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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

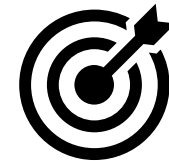
Monthly/Special Webinars focusing on a variety of topics.

The Knowledge Café

- 2021-22 Schedule
- Knowledge Café Zoom Link (Passcode: 319866)
- 2021-22 CTLE Registration Link
- Presentations
- Recorded Sessions



PUTTING STUDENTS FIRST



Knowledge Café July 2021

Sarah Morrison
State Aid Planning

Agenda

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- ❑ SBO Calendar for August 2021
 - ❑ Verifying Data Reported to SIRS
 - ❑ Attorney Reporting
 - ❑ ESSA Funded Consolidated Application
 - ❑ Tax Collection Process
- ❑ Questions and Answers



August SBO Calendar

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Task	Month	Due Date	Filing Requirement	Notes	Priority
Attorney Reporting	August	8/14/2021	Annually	Due 45 days after the close of the fiscal year - EL §2053	Recommended Best Practice
Submit school tax rates and school tax bill data files to school.taxrates@tax.ny.gov	August	8/17/2021	Annually	The 2020-21 due date was 8/17/2020. The 2021 due date of 8/17/2021 is used as an approximation here. Please check for updated communications from NYS DTF for the 2021-22 tax rate due date.	Required
School District Income Verification (SDIV) - Review of ORPTS-assigned school codes by school districts	August	8/20/2021	Annually	https://www.tax.ny.gov/research/property/valuation/sdiv/index.htm	Recommended Best Practice
Billings (transportation, use of facilities, health services, parentally placed non-public etc.)	August	8/31/2021	Monthly		Recommended Best Practice
Budget Status Reports to Board of Education including revenue and appropriation status reports	August	8/31/2021	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. Other information may be included as necessary.	Required
Business Office Orientation for New School Employees (if applicable)	August	8/31/2021	Annually		Recommended Best Practice
Cash Flow and Fund Balance - modify assumptions, update, and review for accuracy	August	8/31/2021	Monthly		Recommended Best Practice
Direct Certification matching process DCMP (food service)	August	8/31/2021	Annually		Recommended Best Practice

August SBO Calendar

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Task	Month	Due Date	Filing Requirement	Notes	Priority
Ensure students' prior year eligibility status for free/reduced meals is carried over for first 30 operating days of the 2021-22 school year	August	8/31/2021	Annually		Recommended Best Practice
Federal and State Cafeteria Reimbursement Form	August	8/31/2021	Monthly		Recommended Best Practice
LEA Consolidated Application for ESSA-Funded Programs	August	8/31/2021	Annually		Recommended Best Practice
Monthly Profit/Loss Statements for Food Service	August	8/31/2021	Monthly	Perform analysis on prior month's activities	Recommended Best Practice
Payroll Reports – ERS/TRS Payments and Reports	August	8/31/2021	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	August	8/31/2021	Monthly		Recommended Best Practice
Prepare for accounting and reporting of Community Schools Set-Aside funds due in annual September SAMS filing through NYSED business portal (SS-8)	August	8/31/2021	Annually	Due 9/2/2021 - EL §3601. Programmatic questions can be directed to the Office of Student Support Services. Questions related to operation or submission of the SAMS form should be directed to State Aid.	Recommended Best Practice
Prepare Forms - A, FT, FB, and ST-3	August	8/31/2021	Annually	Due 9/2/2021 - EL §3601.	Recommended Best Practice
Prepare Management Discussion and Analysis for Financial Statements	August	8/31/2021	Annually	As part of the 2020-21 audited financial statements due 10/15/2021	Recommended Best Practice
Prepare Tax Warrant and Collection Process for BoE Approval (CSDs & UFSDs)	August	8/31/2021	Annually	The Board of Education must approve the tax warrant by the warrant date. Warrant dates will vary throughout the state but for the most part on or before 9/1 for Central Schools and Union Free Schools, on or before 10/1 for Small Cities and Big Five. In Nassau County, Long Island the tax warrant date is August 15th. Suffolk County warrant date is October 1st.	Required

August SBO Calendar

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Task	Month	Due Date	Filing Requirement	Notes	Priority
Publish Annual Financial Statement	August	8/31/2021	Annually	If not done in July (small city school districts must publish their Annual Financial Statement within three months of the close of the fiscal year)	Recommended Best Practice
Review BOCES invoices for appropriate services and charges	August	8/31/2021	Monthly		Recommended Best Practice
State and Federal Projects - review for expenditures and revenues. Submit FS-25's request for funds to Grants Finance	August	8/31/2021	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
Submit Transportation Leases to the Office of Education Management Services	August	8/31/2021	Annually	Aid on leases begins 12 months after the lease begins. Only leases approved by Education Management Services will be aided.	Recommended Best Practice
Tax Collectors Notice	August	8/31/2021	Annually	Publish twice in two newspapers with 1st notice one month before taxes are due on 9/30 to inform property owners of 9/1 to 9/30 tax collection period. Required by RPTL §1322.	Recommended Best Practice
Teacher and support staff Salary Statements - update if necessary	August	8/31/2021	Annually		Recommended Best Practice
Transportation Contracts - must be signed by contractor & Board President or designee on or before the date service begins. Must be signed by Superintendent on or after the contract agreement date	August	8/31/2021	Annually	Executed contracts must be submitted to SED within 120 days of the start of service. Transportation Aid will be prorated if contract is signed after start of service regardless of 120 days.	Recommended Best Practice
Transportation Information - (bus route, pick-up time, drop-off etc.)	August	8/31/2021	Annually		Recommended Best Practice
Treasurer's Report	August	8/31/2021	Monthly	Report on prior month's activities	Required
Update meal pricing in food service point of sale systems - BoE approved for full meal prices, input updated federal and state meal reimbursement rates (See CNMS website for updated rates)	August	8/31/2021	Annually	http://www.cn.nysed.gov/content/reimbursement-rates	Recommended Best Practice

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Check Data Reported to SIRS

Due by Week of August 9th

Check 7/8/21 Posting on stateaid.nysed.gov

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To: State Aid Designees

From: Storme Sing-Wai
Bureau Chief, Office of State Aid

Date: July 8, 2021

Subject: **Final Review and Correction of Fall 2020 Enrollment and Free & Reduced Price Lunch (FRPL) Counts Affecting your District's State Aid**

In August 2021, the Office of Information Reporting Services (IRS) will finalize the SIRS and BEDS Online files containing Fall 2020 enrollment and Free and Reduced Price Lunch (FRPL) counts used for State Aid purposes. After this time, districts will no longer be able to revise these counts. This data directly affects the amount of State Aid received by your district. Please review the Fall 2020 enrollment and FRPL counts currently on file with the Department to ensure the data is accurate.

