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**Newsletter No. 020-04/05, January 4, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Eckerd Youth Alternative Program (EYA) Invoices:** The School Allotments Section emailed Eckerd invoices for the 1st quarter on 12/20/04 to the applicable LEAs. If your LEA is listed on the "1stQ\_Eckerd LEA Summary.xls" file attached to this email with a payment due and you have not received the emailed invoice excel file, please contact Karen Peng (919) 807-3750 as soon as possible.

The 1st quarter Eckerd Invoice file will also be posted on the web site <http://www.ncpublicschools.org/fbs/>. Please download this file, complete the information, email the file back to Karen Peng ([kpeng@dpi.state.nc.us](mailto:kpeng@dpi.state.nc.us)) and mail the payment and a copy of the invoice to DPI, General Accounting Section, 6331 Mail Service Center, Raleigh, NC 27699-6331.

Please remember the payment needs to be received by DPI by 1/14/05, otherwise the At Risk allotment will be reduced.

**(2) REMINDERS:**

**IRS Mileage Rate Change:** Effective January 1, 2005, the Internal Revenue Service (IRS) has increased the business standard mileage rate from 37.5 cents per mile to 40.5 cents per mile. See attached memo.

**MSA Cash Management Training:** There are two more MSA and Cash Management training classes coming up in 2005. There is no registration fee for the class, but you must register to attend. On-line registration is available at the following site: <http://training.dpi.state.nc.us/>. The following LEA training dates are available: January 20, 2005 and March 21, 2005.

Class description: **"Surviving the School Business Jungle"** - DPI Systems Training: This class is geared toward those who work in an LEA School finance office - Finance Officers and finance staff. The class consists of "hands-on" training in the MSA/DBS General Ledger System and the Cash Management System. Instruction is targeted to the beginner or new user. If you have any

questions, please contact Richard Smith at [rismith@dpi.state.nc.us](mailto:rismith@dpi.state.nc.us) or Nancy Harris at [nharris@dpi.state.nc.us](mailto:nharris@dpi.state.nc.us).

**Disadvantaged Student Supplemental Funding Data:** Disadvantaged Student Supplemental Funding Data is available on the DPI website at [www.ncpublicschools.org/fbs/disstusuppfunddata04.html](http://www.ncpublicschools.org/fbs/disstusuppfunddata04.html).

Instructions to access the data used to create the funding formula is provided on the above website for your information. If you have questions you should contact Lydia Prude at 919.807.3718 / [lprude@dpi.state.nc.us](mailto:lprude@dpi.state.nc.us) or Engin Konanc at 919.807.3754 / [ekonanc@dpi.state.nc.us](mailto:ekonanc@dpi.state.nc.us).

**(3) FYI:** The State Board of Education will hold its Annual Planning Retreat beginning tonight from 5:45 - 9 p.m., at the Carolina Hotel, Pinehurst. The Retreat will continue on Tuesday beginning at 8 a.m. with a continental breakfast and will conclude at 4 p.m. The Wednesday, January 5, 2005 meeting will be held from 8:30 a.m. - 4:30 p.m., in Moore County Schools' Central Office Building, Highway 15-501 South, Carthage, NC. On Thursday, January 6, 2005, Board members will meet from 8:45 - 11 a.m., at Sandy Grove Elementary School, 8452 N. Old Wire Road, Lumber Bridge, NC. Agenda items include an Issues Session presentation by Moore County Schools' Superintendent Dr. Susan Purser and action on Disadvantaged Student Supplemental Funding Programs for 2004-05, renewal recommendations for charter schools established in 2001, and a response to House Bill 1354: Strengthen Domestic Violence Laws (short title). Discussion items include revisions to State Board policy on the Alternate Assessment Portfolio and calendar bill waivers requested by local school systems. On Thursday afternoon at 12:30 p.m., Board members will visit Hoke High School and view its Freshmen Academy. To view the full agenda, please go to [http://www.ncpublicschools.org/sbe\\_meetings/index.html](http://www.ncpublicschools.org/sbe_meetings/index.html) and click on the appropriate link.

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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**Newsletter No. 021-04/05, January 12, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**Reminders:**

**(1) Public School Building Bonds - Semi-Annual Cash Zero-Out January 28, 2005:**

DPI is required to periodically zero-out the Public School Building Bond funds (PRC 078). We will be using the Life-to-date (LTD) draws versus the LTD expenditures reported in our system for the NOVEMBER reporting period, to calculate the dollar amount to be taken back from your local bank account. We will do this cash zero-out for a funds requirement date of January 28, 2005 (i.e., the date funds will be withdrawn from your designated bank account).

We must receive any MANUAL expenditure adjustments that are needed to adjust the Cash Zero-Out in our office by Friday, January 21st, marked "Adjustment to Zero-Out". The effect of this zero-out process is to align your LTD cash and LTD expenditures by project. If you have any questions about your allotment or project balance, or the zero-out process, please contact Richard Smith at (919) 807-3729.

**(2) FY 2004-2005 Chart of Accounts Changes:** Please be aware that the \$1,800 Math, Science, & Special Ed Bonus (PRC 094) was not funded in the FY 2005 budget. Therefore, PRC 094 has been removed from the FY 2005 Chart of Accounts. Any expenditures coded to PRC 094 will have to be refunded from your Local funds. Also, Object 146 - Teacher Assistants when Substituting, is no longer valid for PRC 003. Any expenditures coded to Object 146 codes in PRC 003 will have to be refunded or recoded to the appropriate PRC.

**(3) Eckerd Youth Alternative Program (EYA) Invoices:** The School Allotments Section emailed Eckerd invoices for the 1st quarter on 12/20/04 to the applicable LEAs. If your LEA is listed on the "1stQ\_Eckerd LEA Summary.xls" file attached to this email with a payment due and you have not received the emailed invoice excel file, please contact Karen Peng (919) 807-3750 as soon as possible.

You should mail the payment and a copy of the invoice to DPI, General Accounting Section, 6331 Mail Service Center, Raleigh, NC 27699-6331 and email the completed file back to Karen Peng ([kpeng@dpi.state.nc.us](mailto:kpeng@dpi.state.nc.us))

**Please remember the payment needs to be received by DPI by 1/14/05, otherwise the At Risk allotment will be reduced.**

**(4) State Adopted Textbooks:** Please remember that State Adopted textbooks are exempt from the e-procurement process and that all State Adopted Textbooks must be purchased through the State Textbook Warehouse. We recommend that your purchases for all programs (including Reading First) come through your Textbook Coordinator so that duplicated orders are not made. If you have questions, please call Drew Fairchild at 919-715-5373 or Ben Matthews at 919-807-3501.

