

# Annual Reporting Calendar for SY 2017-18

Updated 6/26/2017

Date	Report	Contact	Notes
<b>JUL</b>			
<b>July</b>	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. SB 329 makes budgets due within 30 days after adoption. Upload to State Auditors website <b>no later than 30 days after adoption.</b>  Note: the State Auditor will withhold all State funding sources if the Charter schools become delinquent in their reporting.
<b>1st</b>	<b>Assessment</b>	Summer SAGE testing window opens	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7876
	<b>SCSB</b>	Application for Expansion of Enrollment	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7990
	<b>Finance</b>	Assurances in the UCA	USBE School Finance (801) 538-7756
<b>16th</b>	<b>Data &amp; Stats</b>	Year End UTREx/Data Clearinghouse upload	For Technical Assistance: 801-538-7800 option 2 or utrexhelp@schools.utah.gov  Other Assistance: Sarah Wald sarah.wald@schools.utah.gov USBE Data & Accountability (801) 538-7947
	<b>SAS</b>	Check the Out of School Youth (OOSY) Report for students earning a GED or an Adult Education Carnegie unit diploma (if applicable)	Marty Kelly marty.kelly@schools.utah.gov USBE - Adult Education (801) 538-7824
<b>20th</b>	<b>SCSB</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7990
<b>29th</b>	<b>Assessment</b>	Summer SAGE testing window closes	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7876
<b>SAS</b>		Title I Reimbursement	Sandra Grant sandra.grant@schools.utah.gov USBE Federal Programs 801-538-7844

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<p><b>30th</b></p> <p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>Finance</b></p>	<p>Utah Public Finance (Transparency) Website Submission</p>	<p>Darrell Swenson State Division of Finance (801) 538-3059</p>	<p>For schools with annual revenues or expenses greater than \$500,000. Quarter Revenue &amp; Expenses must be uploaded within 30 days, except at year end.</p> <p>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.</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>Finance</b></p>	<p>Deposits and Investments Report to the State Money Management Council</p>	<p>Ann Pedroza Money Management Council (801) 538-1883</p>	<p>Data as of June 30. 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 <a href="mailto:mmcouncil@utah.gov">mmcouncil@utah.gov</a>.</p>
<p><b>31st</b></p> <p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>T &amp; L</b></p>	<p>File DWS wage report for prior quarter</p>	<p>Robyn Roberts <a href="mailto:robyn.roberts@schools.utah.gov">robyn.roberts@schools.utah.gov</a> USBE Teaching &amp; Learning (801) 538-7602 or 7834</p>	<p>Forms and information can be found at <a href="https://jobs.utah.gov/ui/employer/employerhome.aspx#">https://jobs.utah.gov/ui/employer/employerhome.aspx#</a></p> <p>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 <a href="http://www.schools.utah.gov/cert/DOCS/APT/altapplication.aspx">http://www.schools.utah.gov/cert/DOCS/APT/altapplication.aspx</a></p>

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<b>AUG</b>			
<b>1st</b>	SAS New!!! Drop Out Report grades 9-12	Lillian Tsosie- Jensen lillian.sosie-jensen@schools.utah.gov Student Advocacy Services 801-538-7962	Will be sent via Survey Monkey. Report for the previous year. See UCA 53A-15-P19 and See R277-606-4
	SPED DLM Educator Portal opens for Teacher account clean-up	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education (801) 538-7887	District Coordinators should update teacher accounts for accuracy before they get uploaded to the Moodle training site on August 22, 2016.
<b>6th</b>	CNP Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	July claim due in pending approval in CNPweb
<b>12th</b>	Vision Screening Training	Scott Wells swells@utah.gov Division of Services for the Blind and Visually Impaired (DSVBI) (801) 323-4343	
<b>15th</b>	Misc. Drivers Education Bi-annual report	Caren Johnson caren.johnson@schools.utah.gov USBE (801) 538-7773	Prior to SY16, was collected via YEWS. New form is emailed to all LEAs with programs.
<b>20th</b>	SCSB Charter School Monthly Financial & Enrollment Report for preceding month	Rabbecca Cisneros rabbecca.cisneros@schools.utah.gov SCSB Office 801-538-7990	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
<b>22nd</b>	SPED 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.