Inaccurate Fall 2020 FRPL counts for students in kindergarten through grade 6 must be revised in SIRS no later than the week of August 9th in order to view data in the final L2RPT refresh before SIRS is closed on August 20, 2021. (Please consult your Level 1 data center for processing deadlines.)

Only Fall 2020 BEDS Day enrollment counts may be revised. Prior year enrollment and FRPL counts are no longer subject to change.

Why Is This Important?

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- These student counts will be used in **many State Aid formulas**
 - ▣ Generally, two-year lag
 - ▣ 2020-21 *data will be frozen August 20th, 2021, and will not be able to be changed*
- SWD counts for MOE comes from SIRS reporting



Where to Check & How to Correct

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To review data aggregated to the district level, please access the **Three-Year Enrollment Summary Report** available on the Information and Reporting Services Portal (IRSP – <http://portal.nysed.gov>). This report displays the Fall 2020 BEDS Day enrollment and FRPL counts and the two prior years for comparison purposes. The data included in the report comes from both Student Information Repository System (SIRS) and BEDS Online. The SIRS system contains reports (L2RPT Verification Reports) to facilitate your review. These L2RPT reports can be used to drill down into the SIRS data records associated with the aggregated counts displayed on the Three-Year Summary Report.

Information on accessing and using the IRSP can be found at: <http://www.p12.nysed.gov/irs/irs-portal/>.
Please contact your district's Data Coordinator to facilitate revisions to your district's SIRS data.



NOTE: Charter school and nonpublic school enrollment is not your district. If charter school and/or nonpublic school enrollment is included, please contact the school(s) Data Coordinator to request a review of the data on BEDS Online (for nonpublic schools).

Please contact Ellen Martin in the Office of Information Technology for data changes. (ellen.martin@nysed.gov).

Thank you in advance for your efforts to ensure the accuracy of the data used to calculate your district's State Aid.

Topics:

Logging into the IRSP

Downloading files from the IRSP

Uploading files to the IRSP

Granting Access & Delegating Rights to the IRSP using SEDDAS

Email notifications for IRSP-delivered files

IRSP & Related Support



Information is Also in Business Portal

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Application Business Portal

You are logged in as

My Applications

- 📌 Facilities Planning - Fire Safety
- 📌 IRS Data Exchange (IDEx)
- 📌 Information and Reporting Services Portal (IRSP)
- 📌 New York State Student Identification System (NYSSIS)
- 📌 PD System
- 📌 SED Monitoring and Vendor Performance System
- 📌 SSBA Reimbursement
- 📌 State Aid Management System (SAMS)



Table of Contents

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PLEASE NOTE:

The IRS Portal is a secure file transport for documents. **LEAs and Schools must download ALL files when received and securely store them on their own local network.**

Three Year Enrollment Summary Report - *** REPORTS FOR 2020-21 SCHOOL YEAR ***

The Three Year Enrollment Summary report is available for State Aid Designees and District Data Coordinators to review. The report displays three years of BEDS Day enrollment and free and reduced price lunch eligible counts based on data reported via the SIRS and BEDS on-line data systems (Fall 2018 to Fall 2020). This report includes identification of outlier values. This outlier flag is for your convenience in assuring the quality and accuracy of data reporting. More description is provided in Note [8] of this report. This report will be refreshed with data from SIRS and SED on a weekly basis until the final Fall 2020 SIRS/BEDS on-line data is extracted. If charter or nonpublic schools are located within your district and/or resident students from your district attend charter or nonpublic schools, the Three Year Enrollment Summary will contain supplemental reports displaying these data for your district.

Please Note: For 2020-21 BEDS Day UPK enrollment will not be used for calculating maximum grant payable. Instead, UPK enrollment will be pulled from SIRS for January 15, April 16 and June 4. Rows 21 - 25 of the summary report are presented for historical continuity and for your information only.

To check for additional information please visit <https://stateaid.nysed.gov/> Latest News.

Pre-K Enrollment Records Missing Required Pre-K Program or UPK Setting Codes - *** REPORT FOR 2020-21 SCHOOL YEAR ***

This report displays student level records that are missing either the required Pre-K program code (902 UPK; 990 Other Pre-K Programs) or UPK Setting code for those with 902 UPK Pre-K program code. Students missing required Pre-K program code or required UPK setting codes will not be included by State Aid in the calculation of the district UPK grant payable.

Click
Here
to
Sort

Show 10 entries

Search:

Name	Description	Date Created	Download the File
3 year BEDS enrollment summary	Show Description	07/06/2021 01:09 PM	
3 year BEDS enrollment summary - charter school district of residence	Show Description	07/06/2021 01:07 PM	
3 year BEDS enrollment summary - nonpublic school district of residence	Show Description	07/06/2021 01:05 PM	

