



ANNUAL REPORTING CALENDAR

Listed by USBE Section

Abstract

This document is provided as a resource to assist schools in meeting obligatory reporting requirements. This report is divided up according to USBE Section. Each section is designed to print on its own page for easy distribution to individuals responsible for those reports. Although every effort is made to produce an accurate report, the school is ultimately responsible to be aware of reporting requirements and due dates and ensure timely submission of all required reports.

Cisneros, Rebecca
Rebecca.Cisneros@schools.utah.gov

Annual Reporting Calendar (by section)

SY 2018-2019

6/25/2018

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Finance Related Reports			
Due Date	Report	Contact	Notes
July			
1st	Annual Assurances	Kirin McInnis kirin.mcinnis@schools.utah.gov USBE Finance 801-538-7674	Signed by the Director; must be done before current year funds are expended. Not in UCA for 2018-2019 school year. A fillable PDF will be sent to all directors.
NLT July 22	File final budget for last year and original budget for current year to the Utah State Auditor and USBE	Patricia Nelson State Auditor's Office 801-538-1334 Von Hortin von.hortin@schools.utah.gov USBE Finance 801-538-7802	Submit to USBE via UPEFS. 53G-7-303(5) makes budgets due within 30 days after adoption. Upload to State Auditors website no later than 30 days after adoption. Note: the State Auditor will withhold all State funding sources if the Charter schools become delinquent in their reporting.
30 th	Utah Public Finance (Transparency) Website Submission	Darrell Swenson State Division of Finance 801-538-3059	For schools with annual revenues or expenses greater than \$500,000. Quarter Revenue & Expenses must be uploaded within 30 days, except at year end. Note: the State Auditor will withhold all State funding sources if the Charter schools become delinquent in their reporting. Recently, the Auditor has decided this includes being delinquent in reporting to Transparency.
31st	Deposits and Investments Report to the State Money Management Council	Ann Pedroza Money Management Council 801-538-1883	Money Management Council Website
31 st	File DWS wage report for prior quarter		
August			
September			
15 th	Student Membership Audit for prior year	Kirin McInnis kirin.mcinnis@schools.utah.gov USBE Finance 801-538-7674	To be conducted by an independent auditor and submitted by your auditor to the attention of USBE Finance. The auditor must follow the procedures listed in the Guide for Agreed-Upon Procedures Engagements for Local Education Agencies.
30 th	Utah Public Finance (Transparency) Website Submission: Annual Payroll Data	Darrell Swenson State Division of Finance 801-538-3059	For schools with annual revenues or expenses greater than \$500,000. Must be uploaded within 90 days after year end. Note: the State Auditor will withhold all State funding sources if the Charter

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Finance Related Reports			
			schools become delinquent in their reporting. Recently, the Auditor has decided this includes being delinquent in reporting to Transparency.
October			
1 st	UPEFS, which includes Annual Financial Report (AFR) and Annual Program Report (APR) for prior year	<p>Von Hortin von.hortin@schools.utah.gov USBE Finance 801-538-7670</p> <p>Emily Britton State Auditor's Office 801-310-0803</p>	Submit to USBE via UPEFS. Upload the AFR to State Auditors website no later than 180 days after year end. Note: the State Auditor will withhold all State funding sources if the Charter schools become delinquent in their reporting. Recently, the Auditor has decided this includes being delinquent in reporting to Transparency.
30 th	Utah Public Finance (Transparency) Website Submission	Darrell Swenson State Division of Finance 801-538-3059	
30 th	File DWS wage report for prior quarter		
November			
1 st	Utah Consolidated Application (UCA)	UCA helpdesk at 801-538-7604.	Online application available at https://www.uca.schools.utah.gov . Call the UCA help desk for username / password and technical assistance. Online Application and LEA Planning Tool must be complete.
1 st	Fall Enrollment & Transfer Student Documentation Audit Report	Kirin McInnis kirin.mcinnis@schools.utah.gov USBE Finance 801-538-7674	To be conducted by an independent auditor and submitted by your auditor to the attention of USBE Finance. The auditor must follow the procedures listed in the Guide for Agreed-Upon Procedures Engagements for Local Education Agencies.
15 th	Educator salary adjustments per information in CACTUS	<p>Cory Kanth Cory.kanth@schools.utah.gov USBE Finance 801-538-7660</p> <p>Travis Rawlings travis.rawlings@schools.utah.gov USBE Teaching & Learning 801-538-7601</p>	These reports provide the basis for school allocations of funding to be used toward educator salary adjustments, professional staff cost, and classroom supplies and materials. Schools need to ensure their teacher data (including FTEs, assignments, experience, and degrees) is correct before this date.
29 th	Management Letters and Management Response Letters for prior year	Von Hortin von.hortin@schools.utah.gov USBE Finance 801-538-7670	

