, provided their retirement benefit is based in part on that salary and/or service.



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## Digging into STAC

What May a SBO Need to Know?

# What is STAC?

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## ***System to Track and Account for Children (STAC)***

- *The STAC and Medicaid Unit is the unit within the NYS Education Department responsible for processing requests for Commissioner's approval for reimbursement.*
- *This includes reimbursement approval for the costs of providing services to preschool and school-age students placed in special education programs at:*
  - ▣ *Public Placements (BOCES, District-Operated or Other Public)*
  - ▣ *SED-Approved Private Schools*
  - ▣ *Special Act School Districts*
  - ▣ *State-Supported*
  - ▣ *State-Operated Schools for the deaf and blind.*



# What is STAC?

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- *It also includes reimbursement approvals for students who have been determined to be homeless or runaway youth and for education services provided to incarcerated youth.*
- *The STAC Unit collects data needed for processing reimbursements on over 270,000 placements each year.*
  - *Who is arranging placement of the child*
  - *What provider will deliver the services*
  - *Which district has financial responsibility*
  - *Prior approvals and private placement certifications*
  - *Verification that services were delivered*
  - *State Aid Reimbursements based on STAC verifications*

*Source: STAC & Medicaid Unit: <http://www.oms.nysed.gov/stac/>*

# STAC Access

<http://www.oms.nysed.gov/stac/>

# Why Does the SBO Need Access?

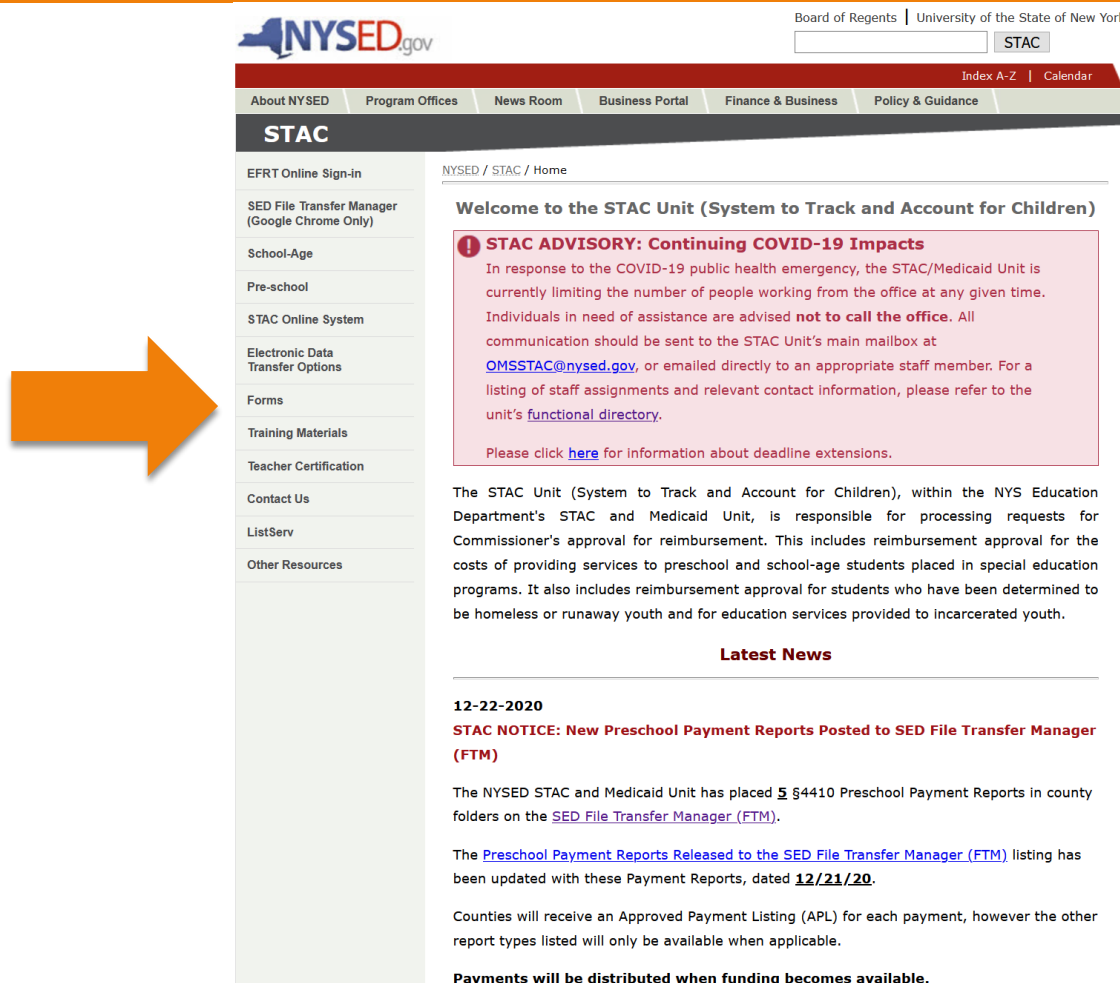
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- To review and ultimately receive aid reimbursement for students with disabilities.
- The district adds a “STAC” to the online system which means a record of the student is added along with the dates of enrollment and cost of service.
- **No STAC = No Aid!**



# How to Locate the Access Form

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The screenshot shows the NYSED.gov website. The top navigation bar includes 'Board of Regents | University of the State of New York' and a search box. Below this is a red header with 'STAC' and a navigation menu with links: 'About NYSED', 'Program Offices', 'News Room', 'Business Portal', 'Finance & Business', and 'Policy & Guidance'. The main content area is titled 'STAC' and features a left sidebar with links: 'EFRT Online Sign-in', 'SED File Transfer Manager (Google Chrome Only)', 'School-Age', 'Pre-school', 'STAC Online System', 'Electronic Data Transfer Options', 'Forms', 'Training Materials', 'Teacher Certification', 'Contact Us', 'ListServ', and 'Other Resources'. An orange arrow points to the 'Forms' link. The main content area displays a 'Welcome to the STAC Unit (System to Track and Account for Children)' message, followed by a 'STAC ADVISORY: Continuing COVID-19 Impacts' section. Below this is a 'Latest News' section with a date '12-22-2020' and a 'STAC NOTICE: New Preschool Payment Reports Posted to SED File Transfer Manager (FTM)'.