Example of 3-Year Enrollment Report



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STATE AID 3-YEAR BEDS DAY ENROLLMENT SUMMARY

MODIFIED DATE: 7/3/2021

School District

Row Description [1]	October BEDS Day			
	Out- lier [8]	Fall 2020 [2]	Fall 2019	Fall 2018
1 SIRS: KH (Kindergarten Half-day)		0	0	0
2 SIRS: KF (Kindergarten Full-day)		55	69	65
3 SIRS: GRADES 1-3		201	203	207
4 SIRS: GRADES 4-6		224	233	212
5 SIRS: UGE (UnGraded Elementary)		0	0	0
6 SIRS: GR 7-12		411	395	407
7 SIRS: UGS (UnGraded Secondary)		0	0	0
8 SIRS: NON RESIDENT STUDENTS ENROLLED IN PUBLIC SCHOOLS IN THIS DISTRICT		1	0	0
9 SIRS: RESIDENT STUDENTS ENROLLED IN PUBLIC SCHOOLS IN ANOTHER DISTRICT FOR WHOM THIS DISTRICT IS PAYING OR COULD BE CHARGED TUITION [5]		1	1	2
10 BEDS ONLINE: RESIDENT STUDENTS ENROLLED IN NON-PUBLIC SCHOOLS W TUITION PAID BY PARENTS OR OTHERS - AS REPORTED TO SED BY NONPUBLIC SCHOOLS [3][5]		31	45	41
11 SIRS: RESIDENT STUDENTS WITH DISABILITIES ENROLLED IN BOCES FULL TIME [5]		16	15	16
12 SIRS: RESIDENT GENERAL EDUCATION STUDENTS ENROLLED IN BOCES FULL TIME [5]		3	3	2
13 SIRS: APPROVED PRIVATE SCHOOL OR SPECIAL ACT SCHOOL (4405 PUPILS) [5]		3	3	3
14 SIRS: NYS SCHOOL FOR THE DEAF AT ROME OR NYS SCHOOL FOR THE BLIND AT BATAVIA [5]		0	0	0
15 BEDS ONLINE: RESIDENT AND NON RESIDENT PUPILS ATTENDING NON PUBLIC SCHOOLS IN THIS DISTRICT - AS REPORTED TO SED BY NONPUBLIC SCHOOLS [3][5]		0	0	0
16 SIRS: RESIDENT HOMEBOUND STUDENTS EDUCATED AT DISTRICT EXPENSE [5]		1	1	0
17 SIRS: K-6 FREE LUNCH ELIGIBLE APPLICANTS		104	110	85
18 SIRS: 7-12 FREE LUNCH ELIGIBLE APPLICANTS	+	77	46	74
19 SIRS: K-6 REDUCED PRICE LUNCH ELIGIBLE APPLICANTS		10	10	19

Charter Schools and Non-Public Reports

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Resident Students Enrolled in Non-Public Schools with Tuition Paid by Parents or Others On BEDS Day - Fall 2020

MODIFIED_DATE:
7/3/2021

School District

Non-Public School Name	Non-Public School ID:	Kindergarten through Grade 6 Count:	Grade 7 through Grade 12 Count:
ALBANY ACADEMIES (THE)	010100996428	0	2
ALL SAINTS' CATHOLIC ACADEMY	010100115684	2	0
DOANE STUART SCHOOL (THE)	491200995972	3	1
EMMA WILLARD SCHOOL	491700997083	0	2
FREE SCHOOL	010100997616	1	1
HOLY SPIRIT SCHOOL	490301115686	6	2
LA SALLE INSTITUTE	490801116667	0	3
LOUDONVILLE CHRISTIAN SCHOOL	010623806562	2	2
ST PIUS X SCHOOL	010623115753	0	1
WOODLAND HILL MONTESSORI SCHOOL	490301999028	2	1

Resident Students Enrolled in Charter Schools On BEDS Day - Fall 2020

Modified Date: 7/3/2021

School District

Charter School Name	Charter School ID:	Kindergarten through Grade 6 Count:	Grade 7 through Grade 12 Count:
GREEN TECH HIGH CHARTER SCHOOL	010100860907	0	2

Where Do the Numbers Come From?

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Second page provides specific details of source of information:

TIP!

STATE AID 3-YEAR BEDS DAY ENROLLMENT SUMMARY - DATA MAPPING

Row	Description [1]	Fall 2020 DATA SOURCE [2]	Fall 2019 DATA SOURCE	Fall 2018 DATA SOURCE
1	SIRS: KH (Kindergarten Half-day)	SIRS (L2RPT SIRS 313 - K-half-day)	SIRS (L2RPT SIRS 313 - K-half-day)	SIRS (L2RPT SIRS 313 - K-half-day)
2	SIRS: KF (Kindergarten Full-day)	SIRS (L2RPT SIRS 313 - K-full-day)	SIRS (L2RPT SIRS 313 - K-full-day)	SIRS (L2RPT SIRS 313 - K-full-day)
3	SIRS: GRADES 1-3	SIRS (L2RPT SIRS 313 - Gr 1 + Gr 2 + Gr 3))	SIRS (L2RPT SIRS 313 - Gr 1 + Gr 2 + Gr 3))	SIRS (L2RPT SIRS 313 - Gr 1 + Gr 2 + Gr 3))
4	SIRS: GRADES 4-6	SIRS (L2RPT SIRS 313 - Gr 4 + Gr 5 + Gr 6))	SIRS (L2RPT SIRS 313 - Gr 4 + Gr 5 + Gr 6))	SIRS (L2RPT SIRS 313 - Gr 4 + Gr 5 + Gr 6))
5	SIRS: UGE (UnGraded Elementary)	SIRS (L2RPT SIRS 313 - UGE)	SIRS (L2RPT SIRS 313 - UGE)	SIRS (L2RPT SIRS 313 - UGE)
6	SIRS: GRADES 7-12	SIRS (L2RPT SIRS 313 - Gr 7 + Gr 8 + Gr 9 + Gr 10 + Gr 11 + Gr 12))	SIRS (L2RPT SIRS 313 - Gr 7 + Gr 8 + Gr 9 + Gr 10 + Gr 11 + Gr 12))	SIRS (L2RPT SIRS 313 - Gr 7 + Gr 8 + Gr 9 + Gr 10 + Gr 11 + Gr 12))
7	SIRS: UGS (UnGraded Secondary)	SIRS (L2RPT SIRS 313 - UGS)	SIRS (L2RPT SIRS 313 - UGS)	SIRS (L2RPT SIRS 313 - UGS)
8	SIRS: NON RESIDENT STUDENTS ENROLLED IN PUBLIC SCHOOLS IN THIS DISTRICT	SIRS (L2RPT SIRS 312 - cols. i + j))	SIRS (L2RPT SIRS 312 - cols. i + j))	SIRS (L2RPT SIRS 312 - cols. i + j))
9	SIRS: RESIDENT STUDENTS ENROLLED IN PUBLIC SCHOOLS IN ANOTHER DISTRICT FOR WHOM THIS DISTRICT IS PAYING OR COULD BE CHARGED TUITION [5] [7]	SIRS (L2RPT SIRS 312 - col. d))	SIRS (L2RPT SIRS 312 - col. d))	SIRS (L2RPT SIRS 312 - col. d))

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Attorney Reporting

Due 8/14/21

Attorney Reporting – Education Law §2053 – What is this All About?