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Finance Related Reports			
29 th	Single Audit Report for prior year (if applicable)	Von Hortin von.hortin@schools.utah.gov USBE Finance 801-538-7670	All non-Federal entities that expend \$500,000 or more of Federal awards in a year are required to obtain an annual audit in accordance with the Single Audit Act.
30 th	Audited Financial Statements prior year	Von Hortin von.hortin@schools.utah.gov USBE Finance 801-538-7670	Submit to USBE (will need to be uploaded to the State Auditors website by December 31st).
December			
15 th	Completion of the Indirect Cost Information in UPEFS	Von Hortin von.hortin@schools.utah.gov USBE Finance 801-538-7670	Complete if the school wants to have an Indirect Cost Rate prepared for the following year.
31 st	Audited Financial Statements for operating schools; Financial Certification	Kylie Cone State Auditor's Office 801-538-1364 Patricia Nelson State Auditor's Office 801-538-1334	Upload to State Auditors website, due 180 days after year end. For Nonoperating charters: AFR and Agreed-Upon Procedures are due to State Auditor. Note: the State Auditor will withhold all State funding sources if the Charter schools become delinquent in their reporting.
January			
30 th	Utah Public Finance (Transparency) Website Submission	Darrell Swenson State Division of Finance 801-538-3059	For schools with annual revenues or expenses greater than \$500,000. Quarter Revenue & Expenses must be uploaded within 30 days, except at year end. Note: the State Auditor will withhold all State funding sources if the Charter schools become delinquent in their reporting. Recently, the Auditor has decided this includes being delinquent in reporting to Transparency.
31 st	Deposits and Investments Report to the State Money Management Council	Ann Pedroza Money Management Council 801-538-1883	Data as of December 31. Request for report sent from Treasurer's office. Report sent to: Utah Money Management Council, PO BOX 142315, S.L.C., UT 84114-2315 or by email attachment to mmcouncil@utah.gov .
31 st	File DWS wage report for prior quarter		

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Finance Related Reports			
February			
March			
April			
30 th	Utah Public Finance (Transparency) Website Submission	Darrell Swenson State Division of Finance 801-538-3059	For schools with annual revenues or expenses greater than \$500,000. Quarter Revenue & Expenses must be uploaded within 30 days, except at year end. Note: the State Auditor will withhold all State funding sources if the Charter schools become delinquent in their reporting. Recently, the Auditor has decided this includes being delinquent in reporting to Transparency.
31st	File DWS wage report for prior quarter		
May			
June			
30 th	Budget Adopted by governing board		See SB 124 - Effective January 1, 2019, deadline for adopting LEA's budget for next fiscal year is June 30

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Data & Statistics Related Reports			
Due Date	Report	Contact	Notes
July			
10 th	Year End UTREx/Data Clearinghouse upload	For Technical Assistance: 801-538-7800 option 2 or utrexhelp@schools.utah.gov For Other Assistance: Malia McIlvenna malia.mcilvenna@schools.utah.gov USBE Data & Statistics 801-538-7731	Upload then inspect file. Instructions and submissions are at the datagateway.schools.utah.gov/UTREx
August - September			
October			
10 th	UTREx/Data Clearinghouse File Upload for Fall Enrollment	For Technical Assistance: 801-538-7800 option 2 or utrexhelp@schools.utah.gov For Other Assistance: Malia McIlvenna malia.mcilvenna@schools.utah.gov USBE Data & Statistics 801-538-7731	
10 th	Graduation/Exit completion code updates for the previous school year are due	Randy Raphael Randy.Raphael@schools.utah.gov USBE Data & Statistics 801-538-7908	Verify prior year exit codes for students in grades 9-12 to confirm graduation, dropout, or continuing enrollment. There are no extensions given. Training is available at: Graduation Training
10 th	Special Ed Single Year Dropout/Event Dropout updates for the previous school year are due	Lavinia Gripentrog lavinia.gripentrog@schools.utah.gov USBE Special Education 801-538-7645 Malia McIlvenna malia.mcilvenna@schools.utah.gov USBE Data & Statistics 801-538-7731	Verify prior year exit codes for students in grades 7-12 in Special Education identified as single year (event) dropouts. There are no extensions given. Training documentation is available by request.
November			
December			
10 th	UTREx/Data Clearinghouse File Upload for December 1 Child Count enrollment report (SCRAM)	For Technical Assistance: 801-538-7800 option 2 or utrexhelp@schools.utah.gov For Other Assistance: Malia McIlvenna malia.mcilvenna@schools.utah.gov USBE Data & Statistics 801-538-7731	Upload then inspect file. Instructions and submissions are at the datagateway.schools.utah.gov/UTREx

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Student Data Privacy Related Reports			
Due Date	Report	Contact	Notes
July			
1 st	Enter all student data elements shared with third parties into the Board's Meta Data Dictionary	David Sallay David.sallay@schools.utah.gov USBE Data Privacy Auditor 801-538-7758	LEA will certify that it is complete as of Oct 1 st and provide a description of the process used to collect the list of vendors and data elements.
August			
1 st	Email name of data manager	David Sallay David.sallay@schools.utah.gov USBE Data Privacy Auditor 801-538-7758	Each year, designate an individual to act as a student data manager to fulfill the responsibilities of a student data manager
September			
October			
1 st	Provide the Superintendent a copy or link to the LEA's Data Governance Plan & Information Technology Systems Security Plan.	David Sallay David.sallay@schools.utah.gov USBE Data Privacy Auditor 801-538-7758	Send link or plan via email.
No Specific Dates			
Annually	Publicly post the LEA's definition of directory information and describe how a student data manager may share personally identifiable information that is directory information.	David Sallay David.sallay@schools.utah.gov USBE Data Privacy Auditor 801-538-7758	
Annually	Provide training regarding the confidentiality of student data to any employee with access to education records as defined in FERPA. Send materials used for trainings and the date in which it was accomplished.	David Sallay David.sallay@schools.utah.gov USBE Data Privacy Auditor 801-538-7758	School employees annually submit a certified statement to the LEA's student data manager, certifying that the school employee completed the LEA's required student privacy training and understands student privacy requirements.