Board of Regents | University of the State of New York

STAC

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About NYSED Program Offices News Room Business Portal Finance & Business Policy & Guidance

STAC

NYSED / STAC / Home

**Welcome to the STAC Unit (System to Track and Account for Children)**

**STAC ADVISORY: Continuing COVID-19 Impacts**

In response to the COVID-19 public health emergency, the STAC/Medicaid Unit is currently limiting the number of people working from the office at any given time. Individuals in need of assistance are advised **not to call the office**. All communication should be sent to the STAC Unit's main mailbox at [OMSSTAC@nysed.gov](mailto:OMSSTAC@nysed.gov), or emailed directly to an appropriate staff member. For a listing of staff assignments and relevant contact information, please refer to the unit's [functional directory](#).

Please click [here](#) for information about deadline extensions.

The STAC Unit (System to Track and Account for Children), within the NYS Education Department's STAC and Medicaid Unit, is responsible for processing requests for Commissioner's approval for reimbursement. This includes reimbursement approval for the costs of providing services to preschool and school-age students placed in special education programs. It also includes reimbursement approval for students who have been determined to be homeless or runaway youth and for education services provided to incarcerated youth.

**Latest News**

**12-22-2020**

**STAC NOTICE: New Preschool Payment Reports Posted to SED File Transfer Manager (FTM)**

The NYSED STAC and Medicaid Unit has placed **5** \$4410 Preschool Payment Reports in county folders on the [SED File Transfer Manager \(FTM\)](#).

The [Preschool Payment Reports Released to the SED File Transfer Manager \(FTM\)](#) listing has been updated with these Payment Reports, dated **12/21/20**.

Counties will receive an Approved Payment Listing (APL) for each payment, however the other report types listed will only be available when applicable.

**Payments will be distributed when funding becomes available.**

[http://www.oms.nysed.gov/stac/contact\\_us/form\\_requests.html](http://www.oms.nysed.gov/stac/contact_us/form_requests.html)

# Request Form for Online Access to the STAC Database (Employees)

This form is used by representatives of School Districts, SED-approved Education Providers (including BOCES), and Municipalities who wish to access data directly from the STAC database. This application is required to obtain a valid User Code and password or change access rights for existing users. By signing this application, Superintendents (for school districts and BOCES), Program Directors (for SED-approved special education providers), and Section 4410 Municipality Representatives (for municipality access) are assuring the STAC and Medicaid Unit that individuals listed are authorized to view data on the STAC database. Districts are responsible for making sure that only authorized individuals are granted access to the STAC Online System.

AGENCY INFORMATION	
Agency Type: <input checked="" type="checkbox"/> School District <input type="checkbox"/> Private Provider BOCES Special Act District <input type="checkbox"/> Municipality <input type="checkbox"/> I.Y. Program	Contact Designated for STAC Unit
Name of Above:	Mailing Address
12-digit SED (BEDS) Code:	City
	Phone

Name, Title and E-mail address are required for all requests. Check *one* Approvals box AND/OR *one* Verify box.

NAME	TITLE	EMAIL	APPROVE	VERIFY
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

## Who needs access?

- Superintendent
- SBO
- Treasurer
- PPS
- Support Staff

### THIS FORM MUST BE COMPLETED AND SIGNED BY:

- **DISTRICT SUPERINTENDENT** (SCHOOL DISTRICT, BOCES, SPECIAL ACT DISTRICT & I.Y. PROGRAM)
- **PROGRAM DIRECTOR (PRIVATE PROVIDER)**
- **MUNICIPALITY REPRESENTATIVE (COUNTY)**

Access to the STAC database will comply with the requirements of the federal Family Educational Rights and Privacy Act (20USC § 1232-g) and 8 NYCRR §200.2 (b)(6).

Signature	Title	Date
Print Name	Telephone (Area Code) (Number)	
Email Address	Fax (Area Code) (Number)	

### Return original form to:

New York State Education Department  
 STAC and Medicaid Unit  
 89 Washington Avenue, Room 514 EB  
 Albany, NY 12234

Attention: Kelly Mason  
 Adam Lenhardt



All User Codes and passwords will be sent to the authorizing official indicated in the signature section of this application. Request forms signed by someone other than the appropriate individual will be rejected. Please notify the STAC Unit of any unauthorized sharing of Usercodes and passwords, so that the STAC Unit can discontinue access to any affected Usercodes and passwords.

[http://www.oms.nysed.gov/stac/forms/stac\\_access\\_form.pdf](http://www.oms.nysed.gov/stac/forms/stac_access_form.pdf)

# STAC Online Access

28

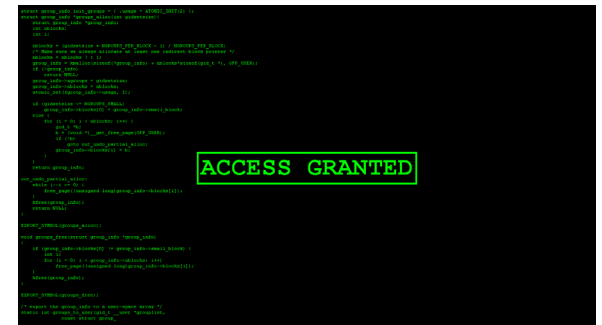
- ***Do you know who has access in your district?***
- **Reminder:** STAC users must be re-authorized each year by the Superintendent.
  - ▣ Have him/her review users annually, remove staff that no longer need access.
- Deadline is **January 15<sup>th</sup>!**  
[http://www.oms.nysed.gov/stac/forms/stac\\_access\\_form.pdf](http://www.oms.nysed.gov/stac/forms/stac_access_form.pdf)

# Granted Access

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- Once you send the signed paper access form to SED, they will mail a paper copy of the STAC User ID and Password to the Superintendent.
- At this point, you will now be able to login to the STAC Online System:

<http://www.oms.nysed.gov/stac/>






**System to Track and Account for Children (STAC) and Medicaid Unit**  
**Steven Wright, Director**

89 Washington Avenue • Room 514 EB • Albany, NY 12234

Telephone: (518) 474-7116

STAC E-mail: omsstac@nysed.gov

STAC Website: <http://www.oms.nysed.gov/stac>

Medicaid E-mail: medined@nysed.gov

Medicaid Website: <http://www.oms.nysed.gov/medicaid>

TO: SUPERINTENDENT [REDACTED]  
[REDACTED] - [REDACTED]

FROM: Steven Wright, Director, STAC/Medicaid Unit

DATE: November 2020

SUBJECT: 2020-21 Reverification/Suspension of STAC Online Users  
(via the XTEND Online Screen)

**January 15<sup>th</sup>**  
**Deadline**

**WARNING**  
**DUE DATES ARE CLOSER**  
**THAN THEY APPEAR**

This memo is to remind School District Superintendents of their responsibility to monitor and ensure that only appropriate users at the school district have access to confidential student information in the STAC online system. The "XTEND" online screen provides School District Superintendents with the ability to reverify or suspend district user rights for School District, Incarcerated Youth, and Consultant STAC Online Users. A list of all active STAC system online users for your school district will appear on the XTEND screen. This screen also contains all suspended users for your school district for the past two years. **All users are set to expire on January 15, 2021. If no action is taken by the School District Superintendent prior to that date, the users will be locked out of the STAC online system and reimbursement to your school district could be impacted.**

The XTEND screen cannot be utilized by District Superintendents to add new STAC online users. The paper process for new users to apply for a Usercode and password to the STAC online system remains the same. New users must complete and forward to the STAC/Medicaid Unit a signed ["Request Form for Online Access to the STAC Database"](#), available from the Forms page on the STAC Unit website. Please contact OMSSTAC@nysed.gov if you have any questions regarding this process.

A User's Guide to the XTEND online screen can be found on the STAC website at [http://www.oms.nysed.gov/stac/stac\\_online\\_system/online\\_instructions/Guide\\_XTEND.pdf](http://www.oms.nysed.gov/stac/stac_online_system/online_instructions/Guide_XTEND.pdf)

Each School District Superintendent has been assigned a unique, case-sensitive Usercode and password to be used exclusively to access the XTEND screen. Your confidential information to access the XTEND screen is listed below:

Usercode: [REDACTED]

Password: [REDACTED]

**NOTE: The XTEND online screen is open year-round for School District Superintendents to suspend/reverify their users as necessary. Please keep your Usercode and password in a confidential folder for use throughout the year.**

BE ADVISED: The email address we have on file for you is [REDACTED]. If this is not correct, please let us know.