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Remember
this story?

In a separate ongoing investigation, Attorney General Cuomo uncovered abuses by independent contractors throughout the state who defrauded the pension system by holding themselves out as public employees entitled to pension benefits, resulting in the return of over \$1.9 million to taxpayers through actions involving the conduct of more than 70 attorneys and other professionals. As a permanent fix, the Attorney General spearheaded legislative reform to curb pension fraud and rein in double-dipping.

Where can you find additional information about this requirement?

- [Education Law Section 2053 : Reporting : P-12 : NYSED](#)

Attorney Reporting was the Outcome

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Education Law Section 2053 Reporting

Chapter 640 of the Laws of 2008 added sections 2050-2054 of the Education Law. This legislation created new penalties for pension fraud and increased transparency and accountability in school spending. Section 2051 prohibits a lawyer from simultaneously being an independent contractor and an employee of a school district or BOCES for the purpose of providing legal services to the district or BOCES. Section 2052 establishes penalties for violations of section 2051.

As part of the new reform measures, all school districts and BOCES are required by Section 2053 to submit to the Attorney General, the State Comptroller, and the State Education Department information concerning all lawyers who provide legal services to the districts or BOCES for each fiscal year. To streamline the reporting requirements of section 2053, the three State agencies have created an electronic filing system that will allow districts and BOCES to electronically submit information for use by the three agencies. Instructions for using the e-filing system are included below. Please do not send any information by e-mail or regular mail.

Reporting Done in the Business Portal

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 **My Applications**

- 🔑 **SEDDAS User Guide**
- 🔑 IRS Data Exchange (IDEx)
- 🔑 Information and Reporting Services Portal (IRSP)
- 🔑 SED Delegated Account System (SEDDAS)
- 🔑 **SED Monitoring and Vendor Performance System**
- 🔑 SSBA Reimbursement
- 🔑 State Aid Management System (SAMS)

Owners

- Education Management Services (1)** →
- Office of Audit Services (5)
- Smart Schools Bond Act (2)

Inbox		Outbox ↓	
↑		↑	
Survey Recipient	Survey	Cycle	Status
	SCHOOL DISTRICT-ED LAW SECTION 2053	2020	Approved
	SCHOOL DISTRICT-ED LAW SECTION 2053	2019	Approved

What is Included on the Survey

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Legal Services Providers Instructions

Please enter information about each individual Attorney/Law Firm providing legal services to your School District during the 2019-2020 fiscal year.

In question 3, please add the attorney name(s) and last four digits of social security number(s). This information will be utilized by the Office of the State Comptroller for verification purposes.

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How were legal services provided to your School District during the 2019-20 fiscal year?

- ☐ Attorney on District Payroll
- ☒ Law Firm on Contract
- ☐ Attorney on Payroll and Law Firm on Contract
- ☐ Other Providers of Legal Services (BOCES services should not be included). BOCES services should be listed in question 3.

Please answer the following questions based on selection(s) in question 1.

- If you selected "Attorney on Payroll", provide responses to question 2
- If you selected "Law Firm", provide responses to questions 3-8
- If you selected "Attorney on Payroll" and "Law Firm on Contract", complete questions 1-8
- If you selected "Other Providers", complete questions 9-10



Example of Attorney Reporting

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List the names of all attorney(s) and their health and non-retirement benefits that appeared on your School District payroll in 2019-2020.

If more than one attorney is providing services to your school district/BOCES, add a row in the table below to continue entering information.

Name: ▾	List health and other non-retirement benefits ▾
<input type="checkbox"/>	<input type="checkbox"/>

Law Firm Information Only:

If your School District legal services are provided through a contract with a Law Firm, please provide responses to questions 3,4,5,6,7,8

Example of Attorney Reporting

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Please provide the Law Firm Contact Information:

Please list the name and contact information of the Law Firm and the lawyer(s) within that firm that provides services to your school district/BOCES in 2019-2020. If more than one Law Firm is providing services to your school district/BOCES, add a row in the table below to continue entering information.

Name of Attorney:	List the last four digits of the attorney social security number. <i>Office of the State Comptroller will verify.</i>	Name of Law Firm:	Address:	City	State	Zip:	Phone:
JEFFREY <input type="text"/>	<input type="text"/>	<input type="text"/> Firm, PLLC	<input type="text"/>	Albany	NY	12205	<input type="text"/>
PAUL <input type="text"/>	<input type="text"/>	<input type="text"/> Firm, PLLC	<input type="text"/>	Albany	NY	12205	<input type="text"/>

Example of Attorney Reporting

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List attorney(s) in question 3 that are on your School District payroll.

Add a row to the table to continue entering information.

Name of Attorney:	List amount paid to the School District ?
NONE	<input type="checkbox"/>

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Law Firm Contract Amounts:

If the Law Firm is providing you with more than one type of service, list each service from the "services provided" drop-down menu and the related contract amounts paid.

Federal ID:	Services Provided:	Total Compensation for Legal Services:	Does the law firm have a retainer agreement or contract with your School District?
47- <input type="text"/>	General Services	39,594.00	YES
47- <input type="text"/>	Litigation	6,780.00	YES

Example of Attorney Reporting

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Please list all Attorney/s listed in questions 3 and 4 enlisted in the NYS Employees Retirement System ("ERS"), the NYS Teachers' Retirement System ("TRS"), or any public retirement system of the state of New York.

Add a row in the table below to continue entering information.

Name of Attorney

NONE

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Did any Attorneys associated with the Law Firms listed above receive any additional benefits or compensation, including (non-cash) from the School District? This includes any benefits or compensation separate from the total compensation listed in question 5.