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<b>SEPT</b>			
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	August claim due in pending approval in CNPweb
<b>8th</b>	Fall Interim SAGE testing window opens (optional)	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7876	Interim assessments are OPTIONAL and are administered based on LEA decision. Students may have one opportunity for each assessment during each Interim testing window. Window closes December 16.
	Mid-year SAGE testing window opens		LEAs are responsible for determining school testing windows for each SAGE-assessed course (R277-404). SAGE assessments must be administered at the end of instruction and while a student is enrolled in the course. Mid-year window closes March 3.
<b>15th</b>	Student Membership Audit for prior year	Kirin McInnis kirin.mcinnis@schools.utah.gov USBE Finance (801) 538-7674	Conducted by independent auditor, submitted to USBE. Auditor follows the Guide for Agreed-Upon Procedures Engagements for Local Education Agencies.
	IB Applications for funding associated with the IB program	TBD USBE Teaching & Learning (801) 538-7742	
	Assurance and Expenditure forms due (for schools offering Concurrent Enrollment)	TBD USBE Teaching & Learning (801) 538-7742	Assurance form available at <a href="http://www.schools.utah.gov/curr/Early_College/public_schools.htm">http://www.schools.utah.gov/curr/Early_College/public_schools.htm</a> .
<b>17th</b>	Classified Staff FTE Survey	M'Lissa Holt mlissa.holt@schools.utah.gov USBE Data and Statistics 801-538-7618	Report for the 2016-17 school year. Satisfies federal (EDFacts File 59) and state (Utah Code 53A-1-301(3)(d)(vii)(D) requirements and is published in the Annual Report of the State Superintendent of Public Instruction. Administered via the Data Gateway.
<b>18th</b>	Check the Out of School Youth (OOSY) Report for students earning a GED or an Adult Education Carnegie unit diploma (if applicable)	Marty Kelly marty.kelly@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.
<b>19th</b>	DLM Instructional Embedded Assessment window open (optional for teachers)	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education (801) 538-7887	Students who are eligible for the alternate assessment must have the 1% flag marked within their SIS System, have a special education record (SCRAM), and be enrolled in an appropriate course. Testing Window is September 19th - February 28th. Students can be assessed anytime during the window.
<b>20th</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7990	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>

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30th	Finance	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 schools become delinquent in their reporting. Recently, the Auditor has decided this includes being delinquent in reporting to Transparency.
	Assessment	Last day for Beginning of Year DIEBLS testing	Heather Gross heather.gross@schools.utah.gov USBE Assessment (801) 538-7542	For grades 1-3. Enter data by Oct. 31st.
	SPED	Last day to obligate IDEA funds from prior FY	Patsy Milligan patsy.milligan@schools.utah.gov USBE Special Education (801) 538-7724	This is the last day the LEA may spend IDEA funds that were available beginning July 1.
		Extended Year for Special Educator (EYSE) Stipends Report		For days worked during the 2 weeks before the 2015-2016 school year begins. Submitted within UPIPS.
		CEIS Report		Required for any LEAs that used funds for CEIS during 2014-2015, 2013-2014, or 2012-2013. Submitted within UPIPS.
		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.
End of September - End of October	Vision & Immune	Vision Screening	The Division of Services for the Blind and Visually Impaired (DSBVI) Scot Wells swells@utah.gov (801) 323-4343	Vision Screening should start at the end of September to the end of October, 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.

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<b>OCT</b>			
<b>Oct</b>	Vision Screening	The Division of Services for the Blind and Visually Impaired (DSBVI) Scot Wells (801) 323-4343 swells@utah.gov	Vision Screening should start at the end of September to the end of October, 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.
	Letter of Information to send to parents by schools participating in the STEM Action Center	External Evaluator for the STEM Action Center	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.
<b>1st</b>	Graduation & Dropout Status	Sarah Wald sarah.wald@schools.utah.gov USBE Data & Statistics (801) 538-7947	Verify prior year exit codes for students in grades 9-12 to confirm graduation, dropout, or continuing enrollment.
	UPEFS, which includes Annual Financial Report (AFR) and Annual Program Report (APR) for prior year	Von Hortin von.hortin@schools.utah.gov USBE Finance (801) 538-7670  Emily Britton State Auditor's Office (801) 310-0803	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.
	Verification sample size (if applicable)	USBE Child Nutrition Program (801) 538-7920	Number of approved applications as of October 1st (Verification Summary). Submitted through CNP web <a href="http://cnpweb.schools.utah.gov/cnpweb/Login.asp">http://cnpweb.schools.utah.gov/cnpweb/Login.asp</a>
	School LAND Trust Funding Report	Timothy Donaldson timothy.donaldson@schools.utah.gov USBE School Children's Trust 801-538-7709	Enter School LAND Trust expenditures on website <a href="http://www.schoollandtrust.org">www.schoollandtrust.org</a>
	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.
<b>3rd-10th</b>	Download the Out of School Youth (OOSY) report and update SIS prior to October UTREx submission (if applicable)	Marty Kelly marty.kelly@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. This is the final OOSY Report with cumulative data from 7/1 to 9/30.
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	September claim due in pending approval in CNPweb
<b>7th</b>	Policy and Procedure Manuals for Special Education with new rules	Lindsey Adams lindsey.adams@schools.utah.gov Special Education (801)538-7806	

