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## School Finance Newsletter from the Indiana Department of Education

Indiana Department of Education sent this bulletin at 01/19/2024 08:00 AM EST



Indiana Department of Education

Dr. Katie Jenner, Secretary of Education

## School Finance Newsletter

This monthly newsletter from the Indiana Department of Education (IDOE) combines new information, resources, and support for school finance professionals in a single location.

### Office of School Finance

#### NEW: February Membership Count Date

Please read this [memo](#) regarding the February membership count date. Contact IDOE's [Office of School Finance](#) with any questions.

#### REMINDER: Summer School Estimates

The window to submit the Estimated Cost Report for Summer School 2024 will open on Thursday, February 1. Please read this [memo](#) for information regarding eligible courses, important dates, and financial provisions. Detailed information about the summer school programs and how to report is included in this [presentation](#). Contact [Teresa Hemmerle](#) or [Alex Waite](#) with any questions.

#### REMINDER: Form 9 Financial Reporting for January to June 2024

Beginning in January 2024, the chart of accounts will be modified to streamline the transfer reports completed in step four of Form 9 data submissions. Instead of using accounts 60100 and 5200 to indicate every fund transfer, school corporations and charter schools will need to indicate the funds involved in the transfer by using expenditure and receipt accounts specific to the fund transfers. Please read this [memo](#) regarding the changes to fund transfer account numbers. Contact IDOE's [Office of School Finance](#) with any questions.

#### REMINDER: Form 9 Financial Reporting for July to December 2023

The deadline to submit Form 9 financial data for July 2023 to December 2023 is Wednesday, January 31. The Form 9 application, which includes a link to the financial transparency submission page, can be accessed via the LINK Portal. Once in the portal, the financial administrator will navigate to the "Form 9 Financial Data" tile. Guidance on the submission process can be found in the Public Finance Community in [Moodle](#). Contact [form9@doe.in.gov](mailto:form9@doe.in.gov) with any questions.

### Choice Scholarship Program

#### 2024-2025 Choice School Application

Schools that wish to participate in the Choice Scholarship Program must apply each year, even if the school participated in a previous school year. The window to begin submitting applications for the 2024-2025 school year opens on Friday, January 26, and closes on Sunday, September 1. Information on what to include in the application and how to apply is in [this](#) application packet. The application packet includes the Choice School Application Memo, Getting Started for Schools, the school application (State Form 54705, R11/1-24), Special Education Assurance Form, Guidance on Discounts and Fees, and the Choice School Contact Form. The application packet will be posted on the Choice Scholarship Program website and in the Non-Public School Community in [Moodle](#) prior to Friday, January 26.

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## February Regional Meetings

Choice specialists will travel to six locations: Seymour, Indy South, LaPorte, Indy North, Evansville, and Fort Wayne in February to present Choice information. The content for February meetings includes information regarding the student and school applications, school visits, Choice Shadowing Program, among other items, for the 2024-2025 school year. Title programs information will be presented by the Ombudsman. Registration is open and each person attending should [register here](#) to ensure that meeting materials are available for each attendee. Meeting locations and the link to register for the meetings is also posted on the Choice Scholarship Program website and in the Non-Public School Community in [Moodle](#). Each meeting begins at 9:00 a.m., local time.

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## Membership, Period 2

The Census Date for period 2 membership is Thursday, February 1. All Choice students – both period 1 and period 2 – must be reported in Membership for funding in Data Exchange (DEX) to be eligible for the next Choice payment. Schools should work with their Student Information System (SIS) to ensure all data is complete and accurate at any time between now and the deadline to certify the data, Wednesday, February 14. More information regarding reporting can be found in the Data Exchange Knowledge Hub. In the Knowledge Hub, you will find: Communications Hub (Announcements and Updates), School Support (Reporting Guides, Template Hub, FAQ, Training), Ed-ID Support (How To's, Tutorials and General Information), Vendor Support and so much more! Access the Knowledge Hub through the LINK Portal or [click here](#). Watch this [short video](#) for an overview of the Data Exchange Knowledge Hub and how easy it is to find answers to many of your questions.

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## Endorsement Forms

The window to upload Endorsement Forms for period 2 Choice Scholarship students opened on Tuesday, January 16, and closes on Monday, March 4. Endorsement Forms for period 2 Choice Scholarship students are required to be signed by both the parent/guardian of the applicant and by a school representative and then uploaded to the STN Application Center on or before Monday, March 4. A Choice payment cannot be made for any student that does not have a signed Endorsement Form uploaded to the STN Application by the deadline.

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## Enrollment

All students must have enrollment information, please review the 'Student School Association' report in the 'Operational Data Store Review' (ODS) in DEX to ensure that all students have an entry date. Any students who have left your school prior to the end of the school year must have an exit date reported. Entry and exit dates are required to be reported within five days of enrolling or withdrawing from the school. If a student has missed 20 or more consecutive instructional days an exit date must be reported for the student to terminate the Choice Scholarship. The student's exit date should be the last day the student was in attendance and should be a day reported as a student instructional day on your school calendar.

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## Transfers to In-State Accredited Schools

Students exited with a 19 (Transferred) will have an Unknown status on the cohort report until they are picked up by the receiving school in Enrollment and have at least one positive attendance day on Data Exchange. For cohort audit purposes, there is no documentation required for the exit code 19, since the student does not exit the cohort. Students that transfer from your school to another Indiana accredited school (a school that reports data to the state) will be removed from your cohort report completely and will be placed on the receiving school's cohort the business day after they are entered in Enrollment and Attendance by the receiving school. Check the cohort status of the students that have been exited with a 19. If they have an Unknown status on your cohort report, they have not been picked up by the receiving school. Contact the school the student was supposed to attend to find out additional details about the student's enrollment. Contact IDOE's [Office of Accountability](#) with any questions.

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## 2027 Cohort

The 2027 cohort is now on the [EdData](#) cohort report. Please review the 2027 cohort for accuracy and contact IDOE's [Office of Accountability](#) if you notice any issues.

### Upcoming Dates



Friday, January 26	<a href="#">Choice Scholarship Program Application Opens</a>
Wednesday, January 31	<a href="#">July 2023 - December 2023 Form 9 Report Due</a>
Thursday, February 1	Membership count date for school corporations, charter schools, and eligible Choice schools

<b>Thursday, February 1</b>	Summer School 2024 Estimated Cost Report submission opens
<b>Wednesday, February 7</b>	Initial copy date for membership
<b>Wednesday, February 14</b>	Period 2 membership data certification deadline
<b>Monday, March 4</b>	Period 2 Choice endorsement form deadline

## Additional Resources

- [IDOE's Finance webpage](#)
- [IDOE's Data Exchange webpage](#)
- [Moodle Finance](#)
- [LINK Portal](#)
- [IDOE's Indiana Choice Scholarship Program webpage](#)
- [Moodle Non-Public School Community](#)



## Department News

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- 01/10/24 Secretary Jenner Unanimously Elected as State Board of Education Chair for Fourth Consecutive Year
- 01/09/24 Key Literacy Data Publicly Available for the First Time
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