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Student Advocacy Services (SAS)/Federal Programs Related Reports			
Due Date	Report	Contact	Notes
July			
16 th	Check the Out of School Youth (OOSY) Report for students earning a GED or an Adult Education Carnegie unit diploma (if applicable)	Brian Olmstead brian.olmstead@schools.utah.gov USBE Adult Education 801-538-7824	The OOSY Report may be accessed via a link in UTREx. It lists the names and completion data for out-of-school youth who successfully completed the GED or an adult education diploma during that same program year. These students may currently be listed as a dropout; it is up to the LEA to update any of their student statuses to completer or graduate.
30 th	Title 1 Reimbursement	Sandi Grant Sandra.grant@schools.utah.gov USBE Federal Programs 801-538-7844	Last date for reimbursement request for time period up-to and including June 30 th .
August			
1 st	Drop Out Report grades 9-12	Corby Eason Corby.eason@schools.utah.gov Student Advocacy Services 801-538-7863	Sent via Survey Monkey or the Data Gateway. Report for the previous year. See R277-606-4
September			
18 th	Check the Out of School Youth (OOSY) Report for students earning a GED or an Adult Education Carnegie unit diploma (if applicable)	Brian Olmstead brian.olmstead@schools.utah.gov USBE Adult Education 801-538-7824	The OOSY Report may be accessed via a link in UTREx. It lists the names and completion data for out-of-school youth who successfully completed the GED or an adult education diploma during that same program year. These students may currently be listed as a dropout; it is up to the LEA to update any of their student statuses to completer or graduate.
October			
1 st	Cactus Verification of Licensed School Counselors for Board Ratio Report	Kim Herrera Kim.herrera@schools.utah.gov School Counseling Program Specialist 801-538-7647 Holly Todd Holly.Todd@schools.utah.gov School Counseling Program Specialist 801-538-7643	In accordance to R277-462, USBE staff is required to gather information regarding counselor to student ratios by LEA and report this information to USBE. LEAs not meeting the recommended school counselor to student ratio of 1:350 or better, as an average, are required to submit a plan, by May 1, for how they intend to meet this ratio. The report is completed using data collected as of October 1 student enrollment and licensed school counselor FTE counts in CACTUS.
3 rd – 10 th	Download the Out of School Youth (OOSY) report and update SIS prior to October UTREx submission (if applicable)	Brian Olmstead brian.olmstead@schools.utah.gov USBE Adult Education 801-538-7824	The OOSY Report may be accessed via a link in UTREx. It lists the names and completion data for out-of-school youth who successfully completed the GED or an adult education diploma during

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Student Advocacy Services (SAS)/Federal Programs Related Reports			
			that same program year. These students may currently be listed as a dropout; it is up to the LEA to update any of their student statuses to completer or graduate. This is the final OOSY Report with cumulative data from 7/1 to 9/30.
15 th	Cactus Verification of Licensed School Counselors for Board Ratio Report	<p>Kim Herrera School Counseling Program Specialist 801-538-7647</p> <p>Holly Todd School Counseling Program Specialist 801-538-7643</p>	Recipients of the SBMH grant must submit the annual Accountability Report for each school receiving funding which indicates the hiring of qualified personnel.
30 th	Title I Reimbursement	<p>Sandra Grant sandra.grant@schools.utah.gov USBE Title I Programs 801-538-7704</p>	Last date for reimbursement request for time period up-to and including September 30 th
30 th	Deadline for Finalized Drop Out Report grades 9-12	<p>Corby Eason Corby.eason@schools.utah.gov Student Advocacy Services 801-538-7863</p>	Sent via Survey Monkey or Data Gateway. Report for the previous year. See R277-606-4
30 th	Grant for School Based Mental Health (SBMH) Services Recipient Accountability Report	<p>Sandra Grant sandra.grant@schools.utah.gov USBE Title I Programs 801-538-7704</p>	Last date for reimbursement request for time period up-to and including September 30 th
November			
15 th	Title I Waiver Request	<p>Sandra Grant sandra.grant@schools.utah.gov USBE Federal Programs 801-538-7844</p>	Waiver request for carryover greater than 15% due
December			
1 st	Annual Title I Desktop monitoring instrument (DMI) (for all LEAs who accept Title I, Title III, or SIG funds)	<p>Sandra Grant sandra.grant@schools.utah.gov USBE Title I Programs 801-538-7704</p> <p>Val Murdock val.murdock@schools.utah.gov USBE Title I Programs 801-538-7975</p>	
January			
February			