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10th	Data	UTREx/Data Clearinghouse File Upload for Fall Enrollment	For Technical Assistance: 801-538-7800 option 2 or utrexhelp@schools.utah.gov  Other Assistance: Sarah Wald sarah.wald@schools.utah.gov USBE Data & Accountability (801) 538-7947	Upload then inspect file. Instructions and submissions are at the datagateway.schools.utah.gov/UTREx
	SCSB	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
20th	LAND Trust	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	Plan submitted online: Log on as your school under the charter district at <a href="http://www.schoollandtrust.org">www.schoollandtrust.org</a>
	Finance	Title I Reimbursement	Sandra Grant sandra.grant@schools.utah.gov USBE Title I Programs (801) 538-7704	Reimbursement request due for time period up-to and including September 30 <sup>th</sup>
30th	Finance	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. 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.
	Finance	File DWS wage report for prior quarter		Forms and information can be found at <a href="https://jobs.utah.gov/ui/employer/employerhome.aspx#">https://jobs.utah.gov/ui/employer/employerhome.aspx#</a>
31st	T&L	Annual Criticality Survey	Travis Rawlings or Erica Horsley USBE Teaching & Learning (801) 538-7741	<a href="https://www.surveymonkey.com/r/UTcriticality2016">You may click the following link to start the survey: https://www.surveymonkey.com/r/UTcriticality2016</a>
	Assessment	BOY DIEBLES data entered	Heather Gross heather.gross@schools.utah.gov USBE Assessment (801) 538-7542	Testing occurs from first day of school - September 30
	SPED	Last Day to Request Reimbursement on FY15 IDEA	Patsy Milligan patsy.milligan@schools.utah.gov USBE Special Education (801) 538-7724	This is the last day the LEA may request reimbursement in the UCA for IDEA funds that were available beginning July 1, 2015.
	CNP	October Survey Data & October Paid Lunch Meals by Charge for PLE	Child Nutrition Programs USBE School Specialist (801) 538-7680	October 31st data for the October Survey in CNPweb under the 'Claims' tab. Save October claim information and gather data for the annual Paid Lunch Equity Report (PLE). Need the number of paid meals served by the paid lunch categories. Ensure the current paid lunch price is reported in CNPweb on the Sponsor Info Sheet.

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<b>NOV</b>			
<b>Nov</b>	Teacher surveys completed by schools participating in the STEM Action Center	Sue Redington STEM Action Center sredington@utah.gov	
<b>1st</b>	Application for IDEA Funds	Patsy Milligan patsy.milligan@schools.utah.gov USBE Special Education (801) 538-7724	The IDEA sections of the UCA must be complete. This includes MOE assurance, Excess Costs, USIMAC, and CEIS plans.
	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.
<b>2nd</b>	Class Size Reduction Budget and FTEs Plan and Report (for HB318)	TBD USBE Finance (801) 538-7609	The purposes of HB318 of the 2013 General Session are to collect how the Class Size Reduction (CSR), K-3 Reading, and Title I (K-8) funds are utilized for salaries and benefits by grade/subject, and to estimate the affect the funds have on Average Class Size by grade/subject, by LEA. If you are a charter school and your school receives no CSR funds (a school that serves only grades 9-12) no plan or report for these programs needs to be submitted.
	Utah Consolidated Application (UCA)	TBD USBE Finance (801) 538-7756	Online application available at <a href="https://www.uca.schools.utah.gov">https://www.uca.schools.utah.gov</a> . Call Sarah for username / password and technical assistance. Online Application and LEA Planning Tool must be complete.
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	October claim due in pending approval in CNPweb
<b>CNP</b>	October Survey & Directly Certified Student Report	USBE Child Nutrition Program (801) 538-7920	Free and Reduced Price Lunch Enrollment and number of directly certified students based on October 31st data. Survey submitted through CNP web <a href="http://cnpweb.schools.utah.gov/cnpweb/Login.asp">http://cnpweb.schools.utah.gov/cnpweb/Login.asp</a> . Claims tab-select October Survey.
	Racial/Ethnic Survey National School Lunch Program		Submitted through CNP web <a href="http://cnpweb.schools.utah.gov/cnpweb/Login.asp">http://cnpweb.schools.utah.gov/cnpweb/Login.asp</a> . Claims tab-select October Survey.
	Verification Results Report		Submitted through CNP web <a href="http://cnpweb.schools.utah.gov/cnpweb/Login.asp">http://cnpweb.schools.utah.gov/cnpweb/Login.asp</a> . Claims tab-select Verification Results. Verification activities end on November 15th.
	LEA Second Review of Application Report (if applicable)		Notified by USBE CNP if LEA is required to complete this report. Submitted through CNP web <a href="http://cnpweb.schools.utah.gov/cnpweb/Login.asp">http://cnpweb.schools.utah.gov/cnpweb/Login.asp</a> . Claims tab-select October Survey.



