



# Indiana Department of Education

Dr. Katie Jenner, Secretary of Education

To: Business Managers, Business Officers, Treasurers, and Charter School Sponsors

From: Melissa K. Ambre, Senior Director, Office of School Finance

Subject: 2022-2023 Curricular Material Summary Cost Reimbursement Claim Form Instructions

Date: September 16, 2022

This communication is to inform school officials of the process for submitting curricular material reimbursement information for the 2022-2023 school year. Officials will utilize the same submission process used in the previous school year for reporting both student level data and curricular material costs. Any reference to curricular material in this memorandum includes all classifications found under Indiana Code 20-20-5.5.

Under I.C. 20-33-5-9.5, curricular material reimbursement by the state to school corporations, charter schools, and accredited nonpublic schools for school year 2022-2023 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.

The Indiana Department of Education (IDOE) will calculate a per-student reimbursement amount based on the number of eligible students reported in Data Exchange. Additionally, curricular material costs will be captured through a JotForm completed by each school between **Friday, September 30, and Monday, October 31, 2022**, while continually reporting student level data through Data Exchange beginning at the start of the school year through Friday, September 30. Please refer to the Data Exchange Curricular Materials Assistance Reporting guidance in the [Data Knowledge Hub](#) for the student level data submission process.

Curricular materials (including material used in special education and gifted and talented classes) are “systematically organized 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.” (See I.C. 20-18-2-2.7)

Please keep in mind that school food authority personnel can only share applications for curricular material assistance when a parent/guardian has opted into the Curricular Material Assistance Program.



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## **Submission of student-level data**

Schools submit student-level data through the student information system (SIS) or utilizing the Curricular Material Assistance template and validating data in Data Exchange beginning when data submission opens for the 2022-2023 school year through the Friday, September 30 count date using Student School Associations (enrollments), Curricular Material Assistance and Student Program Associations for School Food Services in either Free or Reduced Priced lunch. Additional guidance is found in [Knowledge Hub](#).

1. Student-level data will be aggregated for the grade level student counts.
2. Curricular material assistance counts for certification will be based upon the Friday, September 30 active student school associations (enrollment) records where the primary school is true, and the student is identified with one of the School Food Services programs **and** Curricular Material Assistance program.

## **Verifying student level data in the Validation Portal**

The total number of students reported for curricular material assistance will be reflected in the Validation Portal > October 2022 > Certification. By clicking on the Curricular Material Assistance Report, a summary report appears and provides total counts by school building and grade level. There is data in three columns (Total Enrollment, Excluded, and Total Certified) of the report.

1. Total enrollment is the total number of students enrolled in each grade level.
2. The “Excluded” column represents the total number of students whose records are excluded from the Total Certified count. The issue may be the result of an inactive or no enrollment record in the School Food Service Program. Another issue might be a missing record for the “Student lives with parent/guardian.”
3. Total Certified is the total number of students who were successfully reported as eligible for curricular material assistance. The calculation and reporting of curricular material costs on the JotForm should align to the Total Certified student count.
  - a. If the Total Certified count does not accurately reflect the total number of students eligible for curricular material assistance, please recheck and, if warranted, update records.

## **Submission of curricular material costs**

The process of submitting curricular material costs will be through [JotForm](#). This form will be available beginning Friday, September 30; however, a [sample form](#) is available in Moodle Finance under curricular material reimbursement to help schools begin to pull together required information. The JotForm mimics the sample public school claim form with seven columns of data.

1. Signature information:
  - a. The superintendent and preparer must:
    - i. Sign the JotForm
    - ii. Provide a typed name
    - iii. Include an email address (requested for preparer only)
    - iv. Provide a telephone number \
  - b. Submit signature data at the same time as other claim data.

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2. Submission:
  - a. Upon completion and submission of the JotForm, the preparer will receive an email acknowledging submission. The email includes a snapshot of the data fields.
  - b. Save the email in your files.
3. Printable form:
  - a. Using Internet Explorer, you can print the form, or you can take a screenshot of the JotForm.

## **Tips for completing the JotForm**

1. Grade level student counts are not part of the JotForm. Report student counts in Data Exchange.
2. Amounts:
  - a. When entering amounts, the preparer may input dollars and cents.
  - b. Please report costs for eligible students reported in Data Exchange who requested curricular material assistance on or before Friday, September 30.
3. School corporations that are not requesting curricular material reimbursement:
  - a. If you are not requesting curricular material reimbursement but reported student eligibility as part of free or reduced price lunch, complete all fields in the report.
  - b. In the curricular material costs section, enter one “zero” in a field. \
  - c. If none of the claim form fields has a zero in it, upon submission, the preparer will receive an error message.
4. Sign-off:
  - a. A school must complete the information in one sitting.
  - b. Both the superintendent and preparer must sign off on the form.
5. Editing data:
  - a. You may edit the data, after submission, by clicking the edit link in the confirmation email you receive from IDOE. Completing a new JotForm will not overwrite the initial submission and will result in multiple submissions.
    - i. Using the edit link included in the email, the preparer may edit the JotForm, modify any field, and resubmit.
    - ii. Before submitting the updated report, both the superintendent and preparer must sign the revised claim form.
  - b. If you do not receive a confirmation email upon submission, you may have input the wrong email address.