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Student Advocacy Services (SAS)/Federal Programs Related Reports			
March			
April			
May			
1st	Program Self-Evaluation	<p>Kim Herrera School Counseling Program Specialist 801-538-7647</p> <p>Holly Todd School Counseling Program Specialist 801-538-7643</p>	An annual self-evaluation, using the performance review document , is an online survey that is required annually for all schools as part of the school counseling program funding process. The survey link is available from April 1 – May 1 of each school year.
1 st	Electronic Report of Interim Reviews	<p>Kim Herrera School Counseling Program Specialist 801-538-7647</p> <p>Holly Todd School Counseling Program Specialist 801-538-7643</p>	Approved school counseling programs are required to submit an Interim Review Report every 3-years.
1 st	New Schools Letter of Intent	<p>Kim Herrera School Counseling Program Specialist 801-538-7647</p> <p>Holly Todd School Counseling Program Specialist 801-538-7643</p>	New schools requesting school counseling program funding must submit a letter of intent by May 1. Refer to Chapter 5 of the Utah College and Career Readiness School Counseling Program Model for further guidance.
June			
1 st	Request for Funding (RFF)	<p>Kim Herrera School Counseling Program Specialist 801-538-7647</p> <p>Holly Todd School Counseling Program Specialist 801-538-7643</p>	Funding appropriated by the Utah State Legislature for the continuation of the School Counseling Program will be available to districts through the RFF application process. The school districts or charter schools will receive continued support from this funding source provided by the Utah State Legislature through the Utah State Board of Education based upon performance and adherence to the standards cited in Utah State Board of Education Rule R277-462-3. Disbursement criteria shall remain consistent with the enrollment allocations and priority for funding noted in R277-462-3.
1 st	Data Projects	<p>Kim Herrera School Counseling Program Specialist</p>	Schools receiving Utah College and Career Readiness School Counseling Program funds are required to submit a

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Student Advocacy Services (SAS)/Federal Programs Related Reports			
		801-538-7647 Holly Todd School Counseling Program Specialist 801-538-7643	data project to the USBE using the data project template .
15 th	Grant for School Based Mental Health (SBMH) Services Recipient Accountability and Data Report	Kim Herrera School Counseling Program Specialist 801-538-7647 Holly Todd School Counseling Program Specialist 801-538-7643	Recipients of the SBMH grant must submit the annual Accountability and Data Report for each school receiving funding which indicates outcomes based on identified goals.
30 th	Reporting and Incident Investigations of Allegations of Bullying, Cyber-bullying, Hazing, and Retaliation	Corby Eason Corby.eason@schools.utah.gov Student Advocacy Services 801-538-7863	Sent via Survey Monkey. See Board Rule R277-613-5
30 th	504 Reports (although not technically SPED, this report is filed via the UPIPS system)	Holly Bell Holly.Bell@schools.utah.gov USBE Student Advocacy Services 801-538-7828	According to Board Rule R277-753, there are two reports due June 30th every year. One report reflects 504 students receiving services that costs money to provide necessary supports. The other report is to identify the number of students on 504s and their corresponding disability category(ies) as well as their entry/exit dates that we should be able to pull from UTrex and LEAs should not have to submit.

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Teaching & Learning/Licensing Related Reports			
Due Date	Report	Contact	Notes
July			
31 st	Applications for Alternative Routes to Licensure (ARL) program due July 31st	Kathy Webb Kathy.webb@schools.utah.gov USBE Teaching & Learning 801-538-7736	Applications for new ARL candidates (applying individually) for the upcoming school year are accepted March 1 - July 31. ARL will accept applications at any time if the LEA contacts the office and informs them that they are hiring or are interested in hiring the individual. Application found at Licensing applications
August			
15 th	Pre-approval due date for Early Literacy Program Plan	Jennifer Thronsen Jennifer.thronsen@schools.utah.gov PreK-12 Literacy Coordinator 801-538-7893 Sara Wiebke Sara.wiebke@schools.utah.gov K-3 Literacy Specialist 801-538-7935	The 18-19 Application will be emailed to all Literacy Directors and Curriculum Directors and uploaded into the UCA. Pre-approval is not required, but may be useful in ensuring the plan meets the new requirements per 53F-2-503 as described in LIT trainings.
September			
15 th	IB Applications for funding associated with the IB program	Garret Rose Garret.Rose@schools.utah.gov USBE Teaching & Learning 801-538-7616	Early College Webpage
15 th	Assurance and Expenditure forms due (for schools offering Concurrent Enrollment)	Garret Rose Garret.Rose@schools.utah.gov USBE Teaching & Learning 801-538-7616	Early College Webpage
October			
	Letter of Information to send to parents by schools participating in the STEM Action Center	Kellie Yates kellieyates@utah.gov STEM Education Liaison and Program Specialist Governor's Office of Economic Development 801-538-8765	Schools participating with the STEM Action Center will receive a Letter of Information by October to send to parents letting them know that their child is involved in a project paid for by the legislature and that they have the option to opt out of having their data included in the analysis.
1 st	Final due date for Early Literacy Program Plan	Jennifer Thronsen Jennifer.thronsen@schools.utah.gov PreK-12 Literacy Coordinator 801-538-7893 Sara Wiebke Sara.wiebke@schools.utah.gov K-3 Literacy Specialist 801-538-7935	The 18-19 Application will be emailed to all Literacy Directors and Curriculum Directors and uploaded into the UCA. Per 53F-2-503, plans are required to have been approved by the LEAs local board in an open, public meeting prior to submission on Oct. 1. Failure to meet due dates per Board Rule R277-406, will result in ineligibility for Early Literacy funds.