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<b>15th</b>	<b>Finance</b>	Educator salary adjustments per information in CACTUS	Cory Kanth USBE Finance (801) 538-7660  Travis Rawlings travis.rawlings@schools.utah.gov USBE Teaching & Learning (801) 538-7601	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.
	<b>SAS</b>	Title I Waiver Request	Sandra Grant sandra.grant@schools.utah.gov USBE Federal Programs 801-538-7844	Waiver request for carryover greater than 15% due
	<b>T &amp; L</b>	Professional Staff Cost Report for New Charter Schools per information in CACTUS Report for Classroom Supplies and Materials per information in CACTUS Qualified Teachers	Travis Rawlings travis.rawlings@schools.utah.gov USBE Teaching & Learning (801) 538-7601	
		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.  Fee schedule can be found at <a href="http://www.schools.utah.gov/cert/other/fees.htm">http://www.schools.utah.gov/cert/other/fees.htm</a>
<b>20th</b>	<b>SCSB</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
<b>Noon, 24th</b>	<b>T &amp; L</b>	New course submissions to Cyd Grua (for schools offering Concurrent Enrollment)	Cyd Grua Utah System of Higher Education 801-321-7152  USBE Teaching & Learning 801-538-7742	
<b>29th</b>	<b>Finance</b>	Management Letters and Management Response Letters (FY15)	TBD USBE Finance (801) 538-7802	
		Single Audit Report (if applicable) FY15		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.
	<b>Finance</b>	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).

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Vision & Immune	Immunization Status Report	Nasrin Zandkarimi nzandkar@utah.gov Utah Department of Health (801) 538-9450	Report submitted online. To submit report and more information: <a href="http://www.immunize-utah.org/school%20and%20childcare%20requirements/school_and_childcare_reporting_system.html">http://www.immunize-utah.org/school%20and%20childcare%20requirements/school_and_childcare_reporting_system.html</a> or <a href="http://www.immunize-utah.org/pdf/Immunization_Guidebook.pdf">http://www.immunize-utah.org/pdf/Immunization_Guidebook.pdf</a>  Note: Schools may need to submit a report in June for "Conditional Admission" students or if they were "Out of Compliance".
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<b>DEC</b>			
	MOY DIEBLS Testing Window Opens	Heather Gross heather.gross@schools.utah.gov USBE Assessment (801) 538-7542	MOY Testing Window December 1 - January 31; Data entered by the end of February
<b>1st</b>	Application for Expansion of Enrollment for SY19 for schools requiring a facilities project number	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB 801-538-7990	For the Jan SCSB meeting and Feb USBE meeting
	Annual Title I Desktop monitoring instrument (DMI) (for all LEAs who accept Title I, Title III, or SIG funds)	Sandra Grant sandra.grant@schools.utah.gov USBE Title I Programs (801) 538-7704  Becky Peters becky.peters@schools.utah.gov USBE Title I Programs (801) 538-7712	
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	November claim due in pending approval in CNPweb
<b>10th</b>	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: Sarah Wald sarah.wald@schools.utah.gov USBE Data & Accountability (801) 538-7947	Upload then inspect file. Instructions and submissions are at the <a href="http://datagateway.schools.utah.gov/UTREx">datagateway.schools.utah.gov/UTREx</a>
<b>16th</b>	Fall Interim SAGE testing window closes (optional)	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7876	Interim assessments are OPTIONAL and are administered based on LEA decision. Students may have one opportunity for each assessment during each Interim testing window.
<b>20th</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
<b>31th</b>	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.