☐ YES

☒ NO

Example of Attorney Reporting

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8 If yes, please provide the name(s) of Attorney(s) receiving benefits/compensation:

Please list all Attorneys that received additional benefits or compensation from your school district/BOCES in the fiscal year. This includes Attorneys providing legal services enlisted in the NYS Employees Retirement System ("ERS"), the NYS Teachers' Retirement System ("TRS"), or any public retirement system of the state of New York.

Name of Attorney:	Describe additional benefits/compensation
NONE	<input type="checkbox"/>

9 Did your School District receive any legal services from any other provider during the 2019-20 fiscal year?

- ☐ YES
☒ NO

10 If yes, were the attorneys providing legal services enlisted in the NYS Employees Retirement System ("ERS"), the NYS Teachers' Retirement System ("TRS"), or any public retirement system of the state of New York?

Please list all Attorneys that received additional benefits or compensation from your school district/BOCES in the fiscal year.

Name:	Public Retirement System
<input type="checkbox"/>	<input type="checkbox"/>

? Help

What To Do Now

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- ❑ Make sure you have access to the form
 - ❑ If not, request from Superintendent
- ❑ Print a blank copy of what is needed
- ❑ Print a copy of what was reported previously
- ❑ Have staff gather the information
- ❑ Review information to ensure no issues
- ❑ Complete report by 8/14/21



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LEA Consolidated Application for ESSA Funded Programs

Due 8/31/21

Consolidated Application Covers All of These Federal Programs

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Intent to Apply

1. **Does the LEA intend to apply for Title I, Part A funding for the 2021-22 school year?**
Yes, the LEA intends to apply for Title I, Part A funding for the 2021-22 school year.
No, the LEA did not receive an allocation for Title I, Part A funding for the 2021-22 school year.
No, the LEA received an allocation but does not intend to apply for Title I, Part A funding for the 2021-22 school year.
2. **Does the LEA intend to apply for Title I, Part D funding for the 2021-22 school year?**
Yes, the LEA intends to apply for Title I, Part D funding for the 2021-22 school year.
No, the LEA did not receive an allocation for Title I, Part D funding for the 2021-22 school year.
No, the LEA received an allocation but does not intend to apply for Title I, Part D funding for the 2021-22 school year.
3. **Does the LEA intend to apply for Title II, Part A funding for the 2021-22 school year?**
Yes, the LEA intends to apply for Title II, Part A funding for the 2021-22 school year.
No, the LEA did not receive an allocation for Title II, Part A funding for the 2021-22 school year.
No, the LEA received an allocation but does not intend to apply for Title II, Part A funding for the 2021-22 school year.
4. **Does the LEA intend to apply for Title III, Part A - English Language Learners (ELL) funding for the 2021-22 school year?**
Yes, the LEA intends to apply for Title III, Part A - ELL funding for the 2021-22 school year.
No, the LEA did not receive an allocation for Title III, Part A - ELL funding for the 2021-22 school year.
No, the LEA received an allocation but does not intend to apply for Title III, Part A - ELL funding for the 2021-22 school year.
5. **Does the LEA intend to apply for Title III, Part A - Immigrant Education funding for the 2021-22 school year?**
Yes, the LEA intends to apply for Title III, Part A - Immigrant funding for the 2021-22 school year.
No, the LEA did not receive an allocation for Title III, Part A - Immigrant funding for the 2021-22 school year.
No, the LEA received an allocation but does not intend to apply for Title III, Part A - Immigrant funding for the 2021-22 school year.
6. **Does the LEA intend to apply for Title IV, Part A funding for the 2021-22 school year?**
Yes, the LEA intends to apply for Title IV, Part A funding for the 2021-22 school year.
No, the LEA did not receive an allocation for Title IV, Part A funding for the 2021-22 school year.
No, the LEA received an allocation but does not intend to apply for Title IV, Part A funding for the 2021-22 school year.
7. **Does the LEA intend to apply for Title V - Rural Low Income Student (RLIS) funding for the 2021-22 school year?**
Yes, the LEA intends to apply for Title V, RLIS funding for the 2021-22 school year.
No, the LEA did not receive an allocation for Title V, RLIS funding for the 2021-22 school year.
No, the LEA received an allocation but does not intend to apply for Title V, RLIS funding for the 2021-22 school year.

You may not be the person completing the application, but you should be aware of:



1. What is in the application
2. What the grants can be spent on
3. Ballpark understanding of the amount of each allocation
4. How much can be carried over for each grant

LEA Consolidated Application

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Systems you are associated with	
Show <input type="text" value="100"/> entries	Search: <input type="text"/>
System	Actions
APPR	View Surveys for APPR
Ed Tech	View Surveys for Ed Tech
Education Management Services	View Surveys for Education Management Services
Facilities	View Surveys for Facilities
IDEA	View Surveys for IDEA
Office of Audit Services	View Surveys for Office of Audit Services
Office of Bilingual Education and World Languages	View Surveys for Office of Bilingual Education and World Languages
Office of ESSA-Funded Programs	View Surveys for Office of ESSA-Funded Programs

In the Business Portal - Under SED Monitoring and Vendor Performance System

Inbox (2) ↓		Outbox		
Survey Recipient	Survey	Cycle	Status	Due Date
	CRRSA Act Combined Funding Application	CRRSA ACT	Not Submitted	7/15/2021
	2021-22 Consolidated Application for ESSA-Funded Programs	2021	Not Submitted	8/31/2021

Did you do the CARES Act application?

Remember all the struggles with allocating to the non-publics? Same issues are here.

Check in on the person doing the application to make sure they are addressing all the counts correctly.

Application is 48 pages long. There is a lot included.

Title I Part A - Fiscal Information (Part 2 of 6)

LEAs are requested to complete each item fully and completely. Please respond with "0" as applicable to indicate no funds or if an individual field does not apply to the LEA.

1. Please provide the LEA allocation for Title I, Part A funds for the 2021-22 school year. Do not include carryover funding from the previous year.

	Title I, Part A 2021-22 <u>Allocation</u> (\$)	<u>Transferability</u> Funds <u>to</u> Title I, Part A (\$)	TOTAL FUNDS for Title I, Part A Purposes (Allocation + Transferability) (\$)
Title I, Part A Calculations			

2. Please complete the following chart to determine Per Pupil Amount and Proportionate Share Amounts for Title I, Part A funds.