**FYI:**

**(5) E-Rate Update:** For an E-rate update of funding for NC Schools go to <http://www.ncwiseowl.org/it/erate/year7.htm>

**(6) State Board Meeting Highlights:** The State Board of Education held its annual planning meeting, as well as its regular meeting, this month. On the planning agenda, the Board considered several items, including the status of the South, Board operational issues, and involvement of partners in the policy-making process. At its regular monthly meeting, the Board approved on first reading waivers to the calendar law for LEAs that requested waivers under the inclement weather provision. Members also received other waiver requests for information this month and action in February. In addition, the Board approved Disadvantaged Student Supplemental Funding for Robeson County and approved the report from the Select Committee on Lateral Entry. The report from the Business Education Technology Alliance also was presented. Complete Highlights are posted online at <http://www.ncpublicschools.org/sbehighlights/>

**(7) Education Week Magazine Article: **QUALITY COUNTS 2005: FOCUS ON SCHOOL FINANCE:**** Quality Counts 2005, the ninth annual report card on public education in the 50 states, focuses on changing school finance systems and the growing push to link funding to student performance. Education Week's study of the 50 states and the District of Columbia finds that 31 states are considering major changes in how they pay for education or allot money to school districts. Sixteen states are embroiled in litigation challenging the school finance systems they now have in place. The report includes finance snapshots for each state. It also examines how states raise revenue for education, support their "at risk" students, and compensate their teachers. The report also highlights the shift in focus from questions of "equity" to "adequacy," as

states begin to explore what it would cost to meet the education goals spelled out in state constitutions. The report found that 30 states have had adequacy studies conducted, some of which are still underway. For this year's report, Education Week commissioned Bruce D. Baker, a finance expert at the University of Kansas, to categorize various adequacy methods and their findings across state studies. Education Week also conducted an in depth analysis of adequacy studies in three states: Kentucky, Maryland, and New York. As always, the report grades the states on the health of their education systems based on indicators related to student achievement; standards, assessments, and accountability; efforts to improve teacher quality; school climate; and resources. <http://www.edweek.org/qc05>

## **(8) PEP'S UPDATE OF PROGRAMS AND ITEMS OF INTEREST TO NC PUBLIC SCHOOL ADMINISTRATORS**

**One-Day seminars for all school administrators** - Data-Driven Decision Making AND School Finance \*\* The Principals' Executive Program presents powerful one-day seminars to help you increase your productivity and effectiveness. Hands-on Data-Driven Decision Making will be offered Wednesday, March 30, 2005. Fundamentals of School Finance will be offered Tuesday, March 29, 2005. Cost is \$100 per session. Class size is limited so please register early at <http://www.ncpep.org/topsem.html>

PEP'S SPRING SCHOOL LAW ACADEMY - Need a primer on school law issues? Sign up for all or part of /PEP's April 5-7, 2005, School Law Academy, a two-and one-half-day intensive and practical review of need-to-know school law issues. Principals and assistant principals registering for the entire Academy pay a reduced fee of \$250, will be accorded priority registration status (through February 28), and receive a free 2005 subscription to PEP's online, searchable legal treatise, /Education Law in North Carolina. / (Training in the use of /ELNC /will be available at the Academy.) Session subjects and daily registration fees are as follows:

- (1) Day 1 (\$125) - Employment Issues (e.g., Tenure Act, Free Speech, Employment Discrimination, Employment at-Will, Supervision, and Action Plans);
- (2) Day 2 (\$125) - Student Issues (e.g., First Amendment, Special Education, Discipline, Student Searches, Student Safety Measures);
- (3) Day 3 - morning only - \$75) - Operational/Other Issues (e.g., School-based purchasing and finance; Negligence, Legal Resources).

Registration is limited, so sign up early at <http://www.ncpep.org/tpls.html>  
For more information contact Sheila Brooks at [hiker@northcarolina.edu](mailto:hiker@northcarolina.edu) or 919-966-4483.

NEW PEP RESIDENTIAL PROGRAM LAUNCHES IN September - School Administrators as Instructional Leaders (SAIL), a new, four-day residential program beginning this year uses as its foundation the classroom walk-through model to gauge the level of instruction taking place in classrooms. Assistant principals as well as principals are eligible for this program, which will emphasize the use of reflective practice to improve teaching and learning. Participants will receive palm One handheld computers which are integral to the program and will become the property of the school districts whose administrators complete the program. Each program is limited to 26 participants. There is a nonrefundable \$250 registration fee for this program.

PEP 2005-06 RESIDENTIAL PROGRAM CALENDAR

Leadership Program for Assistant Principals

LPAP 42 (Fall 2005): August 17-19, September 21-23, October 26-28, and November 30-December 2

LPAP 43 (Spring 2006): January 11-13, February 15-17, March 22-24, and April 26-28.

Leadership Program for New Principals (LPNP)

LPNP 8 (Fall 2005-Spring 2006): September 14-16, October 19-21, November 16-18, December 7-9, 2005; February 8-10, March 15-17, 2006

School Administrators as Instructional Leaders (SAIL)

SAIL 1 September 27-28, 2005 and November 1-2, 2005

SAIL 2 September 29-30, 2005 and November 3-4, 2005

SAIL 3 January 24-25, 2006 and February 28-March 1, 2006

SAIL 4 January 26-27, 2006 and March 2-3, 2006

SAIL 5 March 28-29, 2006 and May 9-10, 2006

SAIL 6 March 30-31, 2006 and May 11-12, 2006

Plans for PEP's new Future Superintendents Leadership Program, scheduled for June, are not yet complete. Watch this space for further details.

FOR INFORMATION AND TO REGISTER FOR ALL CURRENT PEP PROGRAMS PLEASE VISIT <http://www.ncpep.org/programs.html>

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**Newsletter No. 022-04/05, January 21, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Calendar Bill - Modified Calendar:** As stated in HB1464, those calendars that have been determined by the local board of education as "modified" in the 2003-04 school year are not subject to the August 25th opening date or the June 10th closing date. Please ensure that your LEA has submitted a copy of the modified calendars in your LEA to DPI, where they will be kept on record. Calendars may be e-mailed to Alexis Schauss, [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us) or faxed to 919.807.3704. For more information on the Calendar Bill, please refer to <http://www.ncpublicschools.org/fbs/calendar04.html>.

**(2) New Absence Code 37:** DPI is creating a new absence code that the LEAs will use when a teacher assistant (TA) substitutes for a teacher. This will more accurately track absences and expenditures. The new absence code 37 will function exactly like the current Reason 07 but will allow DPI to more accurately track expenses and absences. LEAs may start using the new absence code 37 this year, although the change is effective July 1, 2005. See attached document for more information on the new absence code. For questions, please e-mail Ally Barfield at [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us).

**(3) Public School Building Bonds - Semi-Annual Cash Zero-Out January 28, 2005:** DPI is required to periodically zero-out the Public School Building Bond funds (PRC 078). We will be using the Life-to-date (LTD) draws versus the LTD expenditures reported in our system for the NOVEMBER reporting period, to calculate the dollar amount to be taken back from your local bank account. We will do this cash zero-out for a funds requirement date of January 28, 2005 (i.e., the date funds will be withdrawn from your designated bank account).

We must receive any MANUAL expenditure adjustments that are needed to adjust the Cash Zero-Out in our office THIS FRIDAY, January 21st, marked "Adjustment to Zero-Out". The effect of this zero-out process is to align your LTD cash and LTD expenditures by project. If you have any questions about the zero-out process, please contact Richard Smith at (919) 807-3729.



**(4) FY 2004-2005 Chart of Accounts Changes:** Please be aware that PRC 094 was not funded in the FY 2005 budget and has been removed from the FY 2005 Chart of Accounts. Any expenditures coded to PRC 094 will have to be refunded from your Local funds. Also, Object 146 - Teacher Assistants when Substituting, is no longer valid for PRC 003. Any expenditures coded to Object 146 codes in PRC 003 will have to be refunded or recoded to the appropriate PRC. The Uniform Chart of Accounts is available on DPI's website for you to access, search, or print. The website address is: <http://www.ncpublicschools.org/fbs/coa/index.html>.