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Teaching & Learning/Licensing Related Reports			
1st	Final Deadline to Complete CACTUS update (teaching assignments entered)	Erica Horsley erica.horsley@schools.utah.gov USBE Teaching & Learning 801-538-7741	All information should be correct and complete in CACTUS, including removal of teachers not returning.
31st	Annual Criticality Survey	Travis Rawlings or Erica Horsley USBE Teaching & Learning 801-538-7741	
November			
	Teacher surveys completed by schools participating in the STEM Action Center	Kellie Yates kellieyates@utah.gov STEM Education Liaison and Program Specialist Governor's Office of Economic Development 801-538-8765	
15 th	Professional Staff Cost Report	Travis Rawlings travis.rawlings@schools.utah.gov USBE Teaching & Learning 801-538-7601	for New Charter Schools per information in CACTUS Report for Classroom Supplies and Materials per information in CACTUS Qualified Teachers
15 th	Letter of Authorizations (for any teacher that started at the beginning of the school year)	Stephanie Ferris stephanie.ferris@schools.utah.gov USBE Teaching & Learning 801-538-7752	Form and fees must be received in Teaching & Learning Section and authorization request entered in CACTUS. Employee should already be claimed in CACTUS. For individuals hired after Nov. 1 the LEA has 30 days from hire to request and pay for the authorization.
24 th	New course submissions for schools offering Concurrent Enrollment	Cyd Grua Utah System of Higher Education 801-321-7152 Garret Rose Garret.rose@schools.utah.gov USBE Teaching & Learning 801-538-7742	
December			
January			
February			
16 th	Progress and Observation forms for all ARL teachers	Kathy Webb kathy.webb@schools.utah.gov USBE Teaching & Learning 801-538-7858 or 7834	ARL teacher sends the Progress form, Principal sends the Observation form. Principal must sign both forms. Forms are sent to USBE. (ARL mails the forms to principal & teacher beforehand.)

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Teaching & Learning/Licensing Related Reports			
March			
1 st	Applications for Alternative Routes to Licensure (ARL) program accepted from now until July 31st	Kathy Webb kathy.webb@schools.utah.gov USBE Teaching & Learning 801-538-7858 or 7834	Applications for new ARL candidates for the upcoming school year are accepted from the individual from March 1 - July 31. Application found at http://www.schools.utah.gov/cert/DOCS/APT/altapplication.aspx
April			
	Student post-survey by schools participating in the STEM Action Center	Kellie Yates kellieyates@utah.gov STEM Education Liaison and Program Specialist Governor's Office of Economic Development 801-538-8765	
15 th	Final deadline to submit Letter of Authorizations	Stephanie Ferris stephanie.ferris@schools.utah.gov USBE Teaching & Learning 801-538-7752	For employees hired after November 15 schools have 30 days from hire to submit a Letter of Authorization.
May			
	Teacher post-survey by schools participating in the STEM Action Center	Kellie Yates kellieyates@utah.gov STEM Education Liaison and Program Specialist Governor's Office of Economic Development 801-538-8765	
	SSID collection for schools participating in the STEM Action Center	Kellie Yates kellieyates@utah.gov STEM Education Liaison and Program Specialist Governor's Office of Economic Development 801-538-8765	SSIDs of students who have used products through the end of April.
1 st	Begin CACTUS Educator assignment data finalization for school year just ended, non-returning educators terminated in CACTUS	Travis Rawlings travis.rawlings@school.utah.gov USBE Teaching & Learning 801-538-7601	Year-end update of teacher information into the CACTUS database. Extracted data used to fund the Professional Staff Cost formula, and to publish the average salaries, FTE counts, and staffing ratios.
9 th	Teacher Salary Supplement Program approvals for 3rd Trimester, 2nd Semester and all Annual applications	Jane Conway jane.conway@schools.utah.gov USBE Teaching & Learning 801-538-7580	Must be reviewed and approved by the LEA starting May 2nd and completed no later than 5 p.m. May 9th. See https://tssp.schools.utah.gov/handler
June			
30 th	Complete CACTUS update	Erica Horsley erica.horsley@schools.utah.gov	All information should be correct and complete in CACTUS, including removal of

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Teaching & Learning/Licensing Related Reports