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<b>JAN</b>			
<b>3rd</b>	Winter Interim SAGE testing window opens (optional)	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7876	Interim assessments are OPTIONAL and are administered based on LEA decision. Students may have one opportunity for each assessment during each Interim testing window. Window closes March 4.
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	December claim due in pending approval in CNPweb
<b>9th</b>	ACCESS 2.0 testing window opens	Ann-Michelle Neal ann-michelle.neal@schools.utah.gov USBE Assessment 801-538-7651	For ELP. Testing window will close March 10.
<b>15th</b>	Complete the certification process in UPEFS for indirect cost rates	Von Hortin von.hortin@schools.utah.gov USBE Finance 801-538-7670	If you go past this date, the indirect cost rate will be 0%
	Drivers Education Bi-annual report	Caren Johnson caren.johnson@schools.utah.gov USBE (801) 538-7773	Prior to SY16, was collected via YEWS.
<b>20th</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
<b>21st</b>	Title 1 Staff FTE Survey	Tandalaya Stitt tandalaya.stitt@school.utah.gov USBE Student Advocacy Services 801-538-7509	Report on the 2016-17 school year. Required by the federal Consolidated State Performance Report (Part II). Administered via the Data Gateway.
<b>25th</b>	NAEP testing window opens (for select schools only)	Angela Battaglia angela.battaglia@schools.utah.gov USBE Assessment (801) 538-7814	
<b>30th</b>	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.
<b>31st</b>	Last day for Middle of Year DIEBLS testing window	Heather Gross heather.gross@schools.utah.gov USBE Assessment (801) 538-7542	For grades 1-3. Data entered at the end of February.
	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 <a href="mailto:mmcouncil@utah.gov">mmcouncil@utah.gov</a> .

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File DWS wage report for prior quarter		Forms and information can be found at <a href="https://jobs.utah.gov/ui/employer/employerhome.aspx#">https://jobs.utah.gov/ui/employer/employerhome.aspx#</a>
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Date	Report	Contact	Notes
<b>FEB</b>			
<b>1st</b>	Site Monitoring (National School Lunch)	Child Nutrition Programs USBE School Specialist (801) 538-7680	Complete self site monitoring sites if there are multiple sites. Completed forms are kept at the School Food Authority level and made available upon Administrative Review.
	Application for National School Lunch Program pre-approval process due	Janalee Smith janalee.smith@schools.utah.gov Child Nutrition Programs USBE School Specialist 801-538-7685	Completed application due to begin preapproval process to become a National School Lunch Sponsor for upcoming school year.
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	January claim due in pending approval in CNPweb
<b>12th</b>	Progress and Observation forms for all ARL teachers	Robyn Roberts robyn.roberts@schools.utah.gov USBE Teaching & Learning (801) 538-7602 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.)
<b>20th</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
<b>28th</b>	DLM Instructional Embedded Assessment window closes	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education (801) 538-7887	
	MOY DIEBLS Data Entered	Heather Gross heather.gross@schools.utah.gov USBE Assessment (801) 538-7542	Grades 1-3. For testing window December 1 - January 31.
	ACT test administered	Jared Wright jared.wright@schools.utah.gov USBE Assessment (801) 538-7871	For all 11th graders. Online - Feb. 28 - Mar 14. Make up testing is on March 15th and April 19th. Accommodations testing is February 28- March 14.

