



**M E M O R A N D U M**

**TO: Business Managers, Business Officers, Treasurers, and Charter School Sponsors**

**FROM: Melissa K. Ambre, Director  
Office of School Finance**

**SUBJECT: 2017-2018 Curricular Reimbursement Data Submission**

**DATE: June 2017**

This communication is provided to inform school officials of the process for submitting curricular reimbursement information for the 2017-2018 school year. Please read the memorandum in its entirety. Any references to curricular material in this memorandum is a reference to textbooks in addition to other classifications found under I.C. 20-20-5.5.

**Summary Cost and Reimbursement Claim Form 2017-2018**

Under Indiana Code (IC) 20-33-5-9.5, curricular material reimbursement by the state to school corporations, charter schools and accredited nonpublic schools for school year 2017-2018 will be based on the amount appropriated for the state fiscal year divided by the number of eligible accredited public and nonpublic school students for which reimbursement was requested in the previous calendar year. Under current law, charter schools funded under the Adult Learner program are not eligible for curricular reimbursement.

School corporations, charter schools, and accredited nonpublic schools will receive the reimbursement on a per student basis. The Department will calculate the reimbursement amount for each school corporation, charter school, and nonpublic school based on the number of eligible students reported on the “Summary of Costs and Reimbursement Claim Form 2017-2018 School Curricular Material Costs and Eligible Student Counts” and the student level data submitted electronically between **October 2 and October 31, 2017**, which is the final collection date. **Both student level and claim data must be submitted on or before October 31.**

If a parent of a child or an emancipated minor who is enrolled in a public school, kindergarten or grades 1 through 12, meets the financial eligibility standards, the parent or emancipated minor may not be required to pay the fees for curricular materials, supplies or other required class fees.” A school corporation may apply for curricular reimbursement for these students under IC 20-33-5-3.

**Reimbursement Requests**

Under IC 20-33-5-7 for a school corporation or charter school to receive some level of reimbursement for some or all of the costs incurred during the school year in providing curricular material assistance to eligible students, claim information must be filed on or before **October 31** that includes the (1)

number of students who are enrolled in that school and who are eligible for assistance; (2) costs incurred by the school corporation in providing

- a. Curricular materials
- b. Workbooks, digital content, and consumable curricular material that are used by students for not more than one school year;
- c. Developmentally appropriate material for instruction in grades K-3 as adopted by the governing body and other information required by the department.

Indiana Code 20-18-2-2.7 defines curricular material as “systematically organized material designed to provide a specific level of instruction in a subject matter category, including:

- (1) books;
- (2) hardware that will be consumed, accessed, or used by a single student during a semester or school year;
- (3) computer software; and
- (4) digital content.”

### **Retrieving and Reporting Individual Student Information**

Officials should review the curricular material data layout (DOE-TB) in the Data Collection and Reporting Community of the Learning Connection. The DOE-TB provides specific instructions for submitting student level data and a reimbursement claim.

New validations and a “source” file have been added for the 2017-2018 and can be found in the DOE-TB layout. Upon completion of all the student information, submit the student information file through the STN Application Center under the Data Transfer Menu > Textbook Reimbursement Claim Form. During the collection window you are required to submit a file and review the processing results for errors. If there are errors or inaccuracies, you may correct the data and resubmit the file until the end of the day of the final collection date. When all student data has been submitted, officials may complete the Summary Claim form with the total curricular costs at each grade level.

### **Completing the Summary Claim Form for 2017-2018**

All student data must be submitted prior to completion of the Summary Claim Form. Once the student data has been submitted our system will aggregate the student counts by grade level. When you access the summary claim form from the secure STN Application Center the number of students per grade level will be pre-populated in the form for you based on the student information that was submitted by staff at your school corporation. On or before October 31, 2017, you will then need to input the cost of curricular materials, workbooks, etc. into the claim by grade level. The claim form can be found under the Data Transfer> Input Forms > Curricular Material Reimbursement Claim Form.

If the count of students is updated, you must also update the summary claim form. If you do not update both pieces of information, the student counts and claim costs will be out of balance.

**Participating school corporations and charter schools must submit eligible student count information by grade level and curricular material cost information.** You should report students being educated in grades KG-12 who are enrolled on October 2, 2017. The required collection period begins at 8:00 a.m. on **October 2, 2017, and ends October 31, 2017**, at 11:59 p.m. (EST) for both student level and curricular cost data. The required sign-off period begins **November 1, 2017**, at 8:00 a.m. and ends **November 8, 2017**, at 11:59 p.m. EST. The report must reflect the report totals in the STN Application Center. When a collection closes and the data are considered final by the State; no corrections or additions are allowed.

### Upload Process

Continuing with the 2017-2018 curricular data collection, the Department will utilize a download and upload process for submission of the signed Public Curricular Material Costs Claim Form. Instructions on the upload process are described below and can be found in the curricular layout (DOE-TB) in the Data Collection and Reporting Community of the Learning Connection. The Department no longer accepts hard copy information.

Instructions– Schools must print, sign and upload the signed Claim Form Report into the STN Application Center.

- You must complete the sign off in Collection Management (under data verification);
- Print the Claim Form located under Data Transfer>Input Forms>Curricular Reimbursement Claim Form
- Scan the Signed Document;
- Upload the Signed Document under Administration>Upload Signed Summary Report; and
- Verify the document has been uploaded correctly go back to Collection Management to find in your sign off box the word **SUBMITTED**.

If you have questions about the submission of curricular reimbursement information, please contact staff in the Office of School Finance at 317-232-0840. Questions concerning curricular material reimbursement can be emailed to doetextbooks@doe.in.gov.

## School Curricular Material Cost Instructions

### Reimbursable Items

- 1) *Curricular materials (including curricular material used in special education and gifted and talented classes)*

I.C. 20-18-2-2.7 defines curricular material as “systematically organized material designed to provide a specific level of instruction in a subject matter category, including: 1) books, (2) hardware that will be consumed, accessed, or used by a single student during a semester or school year; (3) computer software; and (4) digital content.”

To be reflected as a cost, the curricular material must have been adopted by the school governing body for use.

- 2) *Workbooks (including workbooks used in special education and gifted and talented classes)*

The term "workbook" means consumable, copyrighted material used by students for no more than one (1) school year which supplements curricular material and is designed to guide the work of a student by providing questions, exercises, etc.

- 3) *Consumable Curricular Material (including consumable curricular material used in special education and gifted and talented classes)*

The term "consumable curricular material" means a consumable core instructional curricular material used by students for no more than one (1) school year. In addition, consumable kit materials that are part of an adopted curricular material are considered part of this category.

- 4) *Consumable Instructional Materials used in special education and gifted and talented classes.*

The term "consumable instructional material" means instructional material used by students for no more than one (1) school year. This category is for special education and gifted and talented classes ONLY.

- 5) *Developmentally Appropriate Material for instruction in Kindergarten through Grade 3, laboratories, and children's literature programs.*

The term "developmentally appropriate material" means material that is used instead of the purchase of a curricular material.

Grade 1, 2, and 3 developmentally appropriate materials are for special education and gifted and talented classes as adopted by the governing body.

**Summary Cost and Reimbursement Claim Form**  
**Instructions for 2017-2018**

***Column 1 - Grade Level***

- a. Grade levels for Kindergarten through Grade 12 are represented.

***Column 2 - Number of Eligible Students (Pre-populated based on your student data submitted).***

- a. Only students who have met the eligibility determination for approved free or reduced price meals are eligible for curricular assistance.
- b. All eligible students, including eligible gifted and talented and special education students must be classified by grade.
- c. Each school corporation and charter school must maintain complete and accurate information concerning the number of students determined to be eligible for assistance for State Board of Accounts audit.
- d. School officials may only claim students, who meet the financial eligibility standards found in IC 20-33-5.

***Column 3 - Total Cost of Curricular Materials***

- a. This column reflects the cost of providing curricular materials to eligible students at each grade level. The curricular materials for open category curricular material and curricular materials used in gifted and talented and special education should have been approved by the local governing body. Do NOT include curricular material rental costs or class fees of any type.
- b. Prorate curricular materials that are shared by students and curricular materials used on a quarter or semester basis.
- c. Kindergarten curricular materials should be included as costs if the material has been adopted for use by the local governing body.
- d. Include the total cost of providing curricular materials for all eligible students at the appropriate grade level.
- e. Curricular materials which have been adopted by the governing body and curricular materials for approved instructional open categories, gifted and talented education programs, and special education programs are the ONLY curricular materials that should be listed.

- f. Supplies or class fees should not be included in this column. These expenses are the responsibility of the local school corporation and not included as costs on the form.

***Column 4 - Total Cost of Consumable Curricular Materials and Workbooks***

- a. Consumable curricular materials are those which have been adopted by the governing body as well as those consumable curricular materials for approved instructional open categories, gifted and talented education programs, and special education programs which have been adopted for use by the local school corporation and are used by students for no more than one (1) school year. These books might include approved primary grade math books, handwriting books, and similar curricular materials.

Consumable kit materials that are part of an adopted (or waived) curricular material are included on the form.

Workbooks are those consumable, copyrighted materials designed to supplement curricular materials and guide the work of a student by providing questions, exercises, etc. Workbooks are used by students for no more than one (1) school year.

- b. Provide the total cost of consumable curricular materials and workbooks for all eligible students at the appropriate grade level.

***Column 5 and Column 6 - Consumable Instructional Materials***

- a. Only consumable instructional materials for gifted and talented and special education students may be listed.
- b. School officials must maintain complete and accurate records regarding the cost of instructional materials.
- c. For school corporations sending students to a special education cooperative and being billed a flat instructional fee (not a tuition fee) for those students, the total fee may be listed as instructional materials and the curricular material/workbook breakdown will not be necessary. You must maintain a bill from the cooperative that reflects the instructional fee charged and paid.
- d. Provide the total cost of consumable instructional materials for all eligible gifted and talented and special education students at the appropriate grade level in the appropriate column.

***Column 7 - Developmentally Appropriate Material***

- a. Developmentally appropriate material means material that is used instead of the purchase of a curricular material.
- b. In an adopted category, the cost of developmentally appropriate material may be claimed for Kindergarten through Grade 3, laboratories, and children's literature programs.

In open categories, gifted and talented education programs, and special education programs, if a curricular material is not purchased for a course, the developmentally appropriate material may be claimed for Kindergarten through Grade 3, laboratories, and children's literature programs.

- c. School officials must maintain complete and accurate records regarding the cost of developmentally appropriate materials.
- d. Provide the total cost of developmentally appropriate material for all eligible students.

***Column 8 - Total Costs (3+ 4 + 5 + 6 + 7)***

- a. Column 8 is the sum of Columns 3, 4, 5, 6, and 7. This represents, by grade, the cost of providing curricular materials.