		USBE Teaching & Learning 801-538-7741	teachers not returning for the next school year.
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Special Education Related Reports			
Due Date	Report	Contact	Notes
July			
August			
15 th	DLM Educator Portal opens for Teacher account clean-up	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education 801-538-7887	Coordinators should update teacher accounts for accuracy before they get uploaded to the Moodle training site.
22 nd	DLM Teacher Moodle Training open	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education 801-538-7887	Teachers can access the DLM Moodle training site to complete required yearly training. This must be done first to gain access to their Educator Portal KITE account to view student accounts.
September			
19 th	DLM Instructionally Embedded Assessment window open	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education 801-538-7887	Students who are eligible for the alternate assessment must have 1% marked within their special education record (SCRAM) and be enrolled in an appropriate course. Testing Window September 19 - February 27. Students can be assessed anytime during the window.
30 th	Last day to obligate IDEA funds from prior FY	Neil Stevens Neil.stevens@schools.utah.gov USBE Special Education 801-538-7819	This is the last day the LEA may spend IDEA funds that were available beginning July 1.
30 th	Extended Year for Special Educator (EYSE) Stipends Report	Cole Shakespear Cole.Shakespear@schools.utah.gov USBE Special Education 801-538-7576	For days worked during the 2 weeks before the school year begins. Submitted within UPIPS.
30 th	CEIS Report	Neil Stevens Neil.stevens@schools.utah.gov USBE Special Education 801-538-7819	Required for any LEAs that used funds for CEIS during 2015-2016, 2016-2017, or 2017-2018. Submitted within UPIPS.
30 th	Special Education Dispute Resolution	Emily Bytheway emily.bytheway@schools.utah.gov USBE Special Education 801-538-7884	Verify the report received from the USBE Special Education section (in UPIPS) of the number of dispute resolutions in prior SY.
October			
7 th	Policy and Procedure Manuals for Special Education	Lindsey Adams lindsey.adams@schools.utah.gov Special Education 801-538-7806	
31 st	Last Day to Request Reimbursement on FY16 IDEA	Neil Stevens Neil.stevens@schools.utah.gov USBE Special Education 801-538-7819	This is the last day the LEA may request reimbursement in the UCA for IDEA funds that were available beginning July 1, 2016.
November			

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Special Education Related Reports			
1 st	Application for IDEA Funds	Neil Stevens Neil.stevens@schools.utah.gov USBE Special Education 801-538-7819	The IDEA sections of the UCA must be complete. This includes MOE assurance, Excess Costs, USIMAC, and CEIS plans.
December			
10 th	UTREx/Data Clearinghouse File Upload for December 1 Child Count enrollment report (SCRAM)	For Technical Assistance: 801-538-7800 option 2 or utrexhelp@schools.utah.gov Other Assistance: Malia McIlvenna malia.mcilvenna@schools.utah.gov USBE Data & Accountability 801-538-7731	Upload then inspect file. Instructions and submissions are at the datagateway.schools.utah.gov/UTREx
January			
February			
27 th	DLM Instructional Embedded Assessment window closes	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education 801-538-7887	
March			
11 th	DLM/UAA Spring Assessment Window Opens	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education 801-538-7887	Students who are eligible for the alternate assessment must have 1% marked within their special education record (SCRAM), and be enrolled in an appropriate course. Spreadsheet sent to LEAs based on March UTREx data. DLM & UAA Window closes June 7. Students may test anytime during the window.
15 th	Special Education Annual Performance Report	Lindsey Adams lindsey.adams@schools.utah.gov USBE Special Education 801-538-7806	The LEA will receive the draft tiered monitoring and APR determination.
April			
30 th	UPIPS Improvement Plan	Lindsey Adams lindsey.adams@schools.utah.gov Special Education 801-538-7806	The LEA can submit an improvement plan into the UPIPS system, based on both compliance and outcomes data, and receive feedback from USBE, if necessary, to strengthen their PIP. Complete plan is due June 30th.
May			
June			

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Special Education Related Reports			
7 th	DLM/UAA Spring Assessment Window Closes	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education 801-538-7887	Students who are eligible for the alternate assessment must have 1% marked within their special education record (SCRAM), and be enrolled in an appropriate course.
30 th	UPIPS Corrective Action Plan (CAP) and Program Improvement Plan (PIP) progress report	Lindsey Adams lindsey.adams@schools.utah.gov USBE Special Education 801-538-7806	Submit electronically either via the UPIPS website https://upips.schools.utah.gov
30 th	Special Education Personnel Report	Cole Shakespear Cole.Shakespear@schools.utah.gov USBE Special Education 801-538-7576	Each LEA must submit a report within UPIPS of the number and qualification of special education and related services staff.
30 th	Intensive Services Fund	Cole Shakespear Cole.Shakespear@schools.utah.gov USBE Special Education 801-538-7576	Required from LEAs requesting support for students whose special education services cost more than 3x the state average (about \$20,000). Submitted as an excel file via email.
30 th	Extended Year for Special Educator (EYSE) Stipends report due	Cole Shakespear Cole.Shakespear@schools.utah.gov USBE Special Education 801-538-7576	For days worked in addition to the contract year during the 2 week window following the last day of school. Collected via UPIPS website at https://upips.schools.utah.gov

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Assessments & Related Reports			
Window	Assessment	Contact	Notes
July			
August			
(exact date varies by LEA)	KEEP Entry Assessment Testing Window	Liz Williams liz.williams@schools.utah.gov USBE Kindergarten Specialist 801-538-7721	The KEEP Entry testing window is the 3 weeks prior to the first day of kindergarten through the 3 weeks after the first day of kindergarten.
First day of school (exact date varies by LEA)	DIBELS BOY (Beginning of Year) Testing Window	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	The DIBELS BOY testing window is open through Sept 30.
September			
15 th	LEA Testing Plan	Jared Wright jared.wright@schools.utah.gov USBE Assessment 801-538-7871	The LEA Testing Plan will be shared with USBE via a form in SurveyMonkey. The link to that form will be sent out the beginning of August. The information that will need to be shared is found in Board Rule, R277-404-5 .
30 th	Last day for BOY DIBELS Testing	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	The DIBELS BOY testing window is open through Sept 30.
30 th	KEEP Entry Data is Due	Liz Williams liz.williams@schools.utah.gov USBE Kindergarten Specialist 801-538-7721	The KEEP Entry data is due in the Data Gateway by September 30 th .
October			
1 st	Mid-Year Standards Assessment Benchmarks OPENS	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment 801-538-7876	OPTIONAL. Closes March 8 th . Grade 6-8 science will NOT be available.
31 st	BOY DIBELS data entered	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	Testing occurs from first day of school - September 30
November			
1 st	Mid-year Standards Assessment INTERIM testing window opens	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment 801-538-7876	OPTIONAL. Closes March 8 th . Grades 6-8 Science will NOT be available.
1 st	Mid-year Standards Assessment SUMMATIVE testing window opens	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment 801-538-7876	Window Closes March 8 th . LEAs are responsible for determining school testing windows for each assessed course (R277-404). Assessments must be