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<b>Date</b>	<b>Report</b>	<b>Contact</b>	<b>Notes</b>
<b>MAR</b>			
<b>1st</b>	Applications for Alternative Routes to Licensure (ARL) program accepted from now until July 31st	Robyn Roberts robyn.roberts@schools.utah.gov USBE Teaching & Learning (801) 538-7602 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 <a href="http://www.schools.utah.gov/cert/DOCS/APT/altapplication.aspx">http://www.schools.utah.gov/cert/DOCS/APT/altapplication.aspx</a>
<b>3rd</b>	Mid-year SAGE testing window closes	Jared Wright jared.wright@schools.utah.gov USBE Assessment (801) 538-7871	LEAs are responsible for determining school testing windows for each SAGE-assessed course (R277-404). SAGE assessments must be administered at the end of instruction and while a student is enrolled in the course.
	Winter Interim SAGE testing window closes (optional)		Interim assessments are OPTIONAL and are administered based on LEA decision. Students may have one opportunity for each assessment during each Interim testing window.
<b>4th</b>	NAEP testing window closes (for select schools only)	Angela Battaglia angela.battaglia@schools.utah.gov USBE Assessment (801) 538-7814	Only applies to selected schools.
	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	February claim due in pending approval in CNPweb
<b>10th</b>	ACCESS 2.0 testing window closes	Ann-Michelle Neal ann-michelle.neal@schools.utah.gov USBE Assessment 801-538-7651	For ELP.
<b>11th</b>	Annual USDA Foods Request Survey	Amy Woosley amy.woosley@schools.utah.gov USBE Child Nutrition Programs (801) 538-7697	USDA Foods request for next school year through CNPweb.
<b>12th</b>	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. DLM Window closes June 8. Students may test anytime during the window.
<b>15th</b>	ACT make up test	Jared Wright jared.wright@schools.utah.gov USBE Assessment (801) 538-7871	For all 11th graders. Accommodations testing is February 28 - March 14.
	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 from SY2015-2016. Any appeals must be submitted by 4/15/2017.
<b>20th</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
	Spring SAGE testing window opens	Kim Rathke kim.rathke@schools.utah.gov USBE Assessment (801) 538-7871	LEAs are responsible for determining school testing windows for each SAGE-assessed course (R277-404). SAGE assessments must be administered at the end of instruction and while a student is enrolled in the course. Window closes June 16.

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<b>25th</b>	<b>CNP</b>	Fresh Fruit and Vegetable Grant Applications	Leslie Haberkern leslie.haberkern@schools.utah.gov USBE Child Nutrition Programs (801) 538-7562	Applications due for SY 16-17. Grants available to PreK-6th grade elementary school students in schools operating the National School Lunch Program. Priority goes to those elementary schools with the highest percentage of students eligible for free and reduced-price meals (at least 50%). Application and instructions attached.
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Date	Report	Contact	Notes
<b>APR</b>			
<b>April</b>	Student post-survey by schools participating in the STEM Action Center	Sue Redington STEM Action Center Program Director sredington@utah.gov	
<b>1st</b>	2015-16 Progress Report and 2016-17 School LAND Trust Plan	Karen Rupp karen.rupp@schools.utah.gov USBE School Children's Trust 801-538-7764	Plan submitted online at <a href="http://www.schoollandtrust.org">http://www.schoollandtrust.org</a>
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	March claim due in pending approval in CNPweb
<b>15th</b>	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.
	Application for participation in Regular or Seamless Summer Food Program	Brita Harper brita.harper@schools.utah.gov USBE Child Nutrition Program (801) 538-7659	Deadline for application entry and approval for participation in regular Summer or seamless SFSP. Submitted though CNPweb.
	Child Nutrition Program Sponsor and Site Information Sheets due for upcoming school year for Schools and FDP modules	Child Nutrition Programs USBE School Specialist 801-538-7680	Complete in CNPweb
<b>19th</b>	ACT make up test	Jared Wright jared.wright@schools.utah.gov USBE Assessment (801) 538-7871	For all 11th graders. Accommodations testing is February 28 - March 14.
<b>20th</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
<b>30th</b>	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.
	File DWS wage report for prior quarter		Forms and information can be found at <a href="https://jobs.utah.gov/ui/employer/employerhome.aspx#">https://jobs.utah.gov/ui/employer/employerhome.aspx#</a>
	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.

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SCSB	Monthly report to school districts (required of new and expanding schools)	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Reports submitted to effected school districts. Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment.
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Date	Report	SCSB Office	Notes
<b>MAY</b>	801-538-7990		
<b>May</b>	Teacher post-survey by schools participating in the STEM Action Center	Sue Redington STEM Action Center sredington@utah.gov	
	SSID collection for schools participating in the STEM Action Center		SSIDs of students who have used products through the end of April.
<b>1st</b>	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.
<b>4th</b>	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	April claim due in pending approval in CNPweb
<b>9th</b>	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 <a href="https://tssp.schools.utah.gov/handler">https://tssp.schools.utah.gov/handler</a>
<b>15th</b>	Application for participation in School Meal Programs (FDP, NSLP, SBP, SMP, ASSP, FFVP)	Kim Loveland kim.loveland@schools.utah.gov USBE Child Nutrition Program (801) 538-7684	Deadline for application entry and approval for participation in National School Lunch, Breakfast, Milk, Snack and Fresh Fruit and Vegetable Programs. Submitted through CNPweb <a href="http://cnpweb.schools.utah.gov/cnpweb/Login.asp">http://cnpweb.schools.utah.gov/cnpweb/Login.asp</a>
<b>20th</b>	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>
<b>31st</b>	Monthly report to school districts (required of new and expanding schools)		Reports submitted to effected school districts. Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment.