	Amount (#)
Number of K-12 Resident Students Enrolled in PUBLIC Schools (in-district) (#)	
Number of K-12 Resident Students Enrolled in PRIVATE Schools (in-district) (#)	
Number of K-12 Resident Students Enrolled in PRIVATE Schools (out-of-district) (#)	
Number of students from low-income families who reside in Title I attendance areas and who attend PUBLIC schools (in-district) + Number of students served in Neglected Facilities in the LEA (#)	
Number of students from low-income families who reside in Title I attendance areas and who attend PARTICIPATING PRIVATE SCHOOLS (in-district) (#)	
Number of students from low-income families who reside in Title I attendance areas and who attend PARTICIPATING PRIVATE SCHOOLS (out-of-district) (#)	

3. Based on the information provided above, please find below the Per Pupil Amount, LEA Proportionate Share, and Private School Proportionate Share for Title I, Part A.

	Title I, Part A - <u>Per Pupil</u> <u>Amount</u> (\$)	Title I, Part A - <u>LEA</u> <u>Share</u> (\$)	Title I, Part A - <u>Private</u> <u>School Share</u> (\$)
Proportionate Share Calculations			

Now is the time to start the process so all the meetings with interested parties can occur before the application is due.



Where Can I Get Assistance?

☰ Every Student Succeeds Act (ESSA)

New York State ESSA Plan

2021-2022 Consolidated Application for ESSA-Funded Programs

Assessment and Accountability Waivers

Accountability Designation Materials

Allocations

Complaint Procedures

Fact Sheets

Financial Transparency

Funding Opportunities

Guidance

News and Memos

Parent Dashboard

Programs ▶

Webinars & Videos

2021-2022 Consolidated Application for ESSA-Funded Programs




Executive Summary


NYSED has developed the online 2021-22 Consolidated Application for ESSA-Funded Programs to support the timely administration of ESSA-funded programs to local educational agencies (LEAs) across the state.


[View the full Executive Summary](#) 

ESSA-FUNDED PROGRAMS ONLINE APPLICATION PORTAL 

FORMS 

FISCAL INFO 

TRAINING OPPORTUNITIES 

HELP DESK 



(Please note that the forms below, in addition to being accessible on the online portal, are also accessible to download here. However, they must be saved and submitted through the online application portal, as applicable)

Consolidated Application for ESSA-Funded Programs:

- [2021-2022 Consolidated Application for ESSA-Funded Programs](#) - (for Reference Only)
- [Application Assurances](#)
- [Consultation/Collaboration Documentation Form](#)
- [Title III Consortium Lead Applicant Form](#)
- [Written Affirmation of LEA Consultation with Private School Officials Form](#)
 - [Out of District Private School Letter of Intent - Sample](#)
 - [Within District Private School Letter of Intent - Sample](#)
 - [Private School Consultation Resource](#)
 - [List of 853 and 4201 Schools](#)
- [Neglected and Delinquent Affirmation of Consultation Form](#)
- [Funded Administrative Position Description Form](#)
- [Schoolwide Program Plan Review Form](#)

Consolidated Application Level 1 Addendum:

- [2021-2022 Consolidated Application - Level 1 Addendum \(for Reference Only\)](#)
 - [Background Information](#)
- [2019-20 Accountability Status](#)
- [LEA Access to Portal and User Rights](#)

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TRAINING OPPORTUNITIES 

HELP DESK 



- [Allocations, Poverty Data, and Student Counts](#)
- Project Number Stems:
 - Title I, Part A: 0021-22-XXXX
 - Title I, Part D (New): 0016-22-XXXX
 - Title II, Part A: 0147-22-XXXX
 - Title III, Part A-Immigrant: 0149-22-XXXX
 - Title III, Part A ELL: 0293-22-XXXX
 - Title IV, Part A: 0204-22-XXXX
 - Title V, Part B: 0006-22-XXXX
- Allowable/Unallowable Expenses
 - Title I, Part A: Improving Basic Programs Operated by LEAs
 - Title I, Part A: Homeless Set-aside
 - Title I, Part D: Neglected and Delinquent Programs -revised 5/11/21
 - Title II, Part A: Supporting Effective Instruction
 - Title III, Part A - English Language Learners and Immigrant Students
 - Title IV, Part A - Student Support and Academic Enrichment
- Carryover Limits and Waiver Information
- Private Schools
 - 2020-2021 Funds for Equitable Services to Private Schools Report
 - 2019-2020 Funds for Equitable Services to Private Schools Report
 - 2018-2019 Funds for Equitable Services to Private Schools Report
 - 2017-2018 Funds for Equitable Services to Private Schools Report
- Budget Forms
 - FS-10: Word Version | Excel Version *recommended; please enable macros*
 - FS-10A: Word Version | Excel Version *recommended; please enable macros*
 - Budget Narrative

Current Year 2021-22
Allocations, Allowable/Unallowable Expenditures and Carryover Limits

ALLOCATIONS	PROJECT #	ALLOWABLE/ UNALLOWABLE EXPENDITURES	CARRYOVER LIMITS
Title I, Part A - Preliminary <ul style="list-style-type: none"> Child Counts of Children in Poverty Child Counts for Institutions for the Neglected 	0021-22-XXXX	Title I Part, A  Title I, Part A (Homeless) 	Title I, Part A
<u>Title I, Part D - Preliminary</u> <ul style="list-style-type: none"> Facility Level 	0016-22-XXXX	Title I, Part D 	Title I, Part D
Title II, Part A - Preliminary	0147-22-XXXX	Title II, Part A 	Title II, Part A
Title III, Part A - ELL - coming soon	0293-22-XXXX	Title III, Part A - ELL 	Title III, Part A - ELL
Title III, Part A - Immigrant - coming soon	0149-22-XXXX	Title III, Part A - Immigrant 	Title III, Part A Immigrant
Title IV, Part A - Preliminary	0204-22-XXXX	Title IV, Part A 	Title IV, Part A
Title V, Part B	0006-22-XXXX		Title V, Part B



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HELP DESK 



The Office of ESSA-Funded Programs is pleased to announce a new monthly Office Hours Series to begin on Thursday, February 4, 2021. During this Office Hour Session, participating grantees may connect with ESSA-Funded Programs staff through Zoom or by phone to ask questions or seek clarifications about the identified topic for the session.