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Assessments & Related Reports			
			administered at the end of instruction and while a student is enrolled in the course. Grades 6-8 Science will NOT be available.
December			
1 st	DIBELS MOY (Middle of Year) Testing Window	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	The DIBELS MOY testing window is open from December 1-January 31.
January			
7 th	ACCESS 2.0 Testing Window opens (WiDA)	Ann-Michelle Neal ann-michelle.neal@schools.utah.gov USBE Assessment 801-538-7651	For ELP. Testing window will close March 8.
31 st	Last day for MOY DIBELS Testing	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	The DIBELS MOY testing window is open from December 1-January 31.
February			
20 th	ACT PAPER <u>standard</u> and <u>accommodated</u>	Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694	For all 11th graders. Other dates: Mar 12 and Apr 2 Accommodated window: Feb. 20-22 & 25-28
20 th	ACT ONLINE <u>standard</u> and <u>accommodated</u>	Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694	Feb. 20-22 & 26-28.
25 th	ACT PAPER <u>accommodated</u>	Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694	Feb 25-28
26 th	ACT ONLINE <u>standard</u> and <u>accommodated</u>	Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694	Feb. 20-22 & 26-28.
Last Day in February	MOY DIBELS Data Entry is Due	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	MOY DIBELS data is due by the last day in February in your SIS and DIBELS Vendor system.
March			
1 st	ACT PAPER <u>accommodated</u>	Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694	Mar 1, 4-6
8 th	Mid-year standards assessment testing	Kim Rathke Kim.rathke@schools.utah.gov	LEAs are responsible for determining school testing windows for each assessed

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Assessments & Related Reports			
	<p>window closes for Summative and Interim assessments. Benchmark assessments are available.</p>	<p>USBE Assessment 801-538-7876</p>	<p>course (R277-404). Standards assessments must be administered at the end of instruction and while a student is enrolled in the course.</p>
8 th	<p>ACCESS 2.0 testing window closes</p>	<p>Ann-Michelle Neal ann-michelle.neal@schools.utah.gov USBE Assessment 801-538-7651</p>	<p>For ELP.</p>
12 th	<p>ACT PAPER standard and accommodated</p>	<p>Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694</p>	<p>For all 11th graders. Other dates: Feb 20 and Apr 2 Accommodated window: Mar. 12-15, 18</p>
19 th	<p>Spring Standards Assessment testing window opens [Benchmark* (optional) & Summative – Interim not available]</p>	<p>Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7871</p>	<p>LEAs are responsible for determining school testing windows for each assessed course (R277-404). Assessments must be administered at the end of instruction and while a student is enrolled in the course. Window closes June 17. *Science 6-8 will not be available for benchmarks</p>
25 th	<p>Utah Aspire Plus Assessment testing window opens</p>	<p>Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694</p>	<p>For 9-10 graders, English, Reading, Mathematics, and Science. Closes May 17</p>
April			
2 nd	<p>ACT PAPER standard and accommodated</p>	<p>Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694</p>	<p>For all 11th graders. Other dates: Feb 20 and Mar 12 Accommodated window: Apr. 2-5, 8</p>
Middle of April	<p>DIBELS EOY (End of Year) Testing Window</p>	<p>Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542</p>	<p>The DIBELS EOY testing window is open from mid-April-June 15th.</p>
April (exact date varies by LEA)	<p>KEEP Exit Assessment Testing Window</p>	<p>Liz Williams liz.williams@schools.utah.gov USBE Kindergarten Specialist 801-538-7721</p>	<p>The KEEP Exit testing window is the last 4 weeks of kindergarten.</p>
May			
17 th	<p>Utah Aspire Plus Assessment testing window closes</p>	<p>Rebecca Peterson rebecca.peterson@schools.utah.gov USBE Assessment 801-538-7694</p>	<p>For 9-10 graders, English, Reading, Mathematics, and Science. Opens March 25</p>
May (exact)	<p>KEEP Exit Assessment Testing Window</p>	<p>Liz Williams liz.williams@schools.utah.gov USBE Kindergarten Specialist</p>	<p>The KEEP Exit testing window is the last 4 weeks of kindergarten.</p>

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Assessments & Related Reports			
date varies by LEA)		801-538-7721	
June			
15 th	Last day for EOY DIBELS Testing	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	The DIBELS EOY testing window is open from mid-April-June 15 th .
15 th	KEEP Exit Data is Due	Liz Williams liz.williams@schools.utah.gov USBE Kindergarten Specialist 801-538-7721	The KEEP Exit data is due in the Data Gateway by June 15 th .
15 th	Spring Standards Assessment testing window closes	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7876	LEAs are responsible for determining school testing windows for each assessed course (R277-404). Assessments must be administered at the end of instruction and while a student is enrolled in the course.
30 th	EOY DIBELS Data Entry is Due	Heather Gross Heather.gross@schools.utah.gov USBE Assessment 801-538-7542	EOY DIBELS data is due by June 30 th in your SIS and DIBELS Vendor system.

