

# **Required Services Reimbursement Program**

## **Program Guidelines**

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**State Superintendent of Education**

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**REQUIRED SERVICES PROGRAM**  
**Guidelines for Nonpublic Schools**

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**OVERVIEW**

The Required Services Program is intended to reimburse nonpublic schools for the actual cost of performing selected activities. Pursuant to the provisions of La. R.S. 17:361, annual reimbursement of each approved nonpublic school shall be for the actual mandated service, administrative, and clerical costs incurred by such school during the preceding school year in preparing, maintaining, and filing reports, forms and records, and in providing such other administrative and clerical services that are not an integral part of the teaching process as may be required by the State law or regulation or requirement of the State Department of Education, state agency, or local school board.

Participation in the program requires that detailed records be maintained during the current school year documenting the actual amount of time dedicated to the performance of selected services by employees of the nonpublic school. Then, in the subsequent school year, reimbursement may be sought for the total actual cost incurred for these services. The reimbursement form must be submitted to the Louisiana Department of Education no later than September 30<sup>th</sup> each year.

Reimbursement is based on the funds requested, subject to the audit process, and reduced in an amount equal to the appropriation unless funding is provided to meet the total amount requested, less audit adjustments.

For more information regarding this program, contact the Division of Education Finance, Louisiana Department of Education, at (225) 342-8848.

## ELIGIBILITY REQUIREMENTS

**A school must meet the following criteria in order to be eligible to participate in the Required Services Program:**

1. The school must be academically approved *each year* through the *Nonpublic Annual School Report* process.
2. The school must submit verification to the Department of Education that a nondiscriminatory admissions policy is adhered to under the *Brumfield vs. Dodd* guidelines. Once a school is *Brumfield vs. Dodd approved*, this approval is in effect unless revoked by the Board of Elementary and Secondary Education. Remember, your school must submit a modified Exhibit A to the Office of Legislative Services every year.

For more information regarding the *Nonpublic Annual School Report*, contact the Division of School Standards, Accountability, and Assistance at (225) 342-3513. If information is needed regarding the *Brumfield vs. Dodd* approval, contact the Office of Management and Finance at (225) 342-3617.

## SUBMITTING THE REIMBURSEMENT REQUEST FORM

In order to participate in the Required Services Program, a school must submit a reimbursement request form to the Louisiana Department of Education no later than September 30 each year. (See Appendix E or refer to file on diskette.)

A copy of the reimbursement request form or diskette including the file is distributed to all eligible schools near the end of each school year. ***The entire reimbursement request form must be submitted in hardcopy. In addition, schools using the Excel spreadsheets may also submit the completed file on diskette. The diskette must be labeled with the school's name, ID number, school year, and file type. (Refer to Appendix F for more detailed instructions on using the diskette.)***

The Department of Education encourages all schools to take advantage of technology and use computers to complete the forms. Use of the computer spreadsheets improves accuracy and saves time for both the school and the Department. If a school is interested in utilizing the diskette for the first time, the principal should contact the Division of Education Finance to request one. The Department currently uses Microsoft Excel 97 on IBM-compatible computers. However, if the school needs a lower version of either program, the Department will do its best to accommodate the school.

### **Note**

According to L.R.S. 44:1 and 44:31, the Required Services Reimbursement Claim form and all supporting documentation are public records.

## DETERMINING ACTUAL COST

*Actual cost*, the amount for which reimbursement may be sought, is defined as the *hourly salary rate* of the school employees who were involved in providing the services *multiplied* by the *actual time* dedicated by these same employees to performing these activities.

The following items must exist in order to determine the actual cost for which reimbursement may be requested:

1. Eligible employees must be identified and listed on the reimbursement form. **(Appendix A)**
2. The annual salary of eligible employees must be included on the reimbursement form.
3. For schools not using the diskette and for certain groups of eligible employees, hourly salary rates must be determined. **(Appendix B)**  
  
*For schools using the diskette, the hourly salary rate of salaried, full-time employees will be calculated automatically. The hourly salary rate of part-time employees must be provided.*
4. The *actual* amount of time dedicated to performing eligible services must be recorded. **(Appendix C)**
5. Reimbursable services must be identified. **(Appendix D)**

Upon completion of the form, the Administrator or Principal of the school must sign the cover page as evidence of the following:

*I hereby certify that the activities for which reimbursement is requested are mandated by State Law or regulation or requirement of state department, state agency, or local school board; are not an integral part of the teaching process; were actually performed by employees of this school and I understand that false statements will be subject to civil and criminal penalties.*

## SUMMARY TIME RECORD FORM

The form entitled the *SUMMARY TIME RECORD FORM (Appendix E.3)* must be submitted along with the Required Services Reimbursement Request form. Each employee who was included on the reimbursement form is required to complete a separate *SUMMARY TIME RECORD FORM*. This form includes the employee name, position, gross annual salary, school year, and hours dedicated to providing services under each of the eligible categories. The form must be signed by each individual employee affirming the following:

*I hereby certify that I actually performed the services for which reimbursement is sought and that the information submitted by me is true and accurate.*

The *SUMMARY TIME RECORD FORM* does not replace the time log maintained throughout the year. This form must be prepared *in addition to* the time log and essentially summarizes the information contained in the individual time records. The difference between the time log and the *SUMMARY TIME RECORD FORM* is that the latter *must be* submitted with the reimbursement request form. In contrast, the time logs must be submitted for review only if specifically requested by Department staff.

# ***APPENDICES***

***APPENDIX A***  
***IDENTIFICATION OF ELIGIBLE EMPLOYEES***

**The individuals who provided the qualifying services must be identified**

A school shall be reimbursed for only those services performed by a school employee. An *employee* is defined as someone whose salary or wages are paid for by the school. Individuals who perform services at the school but who are paid by contract services *do not* qualify to be included on the reimbursement request.

***Note:***

Teachers who teach *only* religion classes are *not* eligible to be included in the reimbursement request.

Teachers employed to teach only pre-kindergarten classes are *not* eligible to be included in the reimbursement request.

***However,*** if a religion teacher or pre-kindergarten teacher performs qualifying services for students in grades K through 12, then the time associated with these activities *may* be reimbursable. Examples are the official daily attendance recorded in homeroom or first period, transportation duty, and fire drills, etc. in the safety category.

**APPENDIX B**  
**CALCULATION OF HOURLY SALARY RATES**

The hourly salary rate of employees must be calculated according to the following formula:

**HOURLY SALARY RATE = Salary divided by *Hours Employed Per Year***

*Salary* is defined as gross salary *excluding* any cost to the employer for social security, retirement, employee insurance, fringe benefits, or dues.

- Extra pay earned by an employee who is employed to provide before and after school care services *should not* be included in the gross salary amount because these services are being paid for through fees.
- Extra pay earned by an employee for extra duties beyond normal teaching duties *can be* included in the gross salary amount (i.e. English Department Supervisor), although the hours associated with these duties are not reimbursable.
- If an employee is paid an hourly wage instead of a salary, then the hourly pay rate in effect is to be reported on the reimbursement form.

*Hours Employed Per Year* is defined as

- a. **Administrators:** 50-week per year schedule, 40 hours per week, or 2,000 hours.
- b. **Teachers, Guidance Counselors, Librarians:** 180 days, six and one-half hours daily, or 1,170 hours.
- c. **Nonprofessional Support/Part-time Employees (Secretarial, Maintenance, etc.):** actual number of hours worked in a regular school year.

## APPENDIX C HOW TO MAINTAIN TIME RECORDS

**Time records must be maintained to document the *actual* amount of time dedicated to performing eligible services.**

- Each employee on a daily basis must maintain a record of actual time spent performing qualifying services. Records may not be maintained on a summary or quarterly basis.
- The time record prepared must clearly state the employee's name, position, school year, month/day/year, categories of services, and hours dedicated to each service.
- Time should be recorded on each day that services were provided. It is unacceptable to record time on the first day of the month, for example, and then draw a line across the page to indicate that this identical amount of time was spent each day.
- Time records should cover the entire school year from August until *the end of school*. ***For 12-month employees (administrators), time records should also be maintained during the summer.*** Activities that take place during the months of June, July, and August should be included on the reimbursement request for the following school year.
- Time dedicated to completing the reimbursement request form may *not* be included as time requested for reimbursement.

## ***APPENDIX D***

### **CATEGORIES OF SERVICES**

The intent of the Required Services Program is to reimburse nonpublic schools for performing selected activities required by State law, or regulation or requirement of a state department, state agency, or local school board. These activities are not an integral part of the teaching process, and involve primarily data collection, report preparation, and various extraordinary services provided to students in grades K - 12.

A nonpublic school shall *not* be eligible for reimbursement for any required services when the costs of such services are paid for by *any other public funds*. For example, any teacher who provides services at the school, but whose salary is paid for by the local public school district funds is *not* eligible to be included in the reimbursement request.

The following is a description of each category of services that qualify for reimbursement:

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#### **1. PUPIL ATTENDANCE:**

Definition: Activities associated with the collection of attendance data required to be reported in the Nonpublic Schools Annual Statistical Report. Such data includes

#### **REIMBURSABLE ACTIVITIES - PUPIL ATTENDANCE**

##### **Administrator(s)**

Supervising collection of attendance data  
Orienting new teachers on attendance regulations  
Supervising preparation of Nonpublic Schools Annual Statistical Report

##### **Teachers**

Collecting and recording daily attendance (homeroom or first period only)  
Reporting daily attendance to the office  
Compiling summary attendance data

##### **Nonprofessional Support Person(s)**

Collecting and summarizing pupil attendance data  
Typing and filing six-week attendance summaries (or nine week attendance summaries)  
Assisting in preparation of Nonpublic Schools Annual Statistical Report

#### **NONREIMBURSABLE ACTIVITIES - PUPIL ATTENDANCE**

*Collecting attendance during all class periods*  
*Producing multiple, daily absentee reports*  
*Contacting parents regarding student absenteeism/tardiness*  
*Tabulating student tardy reports*  
*Taking homeroom attendance by Pre-K and religion teachers*

## **2. RECORD MAINTENANCE:**

Definition: Activities associated with the maintenance of student cumulative records as required by *Bulletin 741* and Senate Bill 252 passed in the 1999 Regular Session of the Legislature for Nonpublic Schools.

### **REIMBURSABLE ACTIVITIES - RECORD MAINTENANCE**

#### **Administrator(s)**

Reviewing students' cumulative folders and updating records  
Reviewing graduation requirements and completion of transcripts  
Preparing Certificates of High School Credits (transcripts)  
Preparing and submitting electronically all student transcripts to the LDOE as required by Louisiana Administrative Code Title 28, Part IV, Chapter 17, Section 1703  
Preparing paperwork to obtain criminal history and fingerprinting of school employees  
Organizing the administration of visual and auditory testing  
Notifying Public Schools of enrollment of public school students into non-public schools as required by Senate Bill 252/ Act No. 408 of the 1999 Regular Session of the Legislature

#### **Teachers**

Updating cumulative folders with current student information  
Preparing progress reports  
Averaging/recording grades in report cards and posting deficiency slips for each 6 or 9-week period  
Distributing, collecting and updating census/health cards (may be performed by nurse)  
Administering of visual and auditory testing

#### **Guidance Counselor**

Updating and reviewing students' cumulative folders and records  
Preparing and submitting electronically all student transcripts to the LDOE as required by Louisiana Administrative Code Title 28, Part IV, Chapter 17, Section 1703

#### **Nonprofessional Support Person(s)**

Establishing/maintaining student cumulative folders  
Typing, filing and copying student information  
Assisting in preparation of Certificates of High School Credits (transcripts)  
Assisting with paperwork to obtain criminal history and fingerprinting of school employees  
Assisting with the administration of visual and auditory testing  
Notifying Public Schools of enrollment of public school students into non-public schools as required by Senate Bill 252/ Act No. 408 of the 1999 Regular Session of the Legislature  
Preparing and submitting electronically all student transcripts to the LDOE as required by Louisiana Administrative Code Title 28, Part IV, Chapter 17, Section 1703

### **NONREIMBURSABLE ACTIVITIES - RECORD MAINTENANCE**

*Grading tests and homework*

*Writing detailed narratives or reports relating to student performance*

*Meeting with parents to discuss report cards*

### **3. NONPUBLIC ANNUAL SCHOOL REPORT:**

Definition: Activities associated with the preparation of the Nonpublic Annual School Report. This report includes such data as

#### **REIMBURSABLE ACTIVITIES - NON PUBLIC ANNUAL SCHOOL REPORT**

##### **Administrator(s)**

Compiling student enrollment statistics

Reviewing school curriculum for compliance with *Nonpublic School Bulletin 741*

Compiling faculty data (i.e. no. of years experience, degree level, certification info, professional training)

Compiling statistics on number of library books, magazines, and periodicals

Compiling course schedule information

##### **Teachers**

Providing schedule information on students and classes

Furnishing completed certification information as required

##### **Nonprofessional Support Person(s)**

Assisting in compilation of data for Nonpublic Annual School Report

Completing and typing Nonpublic Annual School Report

#### **NONREIMBURSABLE ACTIVITIES - NONPUBLIC ANNUAL SCHOOL REPORT**

*Preparing any other reports*

*Preparing the Required Services Reimbursement Request form*

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### **4. TRANSPORTATION:**

Definition: Activities associated with planning or scheduling transportation services for students, and monitoring the loading and unloading of students from buses or cars.

#### **REIMBURSABLE ACTIVITIES - TRANSPORTATION**

##### **Administrator(s)**

Supervising the school transportation program (buses, car pools, walkers)

Developing and distributing staff duty schedules

Completing required information to local public school district involving nonpublic students utilizing public school transportation

Obtaining and distributing bus tickets for school Regional Transit authority buses

Supervising loading and unloading of students into/from buses and carpools

Supervising students who walk to and from school

##### **Teachers**

Supervising loading and unloading of students into/from buses and carpools

Instructing students on safe loading, unloading and riding practices

Supervising students who walk to and from school

**Nonprofessional Support Person(s)**

Compiling and maintaining bus transportation information  
Supervising loading and unloading of students into/from buses and carpools  
Supervising students who walk to and from school  
Inspecting school-owned buses annually

**NONREIMBURSABLE ACTIVITIES - TRANSPORTATION**

*Supervising students in before or after school programs*  
*Supervising students before school who are waiting to go to class*  
*Handling discipline issues involving students who ride buses*  
*Transporting students on field trips and athletic events*  
*Routine, daily inspections of school-owned buses*

**5. SAFETY:**

Definition: Activities associated with ensuring the school is in compliance with all applicable local, state, or federal government health and safety regulation. These activities may include safety drills (fire, tornado, hurricane, and chemical spills), testing (pesticide, lead, asbestos), and health and safety standards.

**REIMBURSABLE ACTIVITIES - SAFETY**

**Administrator(s)**

Developing and administering safety program for faculty and students  
Establishing and carrying out procedures for testing lead, asbestos, and pesticides in accordance with local, state, and federal government health and safety standards  
Establishing agriculture certification program  
Supervising pesticide application through the Integrated Pest Management (IPM) with La. Dept. of Agriculture certification program  
Scheduling and monitoring fire, tornado, hurricane, and chemical spill drills  
Scheduling gas line inspections to be performed by federal, state, or local agency

**Teachers**

Orienting students to school safety program  
Participating in and documenting safety drills

**Nonprofessional Support Person(s)**

Maintaining documentation of safety drills  
Maintaining documentation of hazardous substance testing  
Completing reports as needed

**NONREIMBURSABLE ACTIVITIES - SAFETY**

*Supervising/performing routine maintenance, commons duty, hall duty, bathroom duty, or recess duty*  
*Scheduling drug-free seminars*  
*Inspecting and maintaining fire extinguishers by private companies*  
*Inspecting school grounds as required by school or diocese*

## **6. TEXTBOOKS AND SUPPLIES:**

Definition: Activities associated with the State-funded textbook/supply allocation provided to nonpublic schools through the local public school board.

### **REIMBURSABLE ACTIVITIES - TEXTBOOKS AND SUPPLIES**

#### **Administrator(s)**

Notifying department heads and/or teachers of state textbook/supplies allocations  
Examining instructional materials under consideration for purchase with State funds  
Conducting faculty meetings to finalize selections to be ordered with State funds  
Coordinating and approving State Library Book orders

#### **Teachers**

Identifying and submitting selections of textbooks/instructional supplies needed

#### **Nonprofessional Support Person(s)**

Preparing textbook/instructional supplies orders  
Pick-up/receipt of textbook/instructional supplies orders  
Issuing textbook/instructional supplies purchased through the local parish/city school district with the \$27.02 per pupil allowance of state monies.

### **NONREIMBURSABLE ACTIVITIES - TEXTBOOKS AND SUPPLIES**

*Ordering supplies or textbooks that are paid for with school generated funds*  
*Ordering supplies or textbooks that are paid for with 8g grant textbook monies*  
*Distributing/collecting textbooks that are paid for with school generated funds and /or 8g grant textbook monies.*  
*Documenting time spent ordering supplies under the Teachers Supply Fund*

## **7. TITLES I, II, IV, and VI:**

Definition: Activities associated with the administration of the Federally funded programs under Titles I, II, IV, and VI. These activities may include completing locator card information on students or determining their eligibility status.

### **REIMBURSABLE ACTIVITIES - TITLES I, II, IV, And VI**

#### **Administrator(s)**

Attending planning meetings and faculty orientations for programs  
Preparing an application to obtain funds from programs in consultation with the public school district  
Identifying students and determining eligibility status (Title I)  
Coordinating the obtaining of services at school for identified students (Title I)  
Preparing proposed projects for staff development funds (Title II)  
Coordinating staff development projects and evaluating outcomes (Title II)  
Identifying instructional materials needed for drug-free and violence prevention classes (Title IV)

### **Teachers**

Consulting with Title I teacher in preparation of teaching materials  
Assessing and reviewing participants in Title I program  
Conducting conferences with parents on achievement in Title I program  
Selecting instructional materials needed for drug-free and violence prevention classes (Title IV)

### **Librarian**

Preparing library book orders (Title VI)  
Preparing equipment orders (Title VI)  
Cataloging and labeling books and equipment (Title VI)

### **Nonprofessional Support Person(s)**

Recording and maintaining individual student information (Title I)  
Ordering instructional materials for drug-free and violence prevention classes (Title IV)  
Ordering instructional materials and/or equipment and verifying goods received (Title VI)

### **NONREIMBURSABLE ACTIVITIES - TITLES I, II, IV, and VI**

*Developing and/or administering special assignments for participants (Title I)*  
*Attending staff development classes, courses, or conferences (Title II)*  
*Maintaining circulation records in the library*

## **8. SPECIAL EDUCATION:**

Definition: Activities associated with identifying students in need of one of the 16 identified Special Education services or 504 related assistive services through the process prescribed by the local public school system, and State/Federal guidelines.

### **REIMBURSABLE ACTIVITIES - SPECIAL EDUCATION**

#### **Administrator(s)**

Notifying/consulting parents of children identified as possibly in need of Special Education services  
Notifying/consulting parents of children identified as possibly in need of services under 504  
Providing referrals to Parish Pupil Appraisal Coordinator/School Building Level Committee  
Consulting with teachers and evaluation teams to discuss objectives  
Completing Annual Special Education Program Reports

#### **Teachers**

Consulting with evaluation teams to discuss objectives for special education/504 services  
Serving on School Building Level Committee  
Preparing the Individualized Education Plan (IEP)  
Assessing students' progress for the annual update of the IEP  
Completing referral forms to the local public school board for services

#### **Nonprofessional Support Person(s)**

Distributing Child Search forms  
Maintaining file information on participating students

**NONREIMBURSABLE ACTIVITIES - SPECIAL EDUCATION**

*Providing one of the 16 identified special education services under Other Exceptionalities or Gifted/Talented programs*

*Providing the prescribed student assistance services under 504 guidelines*

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**9. TEACHER CERTIFICATION:**

Definition: Activities associated with the paperwork required for teachers to obtain certification for the first time, or maintain and update certification information.

**REIMBURSABLE ACTIVITIES - TEACHER CERTIFICATION**

**Administrator(s)**

Reviewing certification requirements of faculty to ensure compliance with *Nonpublic School Bulletin 741* regulations

**Teachers**

Updating certification information as needed

**Nonprofessional Support Person(s)**

Updating and maintaining faculty certification information

**NONREIMBURSABLE ACTIVITIES - TEACHER CERTIFICATION**

*Attending university classes necessary to complete teaching certification requirements*

**10. CONTINUING EDUCATION:**

Definition: Activities associated with regularly scheduled faculty meetings.

**REIMBURSABLE ACTIVITIES - CONTINUING EDUCATION**

**Administrator(s)**

Scheduling and planning regularly scheduled faculty meeting(s)

Attending faculty meeting(s), school-wide or departmental

**Teachers**

Attending faculty meeting(s), school-wide or departmental

**Nonprofessional Support Person(s)**

Taking minutes for regularly scheduled faculty meeting(s)

Typing meeting agendas or minutes

**NONREIMBURSABLE ACTIVITIES - CONTINUING EDUCATION**

*Attending university classes, professional development courses or conferences*

*Attending faculty meetings to discuss religious issues*

*Attending Administrator and Principals meetings*

**11. FOOD AND NUTRITION:**

Definition: Activities associated with the administration of the Federally-funded School Lunch Program.

## **REIMBURSABLE ACTIVITIES - FOOD AND NUTRITION**

### **Administrator(s)**

Supervising administration of the lunch program, including supervising lunch room employees and meeting with cafeteria manager

Distributing and approving all free and reduced price lunch applications

Reviewing program objectives and preparing reports

Reviewing monthly bank statements

### **Teachers**

Distributing/collecting free and reduced price lunch applications to students

Determining the daily lunch count at the beginning of the school day

Assisting in recording student id numbers for those students eating lunch

### **Nonprofessional Support Person(s)**

Preparing participating student lunch list

Recording lunch payments and preparing receipts

Maintaining lunch program information

## **NONREIMBURSABLE ACTIVITIES - FOOD AND NUTRITION**

*Supervising students' behavior in the cafeteria ("lunch duty")*

*Supervising lunch program not associated with the Federal school lunch program*

## **APPENDIX E REQUIRED SUPPORTING DOCUMENTATION**

Reimbursement requests shall not be approved for payment unless they are audited to ensure that such payment is lawful and proper. Each school is therefore required to maintain documentation to support the costs incurred in providing the services for which reimbursement is requested. The following list of records must be prepared and maintained and must be available for review by the Department of Education staff upon request:

1. **TIME RECORD.** A daily time record for each employee included on the reimbursement form showing the amount of time spent providing services.
2. **SALARY RECORD.** Contract and payroll records for each employee for whose time reimbursement is requested.
3. **CATEGORIES OF SERVICES**
  - a. **Pupil Attendance.** Rollbooks and attendance reports and list of homeroom or first period teachers
  - b. **Record Maintenance.** Student Cumulative Records
  - c. **Nonpublic Annual School Report.** Copy of report
  - d. **Transportation.** “Duty Schedule”, map of school with notations on plans for loading and unloading
  - e. **Safety.** Testing reports, documentation of safety drills
  - f. **Textbooks and Supplies.** Invoices
  - g. **Title I,II,IV,VI.** Information on eligible students/professional development plans/invoices
  - h. **Special Education.** Student Referrals/Assessments/IEPs and list of School Building Level Committee members
  - i. **Teacher Certification.** Current teacher certificates
  - j. **Continuing Education.** Agendas and minutes of faculty meetings
  - k. **Food and Nutrition.** Lunch counts, menus, participation statistics

## REQUIRED SERVICES REIMBURSEMENT FORM INSTRUCTIONS

1. On the form enter the names of the school employees who actually provided the eligible services throughout the school year. Employees should be categorized according to the duties and responsibilities each performs for the majority of the time employed. For example, an Assistant Principal who also teaches two classes would be classified as an Administrator, since the assistant principal duties comprise 50 percent or greater of the assigned responsibilities.
2. Calculate the gross salary of each eligible employee. The salary should include the annual base salary plus any pay earned for extra duties. For example, extra compensation earned for being employed as a department chairman, assistant administrator, or elective course instructor such as band, chorus, etc. may be included in the gross salary. *Excluded* from the gross salary should be any cost to the employer for social security, retirement, employee insurance dues, or other fringe benefits.

**NOTE:** An employee whose salary is paid for *entirely* with *public* funds from another *public* program may *not* be included in the Required Services Program reimbursement request. A person who works in return for tuition and who does not receive salary or wages from the school should not be included in the Required Services Program reimbursement request.

3. Calculate the hourly rate paid to each employee by dividing the gross salary by the applicable hours worked as follows:

**Administrators:** 2000 hours (50 weeks per year, 40 hours per week)

**Teachers, guidance counselors, librarians:** 1170 hours (180 days, 6 2 hours a day)

**Note:** *The hours described above for full-time Administrators and Teachers must be used in the hourly rate calculation.*

**Nonprofessional support personnel:** actual number of hours employed in a regular week.

The hourly rate for part-time employees who are paid a salary should be computed based on the gross annual salary divided by the actual number of hours employed annually.

If an employee is paid an hourly wage, not a salary, then the hourly wage amount should be reported on the reimbursement form.

4. Enter the number of hours of service for each employee in each applicable category.
5. Multiply the number of hours of service by the hourly rate to determine a total amount for each employee in each category.
6. Add the amounts by category to determine the total amount requested for reimbursement.

7. The summary page of the form should be signed by the school administrator.
8. The form should be returned to the Louisiana Department of Education **no later than September 30<sup>th</sup> of each year** at the following address:

**Division of Education Finance  
Louisiana Department of Education  
P. O. Box 94064  
Baton Rouge, LA 70804-9064  
Attention: State Audit Section**

**REQUIRED SERVICES PROGRAM**  
***SUMMARY TIME RECORD FORM***

INSTRUCTIONS

1. Each employee who was included on the reimbursement request form is required to complete a separate *SUMMARY TIME RECORD FORM*.
2. Enter the employee name, position, gross annual salary, school year, and hours dedicated to providing services under each of the eligible categories on the form.
3. The form must be signed and dated by each individual employee affirming the following:  
  
*I hereby certify that I actually performed the services for which reimbursement is sought and that the information submitted by me is true and accurate.*
4. The *SUMMARY TIME RECORD FORM* *must be* submitted along with the Required Services Reimbursement Request form to the following address:

Division of Education Finance  
Louisiana Department of Education  
P. O. Box 94064  
Baton Rouge, LA 70804-9064  
Attention: State Audit Section

***NOTE:*** The *SUMMARY TIME RECORD FORM* *does not* replace the time log maintained throughout the year. This form, which must be prepared *in addition to* the time log, essentially summarizes the information contained in the individual time records. The difference between the time log and the *SUMMARY TIME RECORD FORM* is that the latter *must be* submitted with the reimbursement request form. In contrast, the time logs must be maintained at the school and submitted to the Department only if specifically requested by Department staff. ***When recording time on logs and compiling this time for the summary time record form, the preparer must understand that due care and diligence are vital.***

## **APPENDIX F**

### **GENERAL INSTRUCTIONS**

The Department of Education will provide instructions each year so that the same files can be reused. Schools will receive directions needed to update files received on diskette from the previous school year Microsoft Excel application files. This procedure will accommodate all schools and will also allow for schools to update information more quickly and eliminate the use of diskettes. *(If in the future, a school upgrades to a newer version of software before the Department, the principal must remember to save the file in its original format.)*

After completing the form, the principal should make the following copies:

1. School's Copy: At least one copy on the school's hard drive, a copy on diskette, and a printed hard copy.
2. Department of Education Copy: The Department will need a printed copy of the entire completed form from all schools. Those schools that utilize the diskette may also submit their form on diskette. *As an extra precaution to protect the diskette, the principal should use a diskette mailer. Note: diskettes will not be returned.*

The Department of Education encourages all schools to take advantage of technology and use computers to complete the forms. Use of the spreadsheet improves accuracy and saves time for both the school and the Department. If a school has not previously requested a diskette and would like to do so, the principal should call the audit staff at (225) 342-8848; they will send one. The State Department of Education currently uses Microsoft Excel 2000 on IBM-compatible computers. However, if a school needs a lower version of the program, the Department will do its best to accommodate.

We appreciate your cooperation.

## *Instructions for the Required Services Program Diskette*

1. Using the diskette from the previous school year, open the file named “RQSblank.xls” containing the Required Services Reimbursement form. ***DO NOT ENTER DATA INTO THIS ORIGINAL FILE.*** Change the year on the first page of the Required Services Reimbursement form. For example, if the year states 2002-2003, change to 2003-2004. It is standard practice to save the file on diskette as well as on your hard drive. Name this file “RQSblank.xls” or something similar. If you anticipate few changes in your personnel from year to year, you may wish to enter their names into this blank spreadsheet to be copied. However, ***do not*** enter salaries or hours into this spreadsheet; enter these each year to ensure accuracy.
2. Next, make another copy, and name it “RQS0001.xls.” This file will be used to enter the school’s Required Services data for the current year.  
Go to **FILE**.  
**Save As**  
and save the original file under the *new* name, “RQS0001.xls. As always, it would be a good idea to save this file on your C-drive and on a diskette. ***(If in the future, your school upgrades to a newer version of software before our department, please remember to save the file in its original format so that we can open it.)***
3. Open “RQS0001.xls.” This file should contain only *your school’s* information for the *current school year*.
4. This entire document is called a *workbook*; it contains two *worksheets* that lay over one another, depending on which you select to be active.
  - Click on the “**Summary**” tab at the lower left corner of screen to make it your active worksheet.
  - Complete the top section of the **Summary Page** (Federal ID#, Name of School, etc.) by placing the cursor on the appropriate blank line and entering the data.
  - The “**Summary of Totals**” section will be automatically calculated when the corresponding totals are calculated in each category on the separate worksheet located in the **Form** section. Data cannot be manually entered in this section of the summary page.
5. To enter data in the second worksheet, click on the **Form** tab, which is at the lower left corner of the screen to the left of the **Summary** tab.
  - There is only one sheet for the **Form**. The names of each administrator, full-time teacher, librarian, and counselor and their annual salary need be entered **ONCE**. The hourly rate for this group of personnel will automatically be calculated in the form.
  - **After entering the appropriate *annual* salary for the administrators, teachers, librarian, and counselors, in Column C, enter the hours of service for each appropriate category across the row. Once the actual hours of service for each category have been entered, the dollar amount for that category will also automatically compute.**
  - The names of each part-time teacher, teacher aide, and support staff and their annual salary also need be entered **only ONCE**. However, the hourly rate for this group of personnel will **NOT** be automatically calculated in the form. It will be necessary for you to calculate the hourly rate for this group of personnel: divide the annual salary of each person in this group by the total number of hours he or she works annually. Enter the result of this calculation in Column D for each employee. Next, enter the hours of service for each appropriate category across the row. Once the actual hours of service for each category have been entered, the dollar amount for that category will also automatically compute.
  - Subtotals and Totals will be *automatically calculated and summarized at the end of the worksheet*.

6. Upon completion of the worksheets, the entire workbook should be printed including **the Summary Page and the Form**. Also, the **appropriate school official must sign the Summary Page**. Please make the following copies:

- **SCHOOL'S COPIES:** Make at least one copy on your hard drive, a copy on diskette, and also print a hard copy for the school's records.
- **DEPARTMENT OF EDUCATION COPIES:** The Department will need a printed copy of the entire completed form from all schools. Those schools that utilize the diskette will also submit their form on diskette. *As an extra precaution to protect the diskette, please use a diskette mailer.* **Note: your diskette will not be returned.**

- To print the **Summary Page:**
  - Click on the **Summary tab**.
  - Click on **File**.
  - Click on **Page Set Up**.
  - Click **Sheet**.
  - Change print area block to read **A1:N40**.
  - Click **Print**.

- To print the **Form.**
  - Click on the **Form tab**.
  - Click on **File**.
  - Click on **Page Set Up**.
  - Click **Sheet**.
  - Change print area block to read **A4:Z221**.
  - Click **Print**.