The full schedule of sessions and links to access these sessions is below:

Office Hours Schedule

DATE/TIME	TOPIC	LOGIN INFORMATION/FAQs
February 4, 2021: 11:00AM	Equitable Services	
March 4 2021: 11:00AM	Consolidated Application for ESSA- Funded Programs	
April 1, 2021: 11:00AM	Allocations	Frequently Asked Questions
May 6, 2021: 11:00AM	Open Q&A	
June 3, 2021: 11:00AM	ESSA Programs TBD	<i>CANCELLED</i>
June 8, 2021: 11:00 AM	2021-22 Consolidated Application for ESSA- Funded Programs	PreRecorded Webinar

Submittal Instruction and Deadlines

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Directions for Submitting the Application:

The online application may only be submitted/certified by the chief school officer of the applicant LEA. The designated superintendent (public school LEAs) or the chief executive officer, board of trustees president, or school employee designated by the board of trustees (charter school LEAs), are the only administrators with the submit/certify rights necessary to successfully submit and certify a completed application for NYSED review.

LEAs are NOT REQUIRED to send hard copies of general application materials to the Department.

LEAs are REQUIRED to send signed originals and two hard copies of each FS-10 Budget Form to:

Office of ESSA-Funded Programs - Rm 320 EB

RE: 2021-22 Consolidated Application for ESSA-Funded Programs

New York State Education Department

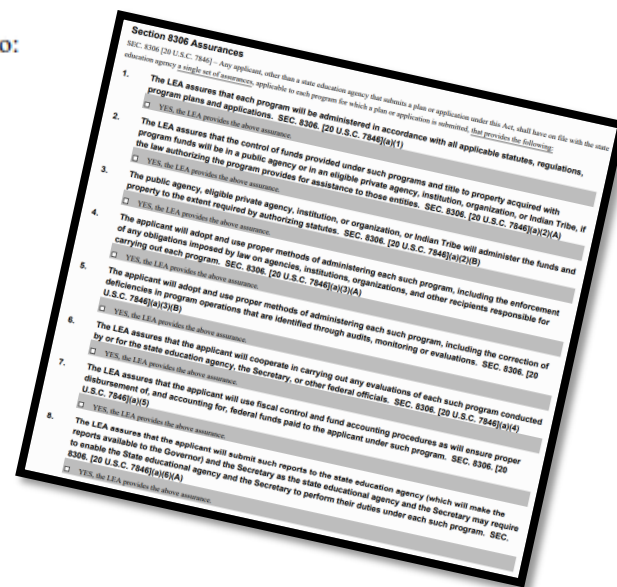
89 Washington Avenue

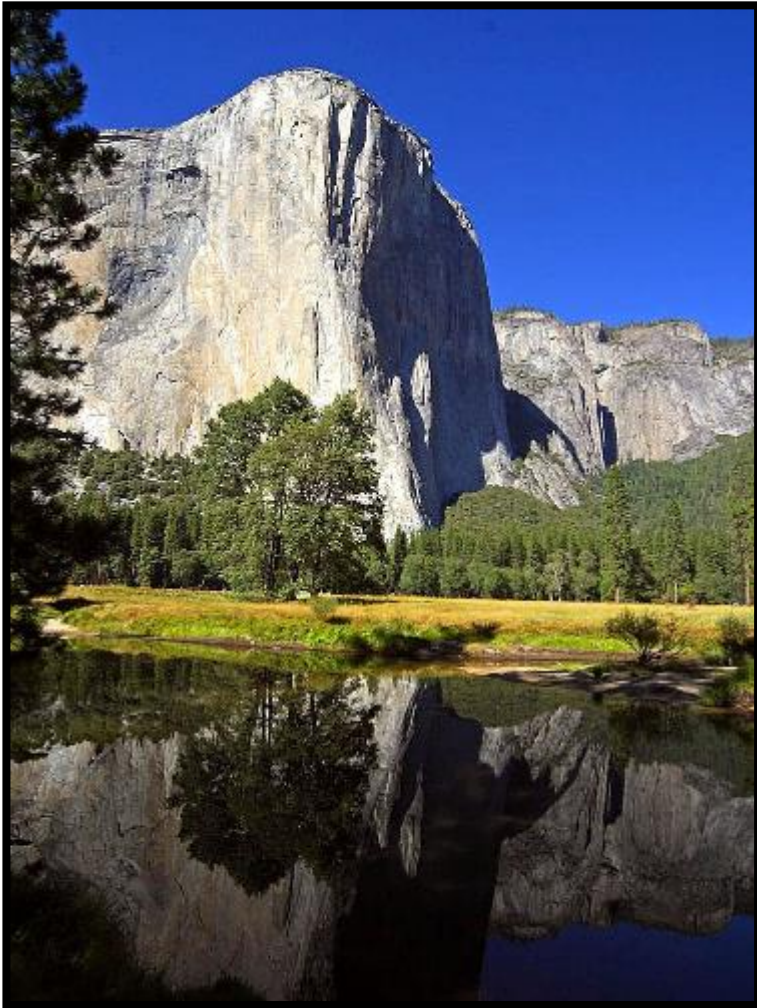
Albany, NY 12234.

Deadline for Submitting the Applications:

The 2021-22 Consolidated Application for ESSA-Funded Programs is due by August 31, 2021.

Signed Budget documents must be postmarked by no later than August 31, 2021.





Before someone starts the Consolidated Application – it is like looking up El Capitan before you start your climb

Once the Consolidated Application is done is like....