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Health Related Reports			
Due Date	Report	Contact	Notes
July			
August			
September			
	Vision Screening	Scot Wells swells@utah.gov The Division of Services for the Blind and Visually Impaired (DSBVI) 801-323-4343	Vision Screening should start at the end of September, though the earlier in the school year the better. Vision reports need to be completed by June 15th or before school ends for that school year.
October			
	Vision Screening	Scot Wells swells@utah.gov The Division of Services for the Blind and Visually Impaired (DSBVI) 801-323-4343	Vision Screening should start at the end of September, though the earlier in the school year the better. Vision reports need to be completed by June 15th or before school ends for that school year.
November			
30 th	Immunization Status Report	Nasrin Zandkarimi nzandkar@utah.gov Utah Department of Health (801) 538-9450	Report submitted online. Note: Schools may need to submit a report in June for “Conditional Admission” students or if they were “Out of Compliance”.
December - May			
June			
15 th	Immunization Status Final Report	Nasrin Zandkarimi Utah Department of Health (801) 538-9450	Report ONLY if your Nov 30 report included students who were “Conditional Admission” or “Out of Compliance”.
15 th	Vision Reports	Scot Wells swells@utah.gov The Division of Services for the Blind and Visually Impaired (DSBVI) (801) 323-4343	Due on the 15th or before the school ends for the school year. Add reports through at olderblind.com

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CTE, Miscellaneous, School Land Trust, & SCSB Reports				
Due Date	For	Report	Contact	Notes
July				
August				
15 th		Drivers Education Bi-annual report	Caren Johnson caren.johnson@schools.utah.gov USBE 801-538-7773	Form is emailed to all LEAs with programs.
September				
October				
1 st	LAND	School LAND Trust Funding Report	Karen Rupp karen.rupp@schools.utah.gov USBE School Children's Trust 801-538-7764	Enter School LAND Trust expenditures on website - www.schoollandtrust.org
20 th	LAND	School LAND Trust Committee Membership Form, Principal Assurance Form, and Final Report	Karen Rupp karen.rupp@schools.utah.gov USBE School Children's Trust 801-538-7764	School LAND Trust webpage
31 st		Charter School Certificate of Compliance with Fee Waivers	Cybil Child Cybil.child@schools.utah.gov USBE 801-538-7830	Compliance form and various fee related resources can be found: USBE Policy Resources Webpage
November				
December				
January				
15 th		Drivers Education Bi-annual report	Caren Johnson caren.johnson@schools.utah.gov USBE 801-538-7773	Form is emailed to all LEAs with programs.

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CTE, Miscellaneous, School Land Trust, & SCSB Reports				
February				
March				
April				
1 st	LAND	Progress Report	Karen Rupp karen.rupp@schools.utah.gov USBE School Children's Trust 801-538-7764	Plan submitted online at the School LAND Trust webpage
1 st	LAND	School LAND Trust Plan	Karen Rupp karen.rupp@schools.utah.gov USBE School Children's Trust 801-538-7764	Plan submitted online at the School LAND Trust webpage
30 th	SCSB	Monthly report to school districts (required of new and expanding schools)	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7990	Reports submitted to affected school districts. Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment.
May				
30 th	SCSB	Monthly report to school districts (required of new and expanding schools)	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7990	Reports submitted to affected school districts. Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment.
June				
1 st	CTE	Funding Application for the College and Career Awareness course and End of Year Summary	Ashley Higgs Ashley.higgs@schools.utah.gov USBE Career Technology Education 801-538-7594	The Funding Application for the upcoming FY (completed by CTE Directors) and the End of Year Summary for the current SY (completed by teams and send to CTE Director for signature) forms are on the College & Career Awareness website under "Accountability Forms": https://www.schools.utah.gov/cte/awareness/forms The Funding Application can be found also on the CTE Funding page under "State". The Legislative Estimates for the proposed budgets are shown there under "Allocation Tables"; "State Allocation Tables", "FY#, College and Career Awareness Allocation Table": http://www.schools.utah.gov/CTE/funding/State.aspx Funding Applications are sent through Adobe Acrobat or Adobe Acrobat DC using the Submit Form button located in the upper-right hand corner.

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CTE, Miscellaneous, School Land Trust, & SCSB Reports				
1 st	CTE	New School Applications due for College and Career Awareness	Ashley Higgs Ashley.higgs@schools.utah.gov USBE Career Technology Education 801-538-7594	For more information and application see: https://www.schools.utah.gov/cte/awareness/newschool
30 th	SCSB	Monthly report to school districts (required of new and expanding schools)	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7990	Reports submitted to affected school districts. Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment.