Date	Report	Contact	Notes
JULY			
7th	Data Clearinghouse upload	Bruce Hudgens USOE Computer Services (801) 538-7926	Upload then inspect file. Clearinghouse submission: http://www.schools.utah.gov/computerservices/Clearinghouse/Clearinghouse.htm
	Year End Web Survey: Data Clearinghouse upload	Bruce Hudgens USOE Computer Services (801) 538-7926 Emily Tew USOE Data & Accountability (801) 538-7947	S3 data collection website: http://www.usoe.k12.ut.us/s3 Questions regarding what goes into report (elements, etc) go to Bruce.
	Compliance & Assurances Statement	Emily Tew USOE Data & Accountability (801) 538-7947	
15th	Adult Education end-of-year program summary (if applicable)	Shauna South USOE CTE - Adult Education (801) 538-7849	Report and information found at http://www.schools.utah.gov/adulted/directors/reports.htm
	File Budget for current year to the Utah State Auditor and USOE	Kent Godfrey State Auditor's Office (801) 538-1384 Sean Thomas USOE Finance (801) 538-7802	Use AFR form: www.schools.utah.gov/sfacs/
	Optional Extended-Day Kindergarten (OEK) annual report for FY11 (if applicable)	Reed Spencer USOE Teaching & Learning (801) 538-7785	Online forms available at http://www.schools.utah.gov/curr/lang_art/elem/oek.htm
	Annual K-3 Reading Proficiency Report due (2010-2011 data)	Reed Spencer USOE Teaching & Learning (801) 538-7785	Online form available at http://www.schools.utah.gov/curr/lang_art/elem/k3Framework.htm
20th	Charter School Monthly / Quarterly Financial & Enrollment Report for preceding month or quarter (April - June 2011)	Cory Kanth USOE Charter Schools (801) 538-7703	Monthly reports required for new schools, quarterly thereafter. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
31st	Utah Money Management Report	Ann Pedroza Money Management Council (801) 538-1883	Data as of June 30, 2011. Request for report sent from Treasurer's office. Report sent to: Utah Money Management Council, PO BOX 142315, S.L.C., UT 84114-2315
	File DWS wage report for prior quarter		Forms and information can be found at https://jobs.utah.gov/ui/qtrreport.asp

Date	Report	Contact	Notes
AUGUST			
1st	Title I Statistical / NCLB Data Report	Sandra Grant USOE Title I (801) 538-7844	Submit reports electronically to kreig.kelley@schools.utah.gov. Online forms available at: http://schools.utah.gov/titlei/Forms-Checklists-Data.aspx
	SERF Released	Robert Nicholson USOE Computer Services 801-538-7931	
15th	Final date to submit USHE Spring and End of Year Verification (for schools offering Concurrent Enrollment)	Cyd Grua Utah System of Higher Education 801-321-7152	
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx

Date	Report	Contact	Notes
SEPTEMBER			
	Vision screenings for all pre-K, K, 1st, 2nd, and 3rd grade students	Cindey Page Services - Blind & Visually Impaired (801) 323-4371	Enrollment report for Kindergarten is due within 10 days from the start of school. Additional reports are due withn 10 days of new student enrollment.
1st	Assurance Document and Expenditure Report (for schools offering Concurrent Enrollment)	Moya Kessig USOE Teaching & Learning (801) 538-7742	Assurance form available at http://www.schools.utah.gov/curr/Early_College/public_schools.htm.
	Adult Education collection of tuition and fees (if applicable)	Shauna South USOE CTE - Adult Education (801) 538-7849	Report and information found at http://www.schools.utah.gov/adulted/directors/reports.htm
15th	Student Membership Audit for prior year (SY 2010-2011)	Emily Eyre USOE Finance (801) 538-7671	Conducted by independent auditor, submitted to USOE. Auditor follows Legal Compliance Guide http://www.sao.utah.gov/lgResources.html
	Adult Education compliance audit (if applicable)	Shauna South USOE CTE - Adult Education (801) 538-7849	Report and information found at http://www.schools.utah.gov/adulted/directors/reports.htm
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
3rd Week	Third Week Registration Report (for schools offering Concurrent Enrollment)	College/University Contact	

Date	Report	Contact	Notes
OCTOBER			
FALL	Vision screenings for all pre-K, K, 1st, 2nd, and 3rd grade students:	Cindey Page Services - Blind & Visually Impaired (801) 323-4371	Vision screenings are to be completed in the fall with required forms faxed immediately following screenings. New enrollees are due with 2 weeks after their enrollment.
1st	Fall Enrollment Audit conducted for current year (SY 2011-2012)	Emily Eyre USOE Finance (801) 538-7671	Audit performed at your school by your independent auditor. Audit must occur on October 1.
	Annual Financial Report (AFR) for prior year (SY 2010-2011)	Kent Godfrey State Auditor's Office (801) 538-1384 Von Hortin USOE Finance (801) 538-7670	Submit report to both USOE and Utah State Auditor
	Annual Program Report (APR) for prior year (SY 2010-2011)	Von Hortin USOE Finance (801) 538-7670	Submit report to USOE
	Verification sample size (if applicable)	Brian Gardner USOE Child Nutrition Program (801) 538-7920	Number of approved applications as of October 1st (summary). Submitted through CNP web http://cnpweb.schools.utah.gov/cnpweb/Login.asp
	Final Deadline to Complete CACTUS update	Diane DeMan USOE Teaching & Learning (801) 538-7741	All information should be correct and complete in CACTUS, including removal of teachers not returning.
10th	Extended School Year (ESY) for Severely Disabled Report (if applicable)	Jennifer Howell USOE Special Education (801) 538-7724	For prior year (SY 2010-2011)
15th	CTE implementation plan & budget (2011-2012)	Sherry Marchant USOE Career Technology Education (801) 538-7594	Plan can be found: http://www.schools.utah.gov/cte/cteintro_plan.html. This is for all schools regardless of whether or not funds were accepted.
	National School Lunch (NSL) Program Participation Worksheet (if applicable)	Leslie Knowlton USOE Child Nutrition Program (801) 538-7603	
	Northwest Accreditation Commission annual report	Georgia Loutensock USOE Teaching & Learning (801) 538-7789	Forms and information available at http://www.schools.utah.gov/curr/accred/reports.htm
	Data Clearinghouse File Upload for Fall Enrollment	Bruce Hudgens USOE Computer Services (801) 538-7926 Emily Tew USOE Data & Accountability (801) 538-7947	YE CLH File (Documentation) http://delleat.schools.utah.gov/s3/YearEndWebSurvey_2010_Help.pdf (Submission) https://secure.schools.utah.gov. After upload school must inspect file.
	Choose UAAs tasks	Wendy Carver USOE Special Education (801) 538-7639	This only applies to students with significant cognitive disabilities who take Utah's Alternate Assessment (UAA).
20th	Charter School Monthly / Quarterly Financial & Enrollment Report for preceding month or quarter (July - September 2011)	TBD	Monthly reports required for new schools, quarterly thereafter. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx

30th	File DWS wage report for prior quarter		Forms and information can be found at https://jobs.utah.gov/ui/qtrreport.asp
	Utah Consolidated Application	Sarah Moore USOE Title I Programs (801) 538-7756	Online application will be posted July 1, 2011 at https://www.schools.utah.gov. Call Sarah for username / password and technical assistance.
31st	School Fee Certification of Compliance	Carol Lear USOE Law & Legislation (801) 538-7830	Forms and information found at http://schools.utah.gov/law/School-Fee-Forms.aspx Fax to (801) 538-7768

Date	Report	Contact	Notes
NOVEMBER			
1st	Fall Enrollment & Transfer Student Documentation Audit Report	Emily Eyre USOE Finance (801) 538-7671	To be conducted by an independent auditor and submitted by your school to the attention of Emily Eyre. The auditor must follow the procedures listed in the State of Utah Legal Compliance Guide (App
	Negotiations Report	Sean Thomas USOE Finance (801) 538-7802	Form emailed by Sean Thomas. This report will be used to determine how many teachers will generate the $2,500.
	Title I Comparability Report (for 2010-2011 data)	Sandra Grant USOE Title I (801) 538-7844	Submit reports electronically to kreig.kelley@schools.utah.gov. Online forms available at: http://schools.utah.gov/titlei/Forms-Checklists-Data.aspx
14th	Letter of Authorizations DUE (Written letter and fees must be received in Teaching & Learning Section and educator entered in CACTUS.)	Stephanie Ferris USOE Teaching & Learning (801) 538-7752	Fee schedule can be found at http://www.schools.utah.gov/cert/other/fees.htm
15th	Free and Reduced Price Lunch Enrollment Survey	Leslie Knowlton USOE Child Nutrition Program (801) 538-7603	Submitted through CNP web http://cnpweb.schools.utah.gov/cnpweb/Login.asp. Report based on October 31 data.
	National School Lunch Program Application verifications completed (if applicable)	Brian Gardner USOE Child Nutrition Program (801) 538-7920	Deadline for completing verification of free and reduced-price applications at http://cnpweb.schools.utah.gov/cnpweb/Login.asp
	CACTUS Update for Current Year	Travis Rawlings USOE Teaching & Learning (801) 538-7601	On this date the USOE will extract data from your CACTUS system. No additional procedures are required by the school. Data used for certain funding formulas.
	Educator salary adjustments per information in CACTUS	Travis Rawlings USOE Teaching & Learning (801) 538-7601	This report provides the basis for school allocations of funding to be used toward.educator salary adjustments
19th	School LAND Trust Committee Report (2011-2012 data) and 2010-2011 Final Report	Karen Rupp USOE School Children's Trust 801-538-7764	Plan submitted online: Log on as your school under the charter district at www.schoollandtrust.org
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
30th	School LAND Trust Committee Report (2011-2012 data) and 2010-2011 Final Report	Karen Rupp USOE School Children's Trust 801-538-7764	Plan submitted online: Log on as your school under the charter district at www.schoollandtrust.org
	Last day to submit new concurrent course proposals / retiring courses as addendum to MOU	College / University Contact & Cyd Grua Utah System of Higher Education 801-321-7152 Moya Kessig USOE Teaching & Learning 801-538-7742	Directions can be found at http://www.schools .utah.gov/curr/Early_College/documents/ProcessforCreatingaConcurrentEnrollmentCourse.pdf Form can be found at http://www.schools. utah.gov/curr/Early_College/Forms/CE%20CurriculumReviewForm%20FY10-11.pdf
	Immunization Status Report	Nasrin Zandkarimi Utah Department of Health (801) 538-6570 Linda Abel Utah Department of Health (801) 538-6905	Report submitted online: http://www.immunize-utah.org/provider/school/schoolchild_requirements.htm School Immunization Guidebook: http://www.immunize-utah.org/provider/school/schoolchild_requirements.htm

30th	Audited Financial Statements, prior year	Kent Godfrey State Auditor's Office (801) 538-1384 Sean Thomas USOE Finance & Statistics (801) 538-7802	Submit to USOE & State Auditor's Office sean.thomas@schools.utah.gov kgodfrey@utah.gov

Date	Report	Contact	Notes
DECEMBER			
1st - 15th	Data Clearinghouse File Upload for Special Education	Jennifer Howell USOE Special Education (801) 538-7724 Bruce Hudgens USOE Computer Services (801) 538-7926	Information on Clearinghouse can be found at: http://www.schools.utah.gov/warehouse/ After upload school must inspect file.
1st	Annual Title I Desktop monitoring instrument	Kreig Kelley USOE Title I (801) 538-7975	Forms available at http://schools.utah.gov/titlei/Forms-Checklists-Data.aspx Please contact Sarah Moore for login/password sarah.moore@schools.utah.gov
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx

Date	Report	Contact	Notes
JANUARY			
1st - 31st	Order materials and complete preprints for DIEBELS Next. Testing occurs 14 weeks prior to last Monday of school year (3 week period). Pay attention to the Assessment Director's memos for the actual ordering window.	Dan Anthony USOE Assessment (801) 538-7862 Sharon Marsh USOE Computer Services (801) 538-7915	2011-2012 testing calendar available at http://schools.utah.gov/assessment/Testing-Director-Resources/TD_Test_Administration_Calendar_11-12.aspx
20th	Charter School Monthly / Quarterly Financial & Enrollment Report for preceding month or quarter (October - December 2011)	TBD	Monthly reports required for new schools, quarterly thereafter. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
31st	Utah Money Management Report	Ann Pedroza Money Management Council (801) 538-1883	Data as of December 31, 2011. Request for report sent from Treasurer's office. Report sent to: Utah Money Management Council, PO BOX 142315, S.L.C., UT 84114-2315
	File DWS wage report for prior quarter		Forms and information can be found at https://jobs.utah.gov/ui/qtrreport.asp

Date	Report	Contact	Notes
FEBRUARY			
	DIEBELS Next testing occurs 14 weeks prior to last Monday of school year (3 week period).		2011-2012 testing calendar available at http://schools.utah.gov/assessment/Testing-Director-Resources/TD_Test_Administration_Calendar_11-
1st	Special Education Policies and Procedures Manual	Leah Voorhies USOE Special Education (801) 538-7898	A sample manual can be found online at http://www.schools.utah.gov/sars/inforesource/charterschools.htm
15th	Progress and Observation forms for all ARL teachers	Robyn Roberts USOE Teaching & Learning (801) 538-7602 or 7834	Principal must complete and mail 2 forms to USOE. (ARL mails the forms to principal & teacher beforehand.)
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
3rd Week	Third Week Registration Report (for schools offering Concurrent Enrollment)	College/University Contact	

Date	Report	Contact	Notes
MARCH			
1st - 15th	Order materials and complete preprints for CRT.	Dan Anthony USOE Assessment (801) 538-7862 Sharon Marsh USOE Computer Services (801) 538-7915	2011-2012 testing calendar available at http://schools.utah.gov/assessment/Testing-Director-Resources/TD_Test_Administration_Calendar_11-12.aspx
1st	Applications for Alternative Routes to Licensure (ARL) program accepted	Robyn Roberts USOE Teaching & Learning (801) 538-7602 or 7834	Applications for new ARL candidates for upcoming school year accepted March 1 - July 31. Application found at http://www.schools.utah.gov/cert/DOCS/APT/altapplication.aspx
	National School Lunch Program re-application (if applicable)	Brian Gardner USOE Child Nutrition Program (801) 538-7920	Deadline for completing the verification report of those who were terminated, reapplied before Feb. 15, were verified, and are now receiving benefits. http://cnpweb.schools.utah.gov/cnpweb/Login.asp
15th	Final date to submit USHE Fall/Summer Verification (for schools offering Concurrent Enrollment)	Cyd Grua Utah System of Higher Education 801-321-7152	
15th	2011-2012 Progress Report and 2012-2013 School LAND Trust Plan	Karen Rupp USOE School Children's Trust 801-538-7764	Plan submitted online at http://www.schoollandtrust.org
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx

Date	Report	Contact	Notes
APRIL			
	CRT testing occurs 6 weeks prior to the last Monday of the school year (6 week period)	Sharon Marsh USOE Computer Services (801) 538-7915	
1st	Deadline for submitting amendment requests for increased enrollment or satellite schools.	Marlies Burns USOE Charter Schools (801) 538-7817	Amendment request forms available at http://www.schools.utah.gov/charterschools/application.htm
15th	Final deadline to submit Letter of Authorizations (for employees hired after November 15)	Stephanie Ferris USOE Teaching & Learning (801) 538-7752	Written letter and fees must be received in Teaching & Learning Section and educator entered in CACTUS.
20th	Charter School Monthly / Quarterly Financial & Enrollment Report for preceding month or quarter (January - March 2012)	TBD	Monthly reports required for new schools, quarterly thereafter. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
30th	File DWS wage report for prior quarter		Forms and information can be found at https://jobs.utah.gov/ui/qtrreport.asp
	Monthly report to school districts (required of new and expanding schools)	Marlies Burns USOE Charter Schools (801) 538-7817	Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment
	Partner Contract / Signed MOU Due (for schools offering Concurrent Enrollment)	College/University Contact & Cyd Grua Utah System of Higher Education 801-321-7152	Send contract to partner college and Utah Systems of Higher Education.

Date	Report	Contact	Notes
MAY			
	Upload New Core Code Table for edit program (needed for Clearinghouse uploads).	Bruce Hudgens USOE Computer Services (801) 538-7926	Secure website: https://secure.schools.utah.gov Go to Distribution/ Clearinghouse Edit Program/ Instructions PDF
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
31st	Monthly report to school districts (required of new and expanding schools)	Marlies Burns USOE Charter Schools (801) 538-7817	Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment

Date	Report	Contact	Notes
JUNE			
1st	Letter of Intent to participate in Optional Extended-Day Kindergarten & K-3 Reading Funding (tentative deadline)	Reed Spencer USOE Teaching & Learning (801) 538-7893	This is for all K-3 schools. Letter template available at: http://www.schools.utah.gov/curr/lang_art/elem/oek.htm and contains both forms in one
	CTE Introduction funding application (2012-2013)	Sherry Marchant USOE Career Technology Education (801) 538-7594	Application available online at http://www.schools.utah.gov/cte/funding_state.html. Questionnaire available from CTE Contact. This optional funding is applied for annually.
15th	Final Budget (2011-2012)	TBD	Submit final budget to governing board for review
	Immunization Status Final Report	Nasrin Zandkarimi Utah Department of Health (801) 538-6570 Linda Abel Utah Department of Health (801) 538-6905	Report submitted online: http://www.immunize-utah.org/provider/school/schoolchild_requirements.htm Report <u>ONLY</u> if your Nov 30 report included students who were “Conditional Admission” or “Out of Compliance”
	CTE Introduction End of Year Summary (for ending school year) and finalized budget (for past school year)	Sherry Marchant USOE Career Technology Education (801) 538-7594	These forms are included at the end of the Implementation Plan from the beginning of the current school year.
	Safe & Drug Free Schools Incident Report	Verne Larsen USOE Career & Technical Education (801) 538-7713	Additional information will be sent by Verne closer to date
	Final follow-up on students that failed vision screenings	Cindey Page Services - Blind & Visually Impaired (801) 323-4371	Updates are due throughout the year with final results from the doctor/parent submitted from the school for each child that failed the vision screenings
	Year-end report of safe schools incidents – School Report	Margaret Lubke, USU/RISEP	Incident data submitted online: http://risep.usurf.usu.edu FAQ: https://risep.usurf.usu.edu/about
20th	Charter School Monthly Financial & Enrollment Report	TBD	Monthly reports required for new schools. http://www.schools.utah.gov/charterschools/School-Resources/Forms-and-Required-Reports.aspx
29th	CACTUS Educator data update	Travis Rawlings USOE Teaching & Learning (801) 538-7601	Year-end update of teacher information intoe CACTUS. Extracted data used to fund the professional staff cost formula, and to publish the average salaries, FTE counts, and staffing ratios.
30th	Monthly report to school districts (required of new and expanding schools)	Marlies Burns USOE Charter Schools (801) 538-7817	Reports must contain the aggregate numbers of new students, sorted by their resident school and grade level, who have accepted enrollment
	Complete CACTUS update	Diane DeMan USOE 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.