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Date	Report	Contact	Notes
<b>JUNE</b>			
1st	Funding Application for the College and Career Awareness course and End of Year Summary	Ashley Higgs 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 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": Funding Applications are sent electronically to Ashley Higgs for charter schools.
	New School Applications due for College and Career Awareness	Ashley Higgs USBE Career Technology Education (801) 538-7594	For more information and application see: <a href="http://schools.utah.gov/cte/awareness/new.aspx">http://schools.utah.gov/cte/awareness/new.aspx</a>
4th	Child Nutrition Claims	Child Nutrition Programs USBE School Specialist (801) 538-7680	May claim due in pending approval in CNPweb
8th	DLM Spring Assessment Window Closes	Tracy Gooley tracy.gooley@schools.utah.gov USBE Special Education (801) 538-7887	All special codes must be entered into the DLM KITE system by this date. DLM will report scores to the state automatically. UAA Science scores and special codes will get reported through MOVEit.
15th	Immunization Status Final Report	Nasrin Zandkarimi Utah Department of Health (801) 538-9450	Report submitted online: <a href="http://www.immunize-utah.org/school%20and%20childcare%20requirements/school_and_childcare_reporting_system.html">http://www.immunize-utah.org/school%20and%20childcare%20requirements/school_and_childcare_reporting_system.html</a> or <a href="http://www.immunize-utah.org/pdf/Immunization_Guidebook.pdf">http://www.immunize-utah.org/pdf/Immunization_Guidebook.pdf</a>  Report ONLY if your Nov 30 report included students who were "Conditional Admission" or "Out of Compliance".
	Last day for End of Year DIEBLS testing window	Heather Gross heather.gross@schools.utah.gov USBE Assessment (801) 538-7542	For grades 1-3. Testing window mid-April - June 15. Data entered by June 30.
	Vision Reports	The Division of Services for the Blind and Visually Impaired (DSBVI) Scot Wells (801) 323-4343 swells@utah.gov	Due on the 15th or before the school ends for the school year. Add reports through at <a href="http://olderblind.com">olderblind.com</a>
	Annual Comprehensive Program Report		Report collected via survey monkey. Additional information will be sent closer to date.
16th	Spring SAGE 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 SAGE-assessed course (R277-404). SAGE assessments must be administered at the end of instruction and while a student is enrolled in the course.
20th	Charter School Monthly Financial & Enrollment Report for preceding month	Rabecca Cisneros rabecca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Monthly reports required for planning year and schools in their first operational year <a href="http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx">http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx</a>

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30th	T&L	Complete CACTUS update	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 for the next school year.
	Assessment	DIEBELS EOY Update	Heather Gross heather.gross@schools.utah.gov USBE Assessment 801-538-7542	See R277-403-4
	SCSB	Monthly report to school districts (required of new and expanding schools)	Rabeca Cisneros rabeca.cisneros@schools.utah.gov SCSB Office 801-538-7958	Reports submitted to effected school districts. Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment.
		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 <a href="https://upips.schools.utah.gov">https://upips.schools.utah.gov</a>
		Special Education Personnel Report	Patsy Milligan patsy.milligan@schools.utah.gov USBE Special Education (801) 538-7724	Each LEA must submit a report within UPIPS of the number and qualification of special education and related services staff.
		Intensive Services Fund		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.
		Extended Year for Special Educator (EYSE) Stipends report due		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 <a href="https://upips.schools.utah.gov">https://upips.schools.utah.gov</a>
	Special Education Intensive Services report due	This report is only required for LEAs who have students with intensive services required by their IEP. The cost to provide services for each eligible student must be over \$20,016 (or \$15,012 for preschoolers). To submit, email the relevant completed form to Jennifer Howell by June 30, 2015. If you have no eligible students, you do not need to submit anything.		