View of Bridalveil Falls



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Digging into the Tax Levy and Tax Warrant

What a SBO May Need to Know

Tax Collection Process



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- ❑ Phase 1 – Resolution to Confirm Tax Rolls & Authorize the Tax Levy (RPT §1312)
- ❑ Phase 2 – Tax Warrant (RPT §1306-1)
- ❑ Phase 3 – Collector's Report (RPT §1330-1)
- ❑ Phase 4 – Resolution to Authorize Filing of Return Tax Claims (RPT §1330)

- ❑ Samples available:
<http://www.p12.nysed.gov/mgtserv/taxation/SchTaxProced.htm>

Article 13 SPECIAL PROVISIONS RELATING TO SCHOOL DISTRICTS

- 1300 Definitions.
- 1302 Use of city, town or county assessment roll.
- 1304 Apportionment of assessments.
- 1306 Levy of taxes.
- 1306-A Effect of school tax relief (STAR) exemption upon school district taxes; state aid.
- 1308 Property subject to levy.
- 1312 Tax lien.
- 1314 Equalization in school districts located in more than one city or town.
- 1316 Alternative school tax apportionment.
- 1318 Collecting officer's warrant; delivery thereof.
- 1320 Undertaking of collecting officer.
- 1322 Collecting officer's notice in districts other than city school districts.
- 1324 Collecting officer's notice in city school districts.
- 1325 Collecting officer in school district; third party notification notice.
- 1326 Payment of taxes in installments in city school districts.
- 1326-A Payment of taxes in installments in certain school districts.
- 1326-B Payment of taxes in installments in certain school districts affected by floods or natural disasters.
- 1327 Payment of taxes in installments in city school districts by senior citizens and physically disabled persons.
- 1328 Collecting officer's fees; interest.
- 1330 Enforcement of taxes in districts other than city school districts.
- 1332 Enforcement of taxes in city school districts.
- 1334 Right of action to recover tax.
- 1335 Supplemental assessment roll of real property in a school district other than a school district which is wholly or partly within a city.
- 1336 Collection of taxes in installments in school districts other than city school districts; method of election; certification.
- 1338 Statement of taxes to be mailed.
- 1340 Owner of real property may elect to pay school district taxes in installments.
- 1342 Payment by county treasurer.

Real Property Tax Laws for School Districts

Did You Know?



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It is imperative that the minutes of the Board of Education **record the date and hour that the Board adopts the resolution to authorize the tax levy** as it is this action that fixes the time when the school taxes become a lien against the property.

Section 1312 of Real Property Tax Law states that "School taxes shall become a lien as of the date and hour of the confirmation or final adoption of the school tax roll by the school authorities."

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ANYTOWN CENTRAL SCHOOL DISTRICT													
2	TAX RATES													
3	for the 2001-02 School Year													
4	Erin Thomas Brennan													
5	Enter information in blue fields only. Other fields contain formulas.													
6														
7		Total	STAR	STAR				2001-02	2001-02					
8		Assessed	Exempt	Exempt	Equalization	True	Percent	School	Tax Rate	2000-01	Dollar	Percent	Average	Average
9	Town	Value	Assessment	Revenue	Rate(1&2)	Value	of Levy	Levy	per \$1,000	Tax Rate	Amount	Tax Rate	Tax Bill	Tax Bill
10				=C/1000 * I		=B/E	=F/F20	=G * H20	of Assessed	per \$1,000	Increase	Increase	w/o STAR	with STAR
11									(H/B) * 1000		I-J	K/J	(100*E) * I	(70*E) * I
12	Anytown-City	\$ 284,946,425	\$ 35,992,633	\$ 1,266,714.82	55.73%	\$ 511,298,089	20.470%	\$10,028,326.03	\$ 35.19372	33.632717	1.56	4.64%	\$1,961.35	\$1,372.94
13	Anytown-Town	585,891,614	84,047,361	\$ 3,184,802.36	47.97%	1,221,370,886	48.899%	\$23,955,312.40	\$ 40.88694	37.892949	2.99	7.90%	\$1,961.35	\$1,372.94
14	Southville	226,992,570	30,911,124	\$ 2,072,386.76	29.69%	764,542,169	30.609%	\$14,995,319.37	\$ 66.06084	67.043397	-0.98	-1.47%	\$1,961.35	\$1,372.94
15														
16	Northtown	539,000	42,460	\$ 826.88	101.23%	532,451	0.021%	\$ 10,443.21	\$ 19.37516	19.474253	-0.10	-0.51%	\$1,961.35	\$1,372.94
17														
18	Total	\$1,098,369,609	\$ 150,993,578	\$ 6,524,730.82		\$2,497,743,595	100.000%	\$48,989,401.00						
19														
20								\$ 0.01						
21								math check						
22														
23														
24														
25					2001-02	2000-01	inc. (dec.)							
26					19.613	19.295	1.650%							
27					True Value Tax Rate									
28					Estimated State Aid	\$ 65,231,738								
29	Enter information in blue fields only. Other fields contain formulas.													
30														
31	Notes:													
32	1.	Equalization Rates and Assessed Values are subject to change any time before the tax warrant is approved by the Board.												
33	2.	the "Average Tax Bill" is based on a home with a market value (true value) of \$100,000.												
34	3.	STAR value for "Average Tax Bill" is based on Basic STAR exemption of \$30,000 true value.												
35	4.	As home values increase the % of the STAR exemption decreases.												

Always Good to Ask Someone Else to Double-Check Your Calculations

45



&



Recommendations

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□ Verify the answers to your questions:

- School Law Book – Chapter 22
- Check with your attorney
- Ask another district/BOCES
- Check with your assessor
- Check against what was done in the past
- Consider that processes can be different between types of school districts and counties the district is located



Other Tax Related Items

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- ❑ Need to submit school tax rates to:
- ❑ Website: <https://www.tax.ny.gov/pit/property/star/send-expected-school-tax-rate.htm>
 - ❑ Template is available
 - ❑ Report rates per \$1,000 of assessed value and carried out to six decimal places
 - ❑ Due not less than 30 days before the tax levy
 - ❑ Used to calculate STAR and property tax credits
- ❑ Email information to:
 - ❑ School.taxrates@tax.ny.gov



Questions?

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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 for 2021-22:

Tuesday 8/24/21

Wednesday 9/22/21, 10/20/21,
11/17/21, 12/15/21, 1/19/22, 2/16/22,
3/23/22, 4/20/22, 5/18/22, 6/22/22