## **Community Eligibility Program**

Any school corporation or charter school participating in the Federal Community Eligibility Program must make a separate and individual determination for each student to participate in the state’s curricular material reimbursement program.

A 2022-2023 application can be found in the curricular material reimbursement folder in the Public School Finance Community in [Moodle](#). If a school corporation or charter school chooses



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to develop its own application, officials must submit the application to the Office of School Finance for review and approval.

## **Reimbursement Requests**

For a school corporation or charter school to receive some level of reimbursement for some or all costs incurred during the school year in assisting eligible students, the JotForm must be filed between **Friday, September 30, and Monday, October 31**. (See I.C. 20-33-5-9(g)) The submission includes:

1. The costs incurred in providing:
  - a. Materials (including materials used in special education and high ability classes); and
  - b. Workbooks, digital content, and consumable materials (including other consumable teaching materials used in special education and high ability classes) used by students for not more than one school year.
2. The school governing body must have adopted the materials requested, except any materials used in special education classes and high ability classes.
3. Any other information required by the department.

## **Reimbursable Items**

1. Curricular material costs
2. Workbooks (including workbooks used in special education and gifted and talented classes)
3. Consumable Curricular Material (including consumable curricular material used in special education and gifted and talented classes)
4. Consumable Instructional Materials used in special education and gifted and talented classes.
5. Developmentally Appropriate Material for instruction in kindergarten through grade three laboratories, and children's literature programs.

## **Claim Form Descriptions**

Total costs must be submitted for students determined eligible for curricular material assistance on or before Friday, September 30, and reported in Data Exchange by Wednesday, October 5. The data must be certified no later than Wednesday, October 12. Schools must complete the JotForm between Friday, September 30, and Monday, October 31.

### **Grade Level**

1. The report reflects the costs of providing curricular materials for students in kindergarten through grade 12.
2. The JotForm excludes a total student count for each grade level reported. Only curricular material costs for students who have met the eligibility determination for approved free or reduced-price meals are eligible for curricular assistance. All eligible students, including eligible gifted and talented and special education students, must be classified by grade.



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3. For the State Board of Accounts audit, each school corporation and charter school must maintain complete and accurate information concerning the number of students determined to be eligible for assistance.
4. School officials may only claim curricular material costs for students who meet the financial eligibility standards found in I.C. 20-33-5.

## **Total Cost of Curricular Materials**

1. This column reflects the cost of providing curricular materials to eligible students at each grade level. The school governing body must approve curricular materials for open category curricular material and curricular materials used in gifted and talented and special education.
2. Prorate curricular materials shared by students and curricular materials used on a quarter or semester basis.
3. If the school governing body adopted curricular material for use by kindergarten students, the cost of such material, officials may include the cost in the reimbursement request.
4. Include the total cost of providing curricular materials for all eligible students at the appropriate grade level reported in Data Exchange on or before Friday, September 30.
5. Exclude supplies and fees from this column. These expenses are the responsibility of the local school corporation and not included as costs on the form.

## **Total Cost of Consumable Curricular Materials and Workbooks**

1. 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 school year. Examples include approved primary grade math books, handwriting books, and similar curricular materials.
2. Include consumable kit materials that are part of an adopted (or waived) curricular material.
3. Workbooks are consumable, copyrighted materials designed to supplement curricular materials and guide the work of a student by providing questions, exercises, etc. Workbooks used by students for no more than one school year.

## **Total Cost of Consumable Instructional Materials for Eligible Gifted and Talented Students**

1. Only reports costs for consumable instructional materials for gifted and talented students.

## **Total Cost of Consumable Instructional Materials for Eligible Special Education Students**

1. Only report costs for consumable instructional materials for special education students.



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2. School officials must maintain complete and accurate records regarding the cost of instructional materials.
3. 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.

## **Total Cost of Developmentally Appropriate Materials**

1. Developmentally appropriate material means material used instead of the purchase of a curricular material.
2. In an adopted category, the cost of developmentally appropriate material may be included for kindergarten through grade three, laboratories, and children's literature programs. In open categories, gifted and talented education programs, and special education programs, if curricular material is not purchased for a course, the developmentally appropriate material may be claimed for kindergarten through grade three, laboratories, and children's literature programs.
3. School officials must maintain complete and accurate records regarding the cost of developmentally appropriate materials.

## **Total Costs**

1. This will automatically total the amounts, by grade, reported for columns two through six.

Questions concerning curricular material reimbursement can be emailed to [doetextbooks@doe.in.gov](mailto:doetextbooks@doe.in.gov).