# SED File Transfer Manager



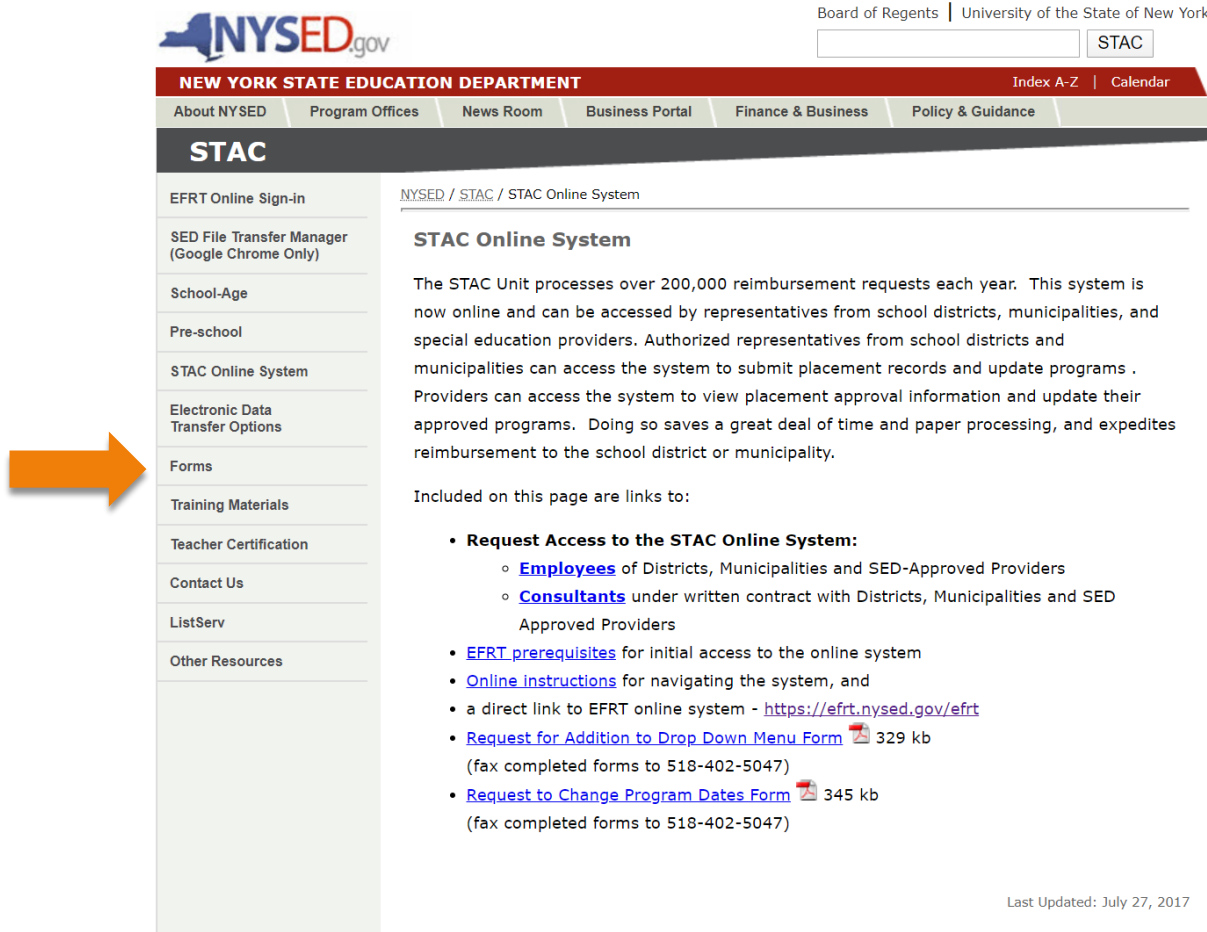
# SED File Transfer Manager (FTM)

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- ❑ **As an SBO do you wonder why you have not received any correspondence in the mail from SED?**
- ❑ It is because they have implemented a File Transfer Manager System (FTM) to upload files directly to your folder within the system. Also, you will have the ability to upload directly to SED.

# How to Access Form

33



The screenshot shows the NYSED website with the STAC Online System page. The left sidebar contains a list of links: EFRT Online Sign-in, SED File Transfer Manager (Google Chrome Only), School-Age, Pre-school, STAC Online System, Electronic Data Transfer Options, Forms, Training Materials, Teacher Certification, Contact Us, ListServ, and Other Resources. An orange arrow points to the 'Forms' link. The main content area is titled 'STAC Online System' and contains a paragraph describing the system and a list of links to request access.

Board of Regents | University of the State of New York

NEW YORK STATE EDUCATION DEPARTMENT

Index A-Z | Calendar

About NYSED | Program Offices | News Room | Business Portal | Finance & Business | Policy & Guidance

**STAC**

EFRT Online Sign-in

SED File Transfer Manager (Google Chrome Only)

School-Age

Pre-school

STAC Online System

Electronic Data Transfer Options

Forms

Training Materials

Teacher Certification

Contact Us

ListServ

Other Resources

NYSED / STAC / STAC Online System

### STAC Online System

The STAC Unit processes over 200,000 reimbursement requests each year. This system is now online and can be accessed by representatives from school districts, municipalities, and special education providers. Authorized representatives from school districts and municipalities can access the system to submit placement records and update programs. Providers can access the system to view placement approval information and update their approved programs. Doing so saves a great deal of time and paper processing, and expedites reimbursement to the school district or municipality.

Included on this page are links to:

- **Request Access to the STAC Online System:**
  - [Employees](#) of Districts, Municipalities and SED-Approved Providers
  - [Consultants](#) under written contract with Districts, Municipalities and SED Approved Providers
- [EFRT prerequisites](#) for initial access to the online system
- [Online Instructions](#) for navigating the system, and
- a direct link to EFRT online system - <https://efrt.nysed.gov/efrt>
- [Request for Addition to Drop Down Menu Form](#) 329 kb (fax completed forms to 518-402-5047)
- [Request to Change Program Dates Form](#) 345 kb (fax completed forms to 518-402-5047)

Last Updated: July 27, 2017

[http://www.oms.nysed.gov/stac/contact\\_us/form\\_requests.html](http://www.oms.nysed.gov/stac/contact_us/form_requests.html)



# SED File Transfer Manager (FTM)

35

- Web-based system that makes uploading and downloading files easier for both users and administrators.
- All school districts must have at least one active user registered with the SED FTM.
- Submit bulk special education reimbursement data to the NYSED STAC Unit.
- **Access to files uploaded to the SED FTM will comply with the requirements of the Federal Family Educational Rights and Privacy Act (20USC§1232-g) and 8NYCRR §200.2(b)(6).**

# SED File Transfer Manager (FTM)

36

- Email invitation will be sent to the email address listed on the form and will contain a personalized link to register in the SED File Transfer Manager.
- It is the Authorizing Official's responsibility to monitor and ensure that only appropriate users have access to confidential student information on the SED FTM.
- Utilize this form to remove access, as necessary.
- *Do you know who has access in your district?*



# Protecting STAC Data and Personally Identifiable Information (PII)

37

## Exchanging student data with the STAC Unit & helpful tips:

- FTM is most secure method for transmitting documentation with PII
- Fax during business hours and advise recipient when will be sent
- Emails with PII other than STAC ID need to be encrypted with password sent separately
- Paper documents should be sent US Mail 1st class/priority, or other service with tracking (e.g., UPS, FedEx, DHL)
- Use the STAC Online (EFRT) System and FTP site – log out when not active
- When calling STAC Unit be prepared with your STAC Online User Code and password to confirm authorization to share data



# New York State EDUCATION DEPARTMENT

Knowledge > Skill > Opportunity

User Name	<input type="text"/>
Password	<input type="password"/>
<input type="button" value="Login"/>	
<a href="#">Forgot Password?</a>	



**This software does not work with Internet Explorer. Please use another browser or your account will be locked out.**

**Accounts are created by invite only. Please do not try to create an account. You will need an invitation from a NYSED staff member.**

Powered by [GoAnywhere](#)

Email invitation will be sent to the **email address** listed on the form.

It will contain a personalized link to register in the SED File Transfer Manager.

# Accessing Three Folders

39

NYS ED  
.gov

New York State  
EDUCATION DEPARTMENT  
Knowledge > Skill > Opportunity

Logged in as: Beardsley107  
Last Login: 9/12/19 8:11:01 AM  
[Logout](#) | [Help](#)

Dashboard Secure Folders Address Book My Account ▾

Secure Folders

Location

<input type="checkbox"/>	Name ▾	Date Modified ▾	Size ▾
<input type="checkbox"/>	archive	3/30/18 10:54:41 AM	
<input type="checkbox"/>	inbasket	9/11/19 3:53:07 PM	
<input type="checkbox"/>	outbasket	9/11/19 8:39:28 AM	

When you click on your shared folder, you will see three folders:

**“archive”**: Old documents from prior FTP server.

**“inbasket”**: Uploaded by outsiders. Data coming in to the STAC Unit.

**“outbasket”**: Uploaded by STAC Unit. Data sent out by the STAC Unit.

# In-Basket Folder (*To* SED)

40

“**inbasket**”: Uploaded by district. Data coming into the STAC Unit

[Dashboard](#) [Secure Folders](#) [Address Book](#) [My Account](#) ▾

Secure Folders

Location  Applet Upload ▾

<input type="checkbox"/>	Name ▾	Date Modified ▾	Size ▾
<input type="checkbox"/>	Student Name <a href="#">STAC-1.pdf</a>	9/4/19 11:58:05 AM	170.52 KB
<input type="checkbox"/>	<a href="#">2 new 202s.pdf</a>	4/2/19 12:50:41 PM	770.88 KB
<input type="checkbox"/>	<a href="#">202 1 with end date and 2 new.pdf</a>	5/6/19 2:49:39 PM	1.25 MB
<input type="checkbox"/>	<a href="#">202 with end date (2).pdf</a>	2/15/19 2:50:36 PM	127.59 KB
<input type="checkbox"/>	<a href="#">202 with end date (3).pdf</a>	2/15/19 3:15:35 PM	126.17 KB

## Items that you may need to upload to SED:

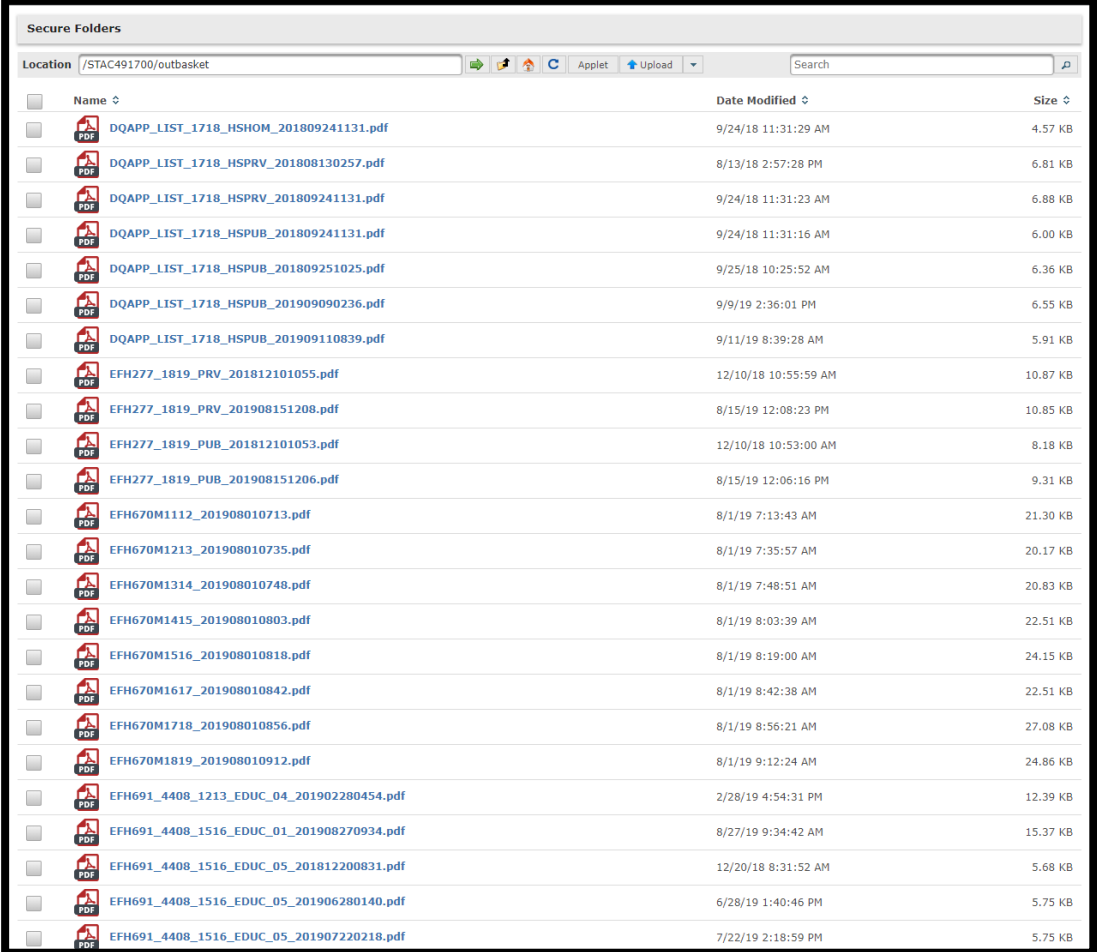
- STAC 1 Approval
- New STAC or FTM Access Form
- 1:1 Aide Form
- Summer Transportation Form
- DCPUB Back-up Information (IEP, Invoices etc.)

# Out-Basket Folder (*From* SED)

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This is the view when  
you pull up the  
**Out-Basket**

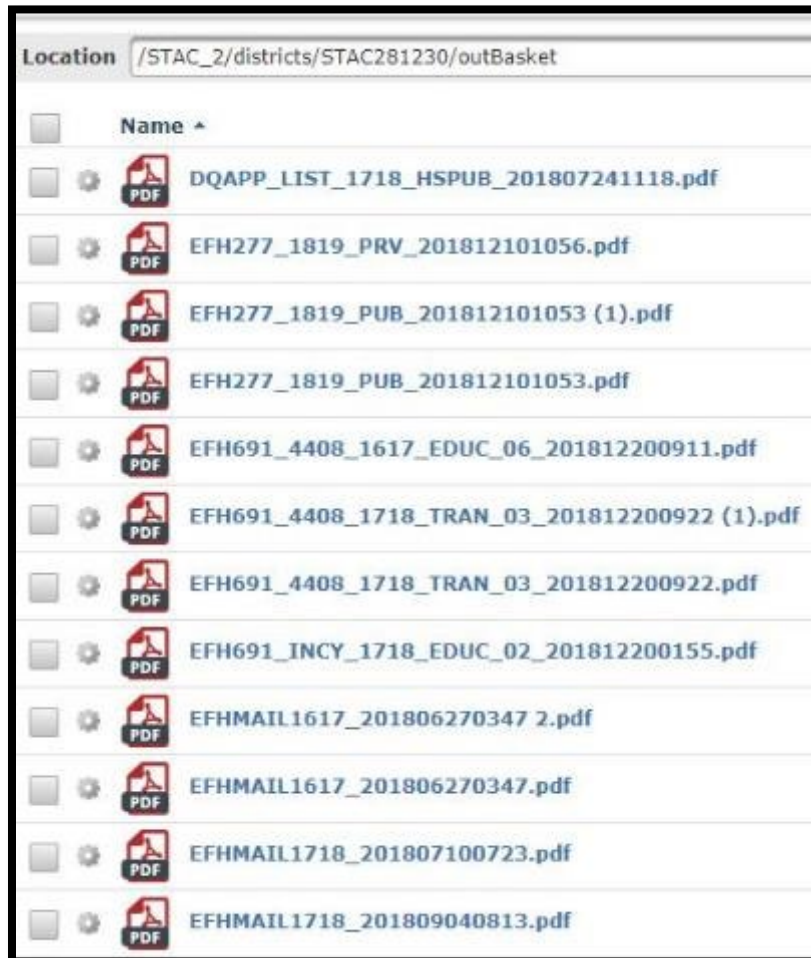
Reports cannot be  
deleted



Secure Folders		
Location /STAC491700/outbasket		
Name	Date Modified	Size
DQAPP_LIST_1718_HSHOM_201809241131.pdf	9/24/18 11:31:29 AM	4.57 KB
DQAPP_LIST_1718_HSPRV_201808130257.pdf	8/13/18 2:57:28 PM	6.81 KB
DQAPP_LIST_1718_HSPRV_201809241131.pdf	9/24/18 11:31:23 AM	6.88 KB
DQAPP_LIST_1718_HSPUB_201809241131.pdf	9/24/18 11:31:16 AM	6.00 KB
DQAPP_LIST_1718_HSPUB_201809251025.pdf	9/25/18 10:25:52 AM	6.36 KB
DQAPP_LIST_1718_HSPUB_201909090236.pdf	9/9/19 2:36:01 PM	6.55 KB
DQAPP_LIST_1718_HSPUB_201909110839.pdf	9/11/19 8:39:28 AM	5.91 KB
EFH277_1819_PRV_201812101055.pdf	12/10/18 10:55:59 AM	10.87 KB
EFH277_1819_PRV_201908151208.pdf	8/15/19 12:08:23 PM	10.85 KB
EFH277_1819_PUB_201812101053.pdf	12/10/18 10:53:00 AM	8.18 KB
EFH277_1819_PUB_201908151206.pdf	8/15/19 12:06:16 PM	9.31 KB
EFH670M1112_201908010713.pdf	8/1/19 7:13:43 AM	21.30 KB
EFH670M1213_201908010735.pdf	8/1/19 7:35:57 AM	20.17 KB
EFH670M1314_201908010748.pdf	8/1/19 7:48:51 AM	20.83 KB
EFH670M1415_201908010803.pdf	8/1/19 8:03:39 AM	22.51 KB
EFH670M1516_201908010818.pdf	8/1/19 8:19:00 AM	24.15 KB
EFH670M1617_201908010842.pdf	8/1/19 8:42:38 AM	22.51 KB
EFH670M1718_201908010856.pdf	8/1/19 8:56:21 AM	27.08 KB
EFH670M1819_201908010912.pdf	8/1/19 9:12:24 AM	24.86 KB
EFH691_4408_1213_EDUC_04_201902280454.pdf	2/28/19 4:54:31 PM	12.39 KB
EFH691_4408_1516_EDUC_01_201908270934.pdf	8/27/19 9:34:42 AM	15.37 KB
EFH691_4408_1516_EDUC_05_201812200831.pdf	12/20/18 8:31:52 AM	5.68 KB
EFH691_4408_1516_EDUC_05_201906280140.pdf	6/28/19 1:40:46 PM	5.75 KB
EFH691_4408_1516_EDUC_05_201907220218.pdf	7/22/19 2:18:59 PM	5.75 KB

# A Closer Look at the Reports

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Approval List (sent by user from EFRT)

10-month Private List

High-Cost Public List

Summer 4408 APR

STAC3 Approval List (generated monthly)

# What are the Reports

43

- **Agency Approval (DQAPP)**
  - Provides a detail list of students STAC'd by School Year, Provider Type, Placement Type and whether they are verified or unverified
- **10-month Private**
  - Provides a detail list of all the students STAC'd in a private placement for a particular school year
- **High-Cost**
  - Provides a detail list of all the students STAC'd in a public placement for a particular school year
- **Summer 4408 Approved Payment Report (APR)**
  - Includes the student's STAC ID, the student's first and last name, the provider, the start and end dates, the service type (education, maintenance or transportation), the amount included on that specific APR and the total amount to date
- **STAC3 Approval**
  - SED uploads a copy of the STAC approvals for the district to review

# Private Placements


Why Does the SBO Need to Understand Process?



# What To Know About Private Placements

45

## □ 853 Programs Serving Students with Disabilities

 **Special Education**  Search Special Education

News Data Funding Opportunities Publications Regulations Applications Budget and Finance Contact

853 Schools

Special Act Schools

State-Supported (4201) Schools

State-Operated Schools

Day

Residential

Out-of-State Schools

Area/Region

Disabilities Served

Justice Center

NYSED / P-12; EMSC / Special Education / Approved Private Schools / 853 Programs Serving Students with Disabilities

### 853 Programs Serving Students with Disabilities

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Name of Program/School	Region
Abilities First	<a href="#">Hudson Valley</a>
Anderson Center for Autism	<a href="#">Hudson Valley</a>
Andrus Children's Center	<a href="#">Hudson Valley</a>
ASCENT: A School for Individuals with Autism	<a href="#">Long Island</a>
Aspire of Western New York (formerly UCP of Western NY)	<a href="#">Western</a>
Astor Learning Center	<a href="#">Hudson Valley</a>
August Aichhorn School	<a href="#">NYC</a>
Autism Services	<a href="#">Western</a>
Baker Hall School	<a href="#">Western</a>
Birch Family Services, Inc.	<a href="#">NYC</a>

**What does the SBO need to know?**

-Is the CSE placement, SED approved?

These are the same 853 schools that the CARES Act grants needed to be shared with

# DCERT Screen – on February SBO Calendar

46

Date 05/06/16  
Time 11:10

New York State Education Department

Go to   
Menu

## PRIVATE PLACEMENT CERTIFICATION

STAC ID <input type="text" value="Z12348"/>	Name <input type="text" value="SMITH"/> JOHN	Date of Birth <input type="text" value="02/05/94"/>	Mode Inquiry
School Year <input type="text" value="1516"/>	CSE District <input type="text" value="010101010"/>	APPLE CSD	
Placement Type <input type="text" value="Day/In-State"/>	Certification Date	User	

Required for Inquiry

(Please Check ALL that apply)

**Certification** (For all Private Placements):  
Upon submission of this form, the school district representative of the Committee on Special Education (CSE) or his/her designee hereby certifies that all of the information on this form is true and accurate. All information is subject to verification by the New York State Education Department.

**Certification** (For all placements of students in an in-state or out-of-state approved private school):

- ☐ The CSE has provided a current individual evaluation or reevaluation of the student.
- ☐ The student has a current individualized education program (IEP).
- ☐ The student is of school-age and has a disability or combination of disabilities such that appropriate public facilities for instruction are not available.
- ☐ The CSE has documentation of its efforts to place the student in a public facility and the outcomes of those efforts, and/or of CSE findings regarding the lack of suitability of each currently available and geographically accessible public placement.
- ☐ The CSE has documentation of all efforts to enable the student to benefit from instruction in less restrictive settings using support services and supplementary aids and special education services, and/or for those services not used, a statement of reasons why such services were not recommended.
- ☐ The CSE has detailed evidence of the student's lack of progress in previous less restrictive programs and placements or a statement of reasons that such evidence is not available.
- ☐ In the case of a reapplication for reimbursement, the CSE has documentation of the continuing need for placement of the student in a private school.
- ☐ **For NYC only: Initial Year Nickerson Day Placements.** - The CSE is not able to make one or more of the above assurances because the student has an IEP recommendation for a public day program and the student was placed in a private school by the parent pursuant to a Nickerson Letter for the first time this school year.

**CSE Meeting Date**  
Must be before  
or equal to  
certification date

# DCERT Screen

47

**Additional Certification required for all Residential Placements - (in-state or out-of-state):**

The CSE recommends placement of a student in a residential program.

- ☐ Documentation is on record that residential services are necessary to meet the student's educational needs as identified in the student's IEP.
- ☐ Documentation is on record that includes a proposed plan and timetable for enabling the student to return to a less restrictive environment or a statement of reasons why such a plan is not currently appropriate.
- ☐ For **out-of-state** placement recommendations, documentation is on record that demonstrates that there are no appropriate public or private facilities for instruction available within this State.

**Additional Certification (For all initial placements in residential care):**

- ☐ Documentation is on record that, upon determination that the student was first at risk of residential placement, the district sought parental consent (or consent of the student if age 18 or older) to invite county or State agency representatives to the CSE meeting to make recommendations concerning the appropriateness of residential placement and other programs and placement alternatives. For students in a foster care placement, the local social services district was notified when the student was determined to be at risk of residential placement.
- ☐ Parental (or student) consent was obtained and other agency representative(s) were invited to the CSE meeting.

Invited county or State agency representative attended the CSE meeting.

☒ Choose One      ☐ Yes      ☐ No

**NOTE:** In order to obtain a timely determination of approval of State reimbursement, the certification must be received by the Department prior to requesting reimbursement. If the district fails to submit a certification, requests for State reimbursement for ten-month private placements will not be processed.

Date Transferred Into District

Inquire

Add

# DQCER Screen

48

Date 05/06/16  
Time 11:35

New York State Education Department

Go to

Private Placement Certification List

School Year  
1516

District  
010101010 APPLE CSD

Record Count 22

Last Name/First Name	STAC ID	Day/Res	In/Out of State	Certification Date/Time	CSE Meeting Date	User
JONES SARAH	Z12345	DAY	IN-STATE	06/29/15 12:34 PM	05/01/15	ABCDEFGH
SCOTT ALEX	Z12346	DAY	IN-STATE	06/29/15 12:43 PM	05/03/15	ABCDEFGH
SHORE KIM	Z12347	RES	IN-STATE	06/30/15 09:34 AM	05/15/15	ABCDEFGH
SHORE KIM	Z12347	DAY	IN-STATE	06/29/15 12:37 PM	05/15/15	ABCDEFGH

## SBO Tips:

- Does the record count seem reasonable?
- Compare previous year to current year
- Review Day/Res Status
- Review monthly & use to communicate with PPS

<https://www.questar.org/services/financial/stac/resources/>

# Helpful SED Links

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- STAC Acronyms, Terms and Commonly Used Screens
- Online Instructional Guides for Navigating the System and EFRT Screens
- ListServ
- Approved Private, Special Act, State-Operated and State-Supported Schools in NYS



# Additional Resources

50

<http://sap.questar.org>



BOCES STAFF BUSINESS & COMMUNITY PARENTS & STUDENTS SCHOOL DISTRICTS

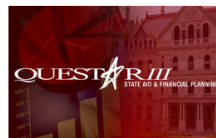
ABOUT EDUCATION SERVICES LOCATIONS NEWS CALENDAR CAREERS CONTACT REOPENING

## State Aid and Financial Planning

### State Aid Planning

SAP Home  
Contact Us  
24/7 Resources  
Guidebooks  
News  
Pricing  
STAC Service  
Topics  
Webinars  
Workshops

Questar III's *State Aid and Financial Planning Service* has assisted school districts and BOCES in navigating their way through the complex world of school finance for the last 40 years.



### 10 Days until the 2019-20 ESSA Report is Due!

Dec 21, 2020

This is the final countdown until ESSA is due. A few months ago, SED opened the IDEX portal for districts to be able to complete their ESSA financial report of actual expenditures for the 2019-20 school year.



### State Aid Claim Forms

Dec 21, 2020

If you receive a message from the State Aid Unit at SED about your 2020-21 Claim Forms, please keep in mind that it could be a matter of great importance in allowing the State Aid Unit to "Clean" your claim forms.



### Updated Tax Base Growth Factors

Dec 21, 2020

The NYS Department of Taxation and Finance has updated Tax Base Growth Factors for School Districts for 2021.

### SAP on Twitter



This is the final countdown with just ten more days until the 2019-20 ESSA report is due. Remember to utilize the template and other resources posted on our website to assist you in this process. Click here for details: [questar.org/2020](http://questar.org/2020)

# Additional Resources

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## Resources

### STAC Service

[STAC Home](#)

[Contact Us](#)

[Resources](#)

[News](#)

[Webinars](#)

[Workshops](#)


 [2019-20 Annual Tuition Summary Worksheet – April 2020](#)

 [2020-21 Excess Cost Aid Calculator for SWD – April 2020](#)

 [STAC User Reference Guide – September 2020](#)

 [Calendar for Filing STACs – September 2020](#)

 [DCERT Form](#)

 [Summer Related Services Only Form](#)

 [STAC Programs with June 30, 2021 Deadlines](#)



# Summary

52

- ✓ There is a lot of State Aid available related to special education students.
- ✓ The most common mistake we see when a district is not maximizing their State Aid is related to special education programs.
  - ✓ Homeless
  - ✓ Summer
  - ✓ In-District programs
- ✓ The more the you know, the easier it will be to ensure that your district is maximizing it State Aid. It is a lot easier to claim aid than to lay people off!
- ✓ We can help you. Give us a call.





# Questions?

53

## 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:

2/23/21 – March SBO Calendar  
3/25/21 – April SBO Calendar  
4/21/21 – May SBO Calendar  
5/26/21 – June SBO Calendar  
6/23/21 – July SBO Calendar