**(5) State Public School Fund Allotment Overdraft Report:** The "State Public School Fund Allotment Overdraft Report" for prior year, FY2003-04 (Company 8000), was sent by netview on Tuesday, January 18th. Any refunds posted through the December processing period are reflected on this report. This report now has penalties assessed for all overspent allotments. Refunds for all allotments exceeded, plus any penalties due, should be submitted by February 7, 2005, to avoid additional penalties. PLEASE SUBMIT THE REFUNDS FOR THE 7TH PROCESSING PERIOD. Contact Nancy Harris, [nharris@dpi.state.nc.us](mailto:nharris@dpi.state.nc.us), with any questions concerning Dollar Allotments. Contact Sherry Peele, [speelee@dpi.state.nc.us](mailto:speelee@dpi.state.nc.us), or Marie Houston, [mhouston@dpi.state.nc.us](mailto:mhouston@dpi.state.nc.us), with any questions concerning Position over usage or State overpayments.

**(6) BUD System Processing:** Please make note that the FINAL day to submit BUD batches to post during the month of January is Wednesday, January 26th. All batches must be submitted by 4:00 p.m. Wednesday afternoon. We will process these batches and send communication forms on Thursday morning. Any batches submitted after 4:00 on 1/26/05 will be received and processed on February 1, 2005, and any expenditure of funds in the BUD transactions will be posted in FEBRUARY instead of JANUARY. If you have any questions, please contact Richard Smith at [rismith@dpi.state.nc.us](mailto:rismith@dpi.state.nc.us) or Nancy Harris at [nharris@dpi.state.nc.us](mailto:nharris@dpi.state.nc.us).

**(7) Sales Tax Refunds:** Attached to this e-mail are instructions for processing Sales Tax Refunds for each fund. Please pay close attention to Federal PRCs that have closed and those for which you have no current year allotment. Contact Nancy Harris at [nharris@dpi.state.nc.us](mailto:nharris@dpi.state.nc.us) with any questions concerning these instructions.

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 023-04/05, February 10, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Unspent Driver Training Funds at June 30, 2005:** Please **analyze your Driver Training funds** and report the amount you anticipate reverting to the State at June 30, 2005 on the attached Excel form. This form must be signed by the Finance Officer and Superintendent and faxed by March 1, 2005 to the School Allotments Section at 919.807.3740. If you have questions contact Monique M. Johnson at (919) 807-3684 or [mjohnson@dpi.state.nc.us](mailto:mjohnson@dpi.state.nc.us).

**(2) Eckerd Youth Alternatives Update (EYA):** We want to thank all the Finance Officers that coordinated the first quarter billing processing for the EYA program. We felt this went very smoothly for the first go round of this new process. Though we have not received the second quarter billing as of today, we do expect it in the near future. If you could please pass along a thanks from our staff here to all those that were involved in making this a success.

**(3) Planning Allotments:** We do plan to handout one copy of the Planning Allotments at the NCASBO Conference next week. The package will be addressed to the Superintendent. Please make plans for one person from your LEA to pick up the envelope. The Planning Allotments will also be net viewed for your downloading convenience. We do not know the time or location for distribution, but it will be announced at the conference next week.

**(4) FY 2004-2005 Chart of Accounts Update:** An update to the Uniform Chart of Accounts was downloaded on Thursday, February 3, 2005, to your AS400 for you to receive in BUD (Run SURS). A spreadsheet showing the changes to the Chart since its publication is attached. Please note that these changes include two new Local PRCs: 331 = Emergent Literacy Grant and 335 = Fruit & Vegetable Program. If you have any questions pertaining to the chart or concerning proper use of these funds, please contact the School Business Division at (919) 807-3700. If you have questions concerning receiving your Chart of Accounts in BUD, please contact the DPI Helpdesk at (919) 807-4357.

The Uniform Chart of Accounts and Summary of Updates are also available on DPI's website. You may access, search, print or the Chart of Accounts from the website; or purchase a copy through Publications. If others on your staff need the chart for a

specific program, they can print those specific pages. The website address is:  
<http://www.ncpublicschools.org/fbs/coa/index.html>.

**(5) State Board Meeting Highlights:** Last week, members of the State Board of Education approved waivers to the calendar law, approved the report and recommendations from its Task Force on Teacher Retention and received the 2003-04 dropout data report. Complete highlights of the Board's activities are posted online at <http://www.ncpublicschools.org/sbehighlights/>.

**(6) Requests for School Numbers, Address Changes and School Closings:** As a result of reorganization, contact persons for requests for School Numbers, Address Changes and School Closings, etc. which were being directed to M. Engin Konanc, should now be directed to Brittany Balding at 919-807-3734 or [bbalding@dpi.state.nc.us](mailto:bbalding@dpi.state.nc.us) or Alexis Schauss at 919-807-3708 in the Information Analysis & Reporting Area of School Business.

**(7) Legislation Introduced to Provide Permanent Solution to E-rate Accounting Issue:** Key senators representing both parties have introduced legislation to provide a permanent solution to the accounting issue that held up the approval of E-rate funding commitments for nearly five months late last year. For more information, visit the Funds for Learning Web site at <http://www.fundsforlearning.com/cgi-bin/NewsList.cgi?cat=News&rec=607&cat=E-rate>.

**FYI:**

**NEW IN PUBLICATIONS:**

**NC Public School Laws** (CD-Rom Edition with Search Engine) (UPDATED WITH 2004 SESSION) Contains statutes, case notes and opinions of the Attorney General through the 2004 session. Includes statutes other than 115C. (LexisNexis edition) SL109, 2005, \$18.00

**Public Schools of North Carolina Employee Salary and Benefits Manual, 2004-05** (UPDATED) The updated Salary and Benefits Manual outlines the policies and procedures related to public school personnel guidelines. Relevant North Carolina General Statutes, State Board of Education Administrative Polices, and federal laws also are referenced. AC112, 2005, \$8.00

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## PEP'S UPDATE OF PROGRAMS AND ITEMS OF INTEREST TO NC PUBLIC SCHOOL ADMINISTRATORS:

### TEACHER RETENTION SEMINAR SCHEDULED FOR MARCH:

At PEP's one-day (March 31) topical seminar, "Strategies for Teacher Retention," school officials will learn research-proven, low-cost means to keep high quality teachers. Although individuals are welcome to attend, two- or three-member teams from individual schools - comprised, for example, of one or two administrators plus a mentor - will derive maximum benefit from the training. Cost: \$200 for a three-member team; \$150 for a two-member team; \$100 for an individual. Click here for more information and/or to register, <http://www.ncpep.org/topsem.html>.

### SPRING SCHOOL LAW ACADEMY:

Sign up today for all or part of PEP's April 5-7, 2005, School Law Academy, a two-and one-half-day intensive and practical review of need-to-know school law issues. Participants registering for the entire academy pay a reduced fee of \$250 and receive a free, 2005 subscription to PEP's online, legal treatise, Education Law in North Carolina (ELNC). (ELNC training will be available at the Academy.) Session subjects and daily registration fees are as follows:

- Day 1 (\$125) - Employment Issues (e.g., Tenure Act, Wage and Hour, Employment Discrimination, Employment at-Will, Supervision and Action Plans).
- Day 2 (\$125) - Student Issues (e.g., First Amendment, Special Education, Discipline, Student Searches, Dealing with Child Abuse).
- Day 3 (morning only, \$75) - Operational/Other Issues (e.g., School-based Budgeting; Negligence, Equal Access Act, Legislative Update).

Registration is limited, so sign up soon at <http://www.ncpep.org/tpls.html>.

Current N.C. public school principals and assistant principals receive priority consideration through February 28. For more information contact Sheila Brooks at [hiker@northcarolina.edu](mailto:hiker@northcarolina.edu) or 919-966-4483.

### PAIDEIA INSTITUTE OFFERS SEMINAR ON IMPROVING SCHOOL CULTURE:

Learn how to conduct faculty seminars to communicate a shared vision for change while simultaneously improving adult relationships in your school at this powerful, two-day (April 7-8, 2005) seminar in Chapel Hill. For more information and to register, visit <http://www.paideia.org>.

### REGISTRATION REOPENED FOR PEP'S SPRING SEMINARS:

Due to overwhelming demand, additional sessions of PEP's popular Data-Driven Decision Making and School Finance seminars have been scheduled. Cost is \$100 per person per one-day session.

Dates: Hands-on Data-Driven Decision Making: Tuesday, April 12 2005;

Fundamentals of School Finance: April 13, 2005. Class size is limited, so please register as soon as possible at <http://www.ncpep.org/topsem.html>.

LEADERSHIP PROGRAM FOR FUTURE SUPERINTENDENTS (LPFS)

In June PEP will inaugurate its first program designed to prepare principals and central office executives for the top jobs in North Carolina's LEAs. Blended with PEP's popular Leadership Program in the Humanities, LPFS will emphasize the unique personal and professional skills needed to succeed as a superintendent. Watch the March listserv for more information.

LEADERSHIP FOR NEW PRINCIPALS 8

A few openings remain - more at the middle and high school levels than at the elementary level - for the next edition of PEP's popular LPNP program, which launches in September. To learn more, visit <http://www.ncpep.org/programs.html>.

SCHOOL ADMINISTRATORS AS INSTRUCTIONAL LEADERS (SAIL) PROGRAMS FILLING UP QUICKLY:

Spaces remain for participants in only four of PEP's six scheduled SAIL programs, which focus on the use of classroom walk-throughs to improve teaching and learning in schools. Assistant principals as well as principals are eligible for SAIL. Participants will receive palmOne handheld computers, which are integral to the program and will become the property of the schools whose administrators complete SAIL successfully. Class size is limited to 26. Visit this link to register; <http://www.ncpep.org/programs.html>. There is a nonrefundable \$250 registration fee for this program. The first three programs have filled.

SAIL programs still accepting applications:

- SAIL 4, January 26-27, 2006 and March 2-3, 2006
- SAIL 5, March 28-29, 2006 and May 9-10, 2006
- SAIL 6, March 30-31, 2006 and May 11-12, 2006.

PEP OFFERS NEW RESIDENTIAL PROGRAM FOR EXPERIENCED PRINCIPALS:

PEP's inaugural Leadership Program for Experienced Principals (LPXP) will commence in early 2006. This four session program will focus on the critical needs of experienced principals. For more information, visit <http://www.ncpep.org/programs.html>.

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**Newsletter No. 024-04/05, February 23, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) State Public School Fund Allotment Overdraft Reports:** We netviewed the "State Public School Fund Allotment Overdraft Report" for the prior year, FY 2003-04, as of the January 2005 processing period, on Monday, February 14th and the current year report, FY 2004-05, as of the January 2005 processing period, on Tuesday, February 15th. All refunds posted through the January processing period are reflected. Refunds for all allotments exceeded, plus any penalties due, should be submitted by March 7, 2005, to avoid additional penalties. Please submit the refunds through the BUD System for Processing Period 08. On the current year report, for any PRC with a zero allotment, refer to the Allotment Policy Manual on-line at [www.ncpublicschools.org/fbs/allot/toc.html](http://www.ncpublicschools.org/fbs/allot/toc.html) for instructions. Please note that the following PRCs require you to convert positions to dollars, with an ABC Transfer request, before you can record expenditures: PRC 004, 008, 010, & 020. Also, PRC 094 is not funded for the current year. Any expenditures from PRC 094 will have to be refunded. Contact Lydia Prude, [lprude@dpi.state.nc.us](mailto:lprude@dpi.state.nc.us) with any questions concerning your allotments.

**(2) Allotment Overdraft Penalties:** Thank you for timely payment of the penalties due on your Prior Year Allotment overdrafts. When paying penalties, please use the Penalty Payment option in the BUD System and remember to mark the "Prior Year" field with a "Y" if the penalty due is from the "Allotment Overdraft Report for Company 8000" report. ONLY PENALTIES ARE PAID THROUGH THE "PENALTY PAYMENT" OPTION. ALL OTHER REFUNDS SHOULD BE SUBMITTED THROUGH THE "CURRENT YEAR" OR "PRIOR YEAR" REFUND OPTIONS. Contact Nancy Harris at [nharris@dpi.state.nc.us](mailto:nharris@dpi.state.nc.us) with questions concerning any penalties due.

**(3) Planning Allotments:** Planning allotments for FY 2005-06 have been net viewed and the reports can be printed from the AS 400. Other supporting documents will be posted on our website. Please contact Mike Thompson in School Allotments at (919) 807-3732 if you have questions concerning your reports.

(4) **Central Office FTE per ADM Report:** Attached is the annual report of the central office personnel per Average Daily Membership for 2004-05.

(5) **Orientation Session for Employment Security Commission**

**Unemployment Claims:** An orientation session for the ESC unemployment claims administrators and/or finance officers will be held for individuals involved in the completion of ongoing unemployment claims and end of year claims. Dates and locations of sessions are attached as well an Agenda for the meetings. If you are planning to attend you should contact Tarsha Silver at [lsilver@dpi.state.nc.us](mailto:lsilver@dpi.state.nc.us) to register for a session.

**FYI:**

**Highlights of the North Carolina Public School Budget, February 2005** is online at [www.ncpublicschools.org/fbs](http://www.ncpublicschools.org/fbs) under "What's New".

**Bill Status Report:** A Bill Status Report of all education-related bills that have been filed in the General Assembly is attached.

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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# PUBLIC SCHOOLS OF NORTH CAROLINA

STATE BOARD OF EDUCATION :: Howard N. Lee, *Chairman*

WWW.NCPUBLICSCHOOLS.ORG

DEPARTMENT OF PUBLIC INSTRUCTION :: Patricia N. Willoughby, *State Superintendent*

## Bill Status Report – Education & Education Related Bills 2005 General Assembly

### House Bills

| Bill # | Short Title                                           | Primary Sponsor(s)                        | Date Filed | Current Status                                                             |
|--------|-------------------------------------------------------|-------------------------------------------|------------|----------------------------------------------------------------------------|
| HB 3   | Local Option Education Lottery                        | Owens                                     | 1/26/05    | 1/27/05<br>Ref to Rules                                                    |
| HB 11  | Clarify School Administrators Certification Standards | LaRoque                                   | 1/27/05    | 1/31/05<br>Ref to Education                                                |
| HB 16  | School Curriculum Shall Include Consumer Education    | Miller                                    | 1/27/05    | 1/31/05<br>Ref to Education                                                |
| HB 28  | Study of School Transportation Funding                | Glazier,<br>Dickson                       | 2/1/02     | 2/2/05<br>Ref to Education                                                 |
| HB 42  | TEACCH Program Funds                                  | Nye                                       | 2/2/05     | 2/3/05<br>Ref to Appropriations                                            |
| HB 50  | Street Gang Prevention Act                            | Michaux, Frye                             | 2/2/05     | 2/3/05<br>Ref To Com On Judiciary II                                       |
| HB 59  | Retired School Professionals Return to Work           | McLawhorn,<br>Bordsen,<br>Warren          | 2/2/05     | 2/3/05<br>Ref to Pensions & Retirement                                     |
| HB 84  | Long-Term Care Insurance Tax Credit (=HB 148)         | Nye, England,<br>Barnhart, Earle          | 2/3/05     | 2/7/05<br>Ref to Finance                                                   |
| HB 129 | State and Local Retirement COLAs                      | Wright                                    | 2/8/05     | 2/9/05<br>Ref to Pensions & Retirement                                     |
| HB 147 | Elections Contests (=SB 82)                           | Ross, Earle                               | 2/8/05     | 2/9/05<br>Ref To Com On Rules,<br>Calendar, and Operations of the<br>House |
| HB 148 | Long-Term Care Insurance Tax Credit (=HB 84)          | Howard,<br>Sherrill                       | 2/8/05     | 2/9/05<br>Ref to Finance                                                   |
| HB 150 | Limit General Fund Spending/Prior Year's Spending     | Gulley                                    | 2/8/05     | 2/9/05<br>Ref to Appropriations                                            |
| HB 151 | Zero-Based Budgeting                                  | Gulley                                    | 2/8/05     | 02/09/2005<br>Ref Appropriations                                           |
| HB 158 | Recasting Lost Votes                                  | Preston, Insko                            | 2/9/05     | 2/10/05<br>Ref To Com On Election Law<br>and Campaign Finance Reform       |
| HB 181 | Increase Salary for Beginning Teachers                | Johnson,<br>Carney,<br>Preston,<br>Yongue | 2/9/05     | 2/10/05<br>Ref to Appropriations                                           |
| HB 182 | Charter School Retirement Election                    | Ray, Clary                                | 2/9/05     | 2/10/05<br>Ref to Pensions and Retirement                                  |
| HB 221 | Expand Teaching Fellows Program                       | Yongue<br>Carney<br>Johnson<br>Preston    | 2/14/05    | 2/15/05<br>Ref to Appropriations                                           |
| HB 222 | Coordination of Children's Services/Study             | Insko<br>Barnhart                         | 2/14/05    | 2/15/05<br>Ref to Children, Youth, and<br>Families, if favorable, to Rules |



|        |                                             |                                        |         |                                                                                                                            |
|--------|---------------------------------------------|----------------------------------------|---------|----------------------------------------------------------------------------------------------------------------------------|
| HB 223 | 2005 Education Lottery Referendum           | B. Allen Hunter                        | 2/14/05 | 2/15/05<br>Ref to Rules                                                                                                    |
| HB 224 | Low-Wealth School Supplemental Funding      | Yongue<br>Preston<br>Glazier<br>Sauls  | 2/14/05 | 2/15/05<br>Ref to Appropriations                                                                                           |
| HB 246 | Additional Funds/Disabled & Gifted Children | Preston<br>Johnson<br>Carney<br>Yongue | 2/15/05 | 2/16/05<br>Ref to Appropriations                                                                                           |
| HB 247 | Retired Teachers Work/No Penalty            | Preston<br>Carney<br>Johnson<br>Yongue | 2/15/05 | 2/16/05<br>Ref to Pensions and Retirement,<br>if favorable, to Education                                                   |
| HB 289 | State Health Plan: No Abortion Covg. Except | LaRoque                                | 2/16/05 | 2/17/05<br>Ref to the Com on Health and, if<br>favorable, to the Com on Rules,<br>Calendar, and Operations of the<br>House |

### Senate Bills

| Bill # | Short Title                                        | Primary Sponsor | Date Filed | Current Status                                                              |
|--------|----------------------------------------------------|-----------------|------------|-----------------------------------------------------------------------------|
| SB 34  | Council of State Implementing Statute              | Albertson       | 2/1/05     | 2/2/05<br>Ref to Ways & Means                                               |
| SB 35  | Modify Red Light Camera Authorization              | Hoyle           | 2/1/05     | 2/2/05<br>Ref to Judiciary I                                                |
| SB 56  | Appoint Most Council Of State Members              | Albertson       | 2/2/05     | 2/3/05<br>Ref to Ways & Means                                               |
| SB 71  | State of the State Address/Inviting Governor       | Rand            | 2/7/05     | 2/17/05<br>Ratified Ch. Res. 2005-6                                         |
| SB 82  | Election Contests (=HB 147)                        | Clodfelter      | 2/8/05     | 2/17/05<br>[H] Ref To Com On Election<br>Law and Campaign Finance<br>Reform |
| SB 103 | Lapsed Salaries Revert                             | Brock           | 2/9/05     | 2/10/05<br>Ref to Appropriations/Base<br>Budget                             |
| SB 106 | No Abortion Coverage/State Health Plan             | Brock           | 2/9/05     | 2/10/05<br>Ref to Appropriations/Base<br>Budget                             |
| SB 113 | Low-Wealth School Supplemental Funding             | Rand            | 2/10/05    | 2/14/05<br>Ref to Appropriations/Base<br>Budget                             |
| SB 122 | Long-Term Care Insurance Tax Credit                | Purcell         | 2/10/05    | 2/14/05<br>Ref to Finance                                                   |
| SB 133 | Reconfirming Provisional Voting                    | Clodfelter      | 2/14/05    | 2/17/05<br>Com Substitute Adopted                                           |
| SB 171 | Impact of Student Mobility on Academic Performance | Dalton          | 2/17/05    |                                                                             |

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**Newsletter No. 025-04/05, March 3, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Reemployed Retirees Exempt from the Cap Substituting:** The Retirement System stated in a memo to the Finance Officers and Personnel Administrators, dated August 27, 2004 that earning of a retiree exempt from the cap, who is reemployed as a substitute, would be subject to the 11.7%.

We have been informed that this statement has been retracted and this is no longer a requirement. Effective immediately, LEAs are not required to contribute 11.7% of substitute pay to the Retirement System. If you have made payments for substitute teachers, we do not expect refunds to be distributed. The effective date of this retraction is effective from this point forward.

**(2) 11.7% Matching Retirement Rate:** This higher matching retirement amount, coded to Object 228, is only due on what is referred to as "covered salaries". At the website below, you may access the letter that was sent from the Retirement System concerning the new matching rate. In this letter there are several payment items that are NOT included in "covered salaries" and therefore should NOT be matched at the higher rate. Longevity is one of the excluded pay items.

<http://www.ncpublicschools.org/fbs/retireexemptcap04.html>

DPI has posted any expenditures coded to 5910-009-228 to 5910-009-225 on our system. Please correct your GL and know that you should not pay the higher matching rate on excluded payment types.

**(3) MSA/Cash Management Training:** There is one remaining MSA/Cash Management training date available on March 24th. Seats are still available. Please forward this information to any staff members that would benefit from this training. There is no registration fee for the class, but you must register to attend. On-line registration is available at the following site:

<http://hrms.training.dpi.state.nc.us/default.asp>.

Class description:

This class is geared toward those who work in an LEA finance office - Finance Officers and finance staff. The class consists of "hands-on" training in the MSA/DBS General Ledger System. Instruction is targeted to the beginner or new user. For questions about the LEA training, contact Richard Smith at [rismith@dpi.state.nc.us](mailto:rismith@dpi.state.nc.us) or Nancy Harris at [nharris@dpi.state.nc.us](mailto:nharris@dpi.state.nc.us).

**(4) February Refunds:** Please note that any refunds or adjustments to be posted effective in the February processing period MUST be submitted in the BUD system by Monday, March 7th, for Processing Period 08. Processing Period 09 may default on your system. You must change the period to 08 before sending your batch. Please contact Nancy Harris at [nharris@dpi.state.nc.us](mailto:nharris@dpi.state.nc.us) if you have any questions.

**(5) Financial Management Report Card:** Each LEA will receive a report card of their financial management performance for the 2003-04 fiscal year. This report provides details of the performance in each of the areas assessed for the State Board Awards.

The Criteria used to determine the State Board Awards for Excellence in Financial Management are posted on the FBS website under "What's New".

<http://www.ncpublicschools.org/fbs/>

**(6) Additional Transportation Funding for Fuel:** We are keenly aware of the high cost of fuel this year. In the December 1 allotment to bus garages, line (12) included additional funding to allow for an increase in fuel from \$1.00 per gallon to \$1.20 per gallon. The 2004-2005 transportation budget was initially built using a statewide average cost per gallon of \$1. At the time allotments were done, it became apparent that fuel costs would exceed that amount significantly and would average - even if prices started coming down - at LEAST \$1.20 per gallon. It appears now that the average cost per gallon for the year will be closer to \$1.40. To date the statewide average for the school year is about \$1.38.

We will not do an additional allotment until sometime next month when the cost can be better projected.

For planning purposes, if the average rises to \$1.40 per gallon (which is a good guess at this point) then the adjustment to go from \$1.20 to \$1.40 would be the same amount as listed in line (12) of the allotment data sheet to increase from \$1.00 to \$1.20.

Questions should be directed to Derek Graham, Section Chief, Transportation Services.

[dgraham@dpi.state.nc.us](mailto:dgraham@dpi.state.nc.us)

**FYI:**

Bill Status Report: An updated Bill Status Report of all education-related bills that have been filed in the General Assembly is attached.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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## Bill Status Report – Education & Education Related Bills 2005 General Assembly

### House Bills

| Bill # | Short Title                                           | Primary Sponsor(s)               | Date Filed | Current Status                                              |
|--------|-------------------------------------------------------|----------------------------------|------------|-------------------------------------------------------------|
| HB 3   | Local Option Education Lottery                        | Owens                            | 1/26/05    | 1/27/05<br>Ref to Rules                                     |
| HB 11  | Clarify School Administrators Certification Standards | LaRoque                          | 1/27/05    | 1/31/05<br>Ref to Education                                 |
| HB 15  | Cigarette Tax Increase for Public Health              | Miller                           | 1/27/05    | 1/31/05<br>Ref to Finance                                   |
| HB 16  | School Curriculum Shall Include Consumer Education    | Miller                           | 1/27/05    | 1/31/05<br>Ref to Education                                 |
| HB 28  | Study of School Transportation Funding                | Glazier<br>Dickson               | 2/1/02     | 2/2/05<br>Ref to Education                                  |
| HB 42  | TEACCH Program Funds                                  | Nye                              | 2/2/05     | 2/3/05<br>Ref to Appropriations                             |
| HB 50  | Street Gang Prevention Act                            | Michaux<br>Frye                  | 2/2/05     | 2/3/05<br>Ref to Judiciary II                               |
| HB 59  | Retired School Professionals Return to Work           | McLawhorn,<br>Bordsen,<br>Warren | 2/2/05     | 2/3/05<br>Ref to Pensions & Retirement                      |
| HB 84  | Long-Term Care Insurance Tax Credit (=HB 148)         | Nye, England,<br>Barnhart, Earle | 2/3/05     | 2/7/05<br>Ref to Finance                                    |
| HB 87  | State Employees/Pay Periods                           | Miller                           | 2/03/05    | 2/7/05<br>Ref to State Personnel                            |
| HB 106 | Expand Medicaid Eligibility to Children/200%          | Nye, England,<br>Earle           | 2/7/05     | 2/8/05<br>Ref to Health, if favorable, to<br>Appropriations |
| HB 129 | State and Local Retirement COLAs                      | Wright                           | 2/8/05     | 2/9/05<br>Ref to Pensions & Retirement                      |
| HB 148 | Long-Term Care Insurance Tax Credit (=HB 84)          | Howard,<br>Sherrill              | 2/8/05     | 2/9/05<br>Ref to Finance                                    |
| HB 150 | Limit General Fund Spending/Prior Year's Spending     | Gulley                           | 2/8/05     | 2/9/05<br>Ref to Appropriations                             |
| HB 151 | Zero-Based Budgeting                                  | Gulley                           | 2/8/05     | 02/09/2005<br>Ref Appropriations                            |

|        |                                             |                                        |         |                                                                            |
|--------|---------------------------------------------|----------------------------------------|---------|----------------------------------------------------------------------------|
| HB 181 | Increase Salary for Beginning Teachers      | Johnson<br>Carney<br>Preston<br>Yongue | 2/9/05  | 2/10/05<br>Ref to Appropriations                                           |
| HB 182 | Charter School Retirement Election          | Ray<br>Clary                           | 2/9/05  | 2/10/05<br>Ref to Pensions and Retirement                                  |
| HB 221 | Expand Teaching Fellows Program             | Yongue<br>Carney<br>Johnson<br>Preston | 2/14/05 | 2/15/05<br>Ref to Appropriations                                           |
| HB 222 | Coordination of Children's Services/Study   | Insko<br>Barnhart                      | 2/14/05 | 2/15/05<br>Ref to Children, Youth, and<br>Families, if favorable, to Rules |
| HB 223 | 2005 Education Lottery Referendum           | B. Allen<br>Hunter                     | 2/14/05 | 2/15/05<br>Ref to Rules                                                    |
| HB 224 | Low-Wealth School Supplemental Funding      | Yongue<br>Preston<br>Glazier<br>Sauls  | 2/14/05 | 2/15/05<br>Ref to Appropriations                                           |
| HB 246 | Additional Funds/Disabled & Gifted Children | Preston<br>Johnson<br>Carney<br>Yongue | 2/15/05 | 2/16/05<br>Ref to Appropriations                                           |
| HB 247 | Retired Teachers Work/No Penalty            | Preston<br>Carney<br>Johnson<br>Yongue | 2/15/05 | 2/16/05<br>Ref to Pensions and Retirement,<br>if favorable, to Education   |
| HB 286 | Increase Cigarette Tax                      | Weiss<br>Justice<br>Womble<br>Glazier  | 2/16/05 | 2/17/05<br>Ref to Finance                                                  |
| HB 289 | State Health Plan: No Abortion Covg. Except | LaRoque                                | 2/16/05 | 2/17/05<br>Ref to Health, if favorable, to<br>Rules                        |
| HR 318 | Permanent House Rules                       | Culpepper                              | 2/17/05 | 2/24/05<br>House Adopted                                                   |
| HB 323 | State Health Plan/Increase Wellness Benefit | Jeffus                                 | 2/17/05 | 2/21/05<br>Ref to Health                                                   |
| HB 327 | 2005 Technical Corrections Act              | Culpepper                              | 2/21/05 | 2/22/05                                                                    |

|        |                                              |                                           |         |                                  |
|--------|----------------------------------------------|-------------------------------------------|---------|----------------------------------|
|        |                                              |                                           |         | Ref to Rules                     |
| HB 366 | Funds for MH/DD/SA Children's Services       | Insko                                     | 2/23/05 | 2/24/05<br>Ref to Appropriations |
| HB 387 | Social Security # Can't Be Student ID #      | Barnhart                                  | 2/24/05 | Filed                            |
| HB 388 | Impact of Student Mobility on Academic Perf. | Folwell                                   | 2/24/05 | Filed                            |
| HB 389 | Additional Flexibility on Teacher Pay Date   | Lucas<br>Glazier<br>McAllister<br>Dickson | 2/24/05 | Filed                            |

### Senate Bills

| Bill # | Short Title                                  | Primary Sponsor | Date Filed | Current Status                               |
|--------|----------------------------------------------|-----------------|------------|----------------------------------------------|
| SB 34  | Council of State Implementing Statute        | Albertson       | 2/1/05     | 2/2/05<br>Ref to Ways & Means                |
| SB 35  | Modify Red Light Camera Authorization        | Hoyle           | 2/1/05     | 2/2/05<br>Ref to Judiciary I                 |
| SB 56  | Appoint Most Council Of State Members        | Albertson       | 2/2/05     | 2/3/05<br>Ref to Ways & Means                |
| SB 71  | State of the State Address/Inviting Governor | Rand            | 2/7/05     | 2/17/05<br>Ratified Ch. Res. 2005-6          |
| SB 82  | Election Contests                            | Clodfelter      | 2/8/05     | Filed                                        |
| SB 103 | Lapsed Salaries Revert                       | Brock           | 2/9/05     | 2/10/05<br>Ref to Appropriations/Base Budget |
| SB 106 | No Abortion Coverage/State Health Plan       | Brock           | 2/9/05     | 2/10/05<br>Ref to Appropriations/Base Budget |
| SB 113 | Low-Wealth School Supplemental Funding       | Rand            | 2/10/05    | 2/14/05<br>Ref to Appropriations/Base Budget |
| SB 122 | Long-Term Care Insurance Tax Credit          | Purcell         | 2/10/05    | 2/14/05<br>Ref to Finance                    |
| SB 133 | Reconfirming Provisional Voting              | Clodfelter      | 2/14/05    | 2/17/05<br>Com Substitute Adopted            |
| SB 139 | Session Limits                               | Hoyle           | 2/15/05    | 2/16/05<br>Ref to Ways and Means             |
| SB 162 | Session Limits                               | Phil Berger     | 2/15/05    | 2/16/05<br>Ref to Ways and Means             |

|        |                                                    |          |         |                                                                                           |
|--------|----------------------------------------------------|----------|---------|-------------------------------------------------------------------------------------------|
| SB 171 | Impact of Student Mobility on Academic Performance | Dalton   | 2/17/05 | 2/21/05<br>Ref to Education/Higher Education                                              |
| SB 181 | Reciprocity for Teachers from Other States         | Tillman  | 2/22/05 | 2/23/05<br>Ref to Education/Higher Education                                              |
| SB 183 | Funds for the Schools Attuned Program              | Rand     | 2/22/05 | 2/23/05<br>Ref to Appropriations/Base Budget                                              |
| SB 212 | Counties May Provide Funds to Charter Schools      | Goodall  | 2/23/05 | 2/24/05<br>Ref to Education/Higher Education, if favorable, to Appropriations/Base Budget |
| SB 213 | Remove Cap on Number of Charter Schools            | Goodall  | 2/23/05 | 2/24/05<br>Ref to Education/Higher Education, if favorable, to Appropriations/Base Budget |
| SB 216 | Coordination of Children's Services/Study          | Nesbitt  | 2/23/05 | 2/24/05<br>Ref to Health Care, if favorable, to Appropriations/Base Budget                |
| SB 242 | 2005 Technical Corrections Act                     | Hartsell | 2/24/05 | Filed                                                                                     |



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**Newsletter No. 026-04/05, March 23, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) State-Adopted Textbooks:** Please be aware that all state-adopted textbooks should be ordered through the state textbook warehouse. This includes all modified textbooks as well. State adopted textbooks are exempt from eprocurement rules and should not be ordered through eprocurement. If you have questions, please call Drew Fairchild at 919-715-5373 or Ben Matthews at 919-807-3501.

**(2) FY 2004-2005 Chart of Accounts Update:** An update to the Uniform Chart of Accounts was downloaded on Friday, March 4, 2005 to your AS400 for you to receive in BUD (Run SURF). Please note that the following new codes have been added: (State) 1-5930-054-146 Teacher Assistant when Substituting; (Federal) 3-5920-050-372 Employee Tuition Reimbursement; and (Child Nutrition) 5-6560-035-529 Misc Contracts - Renovations. If you have any questions pertaining to the chart or concerning proper use of these funds, please contact the School Business Division at (919) 807-3700. If you have questions concerning receiving your Chart of Accounts in BUD, please contact the DPI Helpdesk at (919) 807-4357.

The Uniform Chart of Accounts and Summary of Updates are also available on DPI's website. You may access, search, or print the Chart of Accounts from the website; or purchase a copy through Publications. If others on your staff need the chart for a specific program, they can print those specific pages. The website address is: <http://www.ncpublicschools.org/fbs/coa/index.html>.

**(3) Year-End and Invalid Account Codes:** It is not too early to start thinking about year-end close-out time. Time to clean-up any errors on the MFR data. There are still many LEAs who are reporting invalid account codes in their monthly financial data. Your financial software edits the expenditure accounts at the point of data entry. You set your system parameters to give either a "Warning" or an "Error" when an invalid code is used. Please notify your staff that the "Warning" should not be ignored. Using invalid codes causes you problems with your datafile posting and with your MFR reporting. You should download updated files from the BUD System weekly to ensure that you have the most current information.

DPI sends each month, via netview, an "MFR Error Messages" report (PGA10RP4-E) listing any errors detected in your MFR data; and a Monitoring Letter listing any expenditures submitted through datafile to invalid codes, with the valid codes where DPI posted the expenditures. If you disagree with the code used by DPI to post the datafile expenditure, then you must submit a UTR in the BUD system, moving the expenditure FROM the valid code that DPI used TO the valid code that you choose. If you have any questions about the invalid code information on the Monitoring Letter, please contact Richard Smith at 919.807.3729 or [rsmith@dpi.state.nc.us](mailto:rsmith@dpi.state.nc.us).

**FYI:**

**New E-Rate Contact:** Due to reorganization at the NC Department of Public Instruction, Financial and Business Services will now handle the E-Rate responsibilities. Please contact Stephanie English at 919/807-3686, or by email, [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us), for assistance with this program.

**Bill Status Report:** A Bill Status Report of all education-related bills that have been filed in the General Assembly is attached.

\*\*\*\*\*  
To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.  
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## Bill Status Report – Education & Education Related Bills 2005 General Assembly

### House Bills

| Bill # | Short Title                                           | Primary Sponsor(s)                     | Date Filed | Current Status                                                     |
|--------|-------------------------------------------------------|----------------------------------------|------------|--------------------------------------------------------------------|
| HB 3   | Local Option Education Lottery                        | Owens                                  | 1/26/05    | 1/27/05<br>Ref to Rules of the House                               |
| HB 6   | Amend Lobbying Laws (=SB 612)                         | Hackney                                | 1/26/05    | 1/27/05<br>Ref to Rules of the House                               |
| HB 11  | Clarify School Administrators Certification Standards | LaRoque                                | 1/27/05    | 3/17/05 Passed 2 <sup>nd</sup> & 3 <sup>rd</sup><br>Reading, House |
| HB 15  | Cigarette Tax Increase for Public Health              | Miller                                 | 1/27/05    | 1/31/05<br>Ref to Finance                                          |
| HB 16  | School Curriculum Shall Include Consumer Education    | Miller                                 | 1/27/05    | 1/31/05<br>Ref to Education                                        |
| HB 28  | Study of School Transportation Funding                | Glazier<br>Dickson                     | 2/1/02     | 2/2/05<br>Ref to Education                                         |
| HB 42  | TEACCH Program Funds (=SB 501)                        | Nye                                    | 2/2/05     | 2/3/05<br>Ref to Appropriations                                    |
| HB 50  | Street Gang Prevention Act                            | Michaux<br>Frye                        | 2/2/05     | 2/3/05<br>Ref to Judiciary II                                      |
| HB 59  | Retired School Professionals Return to Work           | McLawhorn<br>Bordsen<br>Warren         | 2/2/05     | 2/3/05<br>Ref to Pensions & Retirement                             |
| HB 84  | Long-Term Care Insurance Tax Credit (=HB 148)         | Nye<br>England<br>Barnhart<br>Earle    | 2/3/05     | 2/7/05<br>Ref to Finance                                           |
| HB 87  | State Employees/Pay Periods                           | Miller                                 | 2/03/05    | 2/7/05<br>Ref to State Personnel                                   |
| HB 106 | Expand Medicaid Eligibility to Children/200%          | Nye<br>England<br>Earle                | 2/7/05     | 2/8/05<br>Ref to Health, if favorable, to<br>Appropriations        |
| HB 127 | Public Employee Poll Workers                          | Insko<br>Preston                       | 2/8/05     | 2/9/05<br>Ref to Election Law &<br>Campaign Finance Reform         |
| HB 129 | State and Local Retirement COLAs                      | Wright                                 | 2/8/05     | 2/9/05<br>Ref to Pensions & Retirement                             |
| HB 148 | Long-Term Care Insurance Tax Credit (=HB 84)          | Howard<br>Sherrill                     | 2/8/05     | 2/9/05<br>Ref to Finance                                           |
| HB 150 | Limit General Fund Spending/Prior Year's Spending     | Gulley                                 | 2/8/05     | 2/9/05<br>Ref to Appropriations                                    |
| HB 151 | Zero-Based Budgeting                                  | Gulley                                 | 2/8/05     | 02/09/2005<br>Ref Appropriations                                   |
| HB 181 | Increase Salary for Beginning Teachers                | Johnson<br>Carney<br>Preston<br>Yongue | 2/9/05     | 2/10/05<br>Ref to Appropriations                                   |
| HB 182 | Charter School Retirement Election                    | Ray<br>Clary                           | 2/9/05     | 2/10/05<br>Ref to Pensions & Retirement                            |
| HB 221 | Expand Teaching Fellows Program (=SB 677)             | Yongue<br>Carney<br>Johnson<br>Preston | 2/14/05    | 2/15/05<br>Ref to Appropriations                                   |
| HB 222 | Coordination of Children's Services/Study             | Insko<br>Barnhart                      | 2/14/05    | 2/15/05<br>Ref to Children, Youth, and                             |

|        |                                                              |                                           |         |                                                                                                                        |
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|        |                                                              |                                           |         | Families, if favorable, to Rules                                                                                       |
| HB 223 | 2005 Education Lottery Referendum                            | B. Allen<br>Hunter                        | 2/14/05 | 2/15/05<br>Ref to Rules of the House                                                                                   |
| HB 224 | Low-Wealth School Supplemental Funding                       | Yongue<br>Preston<br>Glazier<br>Sauls     | 2/14/05 | 2/15/05<br>Ref to Appropriations                                                                                       |
| HB 246 | Additional Funds/Disabled & Gifted Children                  | Preston<br>Johnson<br>Carney<br>Yongue    | 2/15/05 | 2/16/05<br>Ref to Appropriations                                                                                       |
| HB 247 | Retired Teachers Work/No Penalty                             | Preston<br>Carney<br>Johnson<br>Yongue    | 2/15/05 | 2/16/05<br>Ref to Pensions & Retirement, if favorable, to Education                                                    |
| HB 285 | Tax Incentive – Preventive Health Care                       | Pierce                                    | 2/16/05 | 2/17/05<br>Ref to Finance                                                                                              |
| HB 286 | Increase Cigarette Tax                                       | Weiss<br>Justice<br>Womble<br>Glazier     | 2/16/05 | 2/17/05<br>Ref to Finance                                                                                              |
| HB 289 | State Health Plan: No Abortion Coverage Except               | LaRoque                                   | 2/16/05 | 2/17/05<br>Ref to Health, if favorable, to Rules                                                                       |
| HB 315 | Phase Out County Share/Special Assistance                    | Clary                                     | 2/17/05 | 2/21/05<br>Ref to Appropriations                                                                                       |
| HB 316 | Phase Out County Share/Medicaid                              | Clary                                     | 2/17/05 | 2/21/05<br>Ref to Appropriations                                                                                       |
| HR 318 | Permanent House Rules                                        | Culpepper                                 | 2/17/05 | 2/24/05<br>House Adopted                                                                                               |
| HB 323 | State Health Plan/Increase Wellness Benefit                  | Jeffus                                    | 2/17/05 | 2/21/05<br>Ref to Health                                                                                               |
| HB 327 | 2005 Technical Corrections Act                               | Culpepper                                 | 2/21/05 | 2/22/05<br>Ref to Rules of the House                                                                                   |
| HB 366 | Funds for MH/DD/SA Children's Services                       | Insko                                     | 2/23/05 | 2/24/05<br>Ref to Appropriations                                                                                       |
| HB 387 | Social Security # Can't Be Student ID #                      | Barnhart                                  | 2/24/05 | 3/9/05<br>Assigned to Education<br>Subcomm. on Universities                                                            |
| HB 388 | Impact of Student Mobility on Academic Performance (=SB 171) | Folwell                                   | 2/24/05 | 2/28/05<br>Ref to Rules of the House                                                                                   |
| HB 389 | Additional Flexibility on Teacher Pay Date                   | Lucas<br>Glazier<br>McAllister<br>Dickson | 2/24/05 | 2/28/05<br>Ref to Rules of the House                                                                                   |
| HB 402 | Purchase Military Service/Retirement                         | Glazier<br>Eddins                         | 2/28/05 | 3/1/05<br>Ref to Pensions & Retirement                                                                                 |
| HB 403 | Amend Law on Purchase of PSAT for Schools                    | Glazier<br>Parmon                         | 2/28/05 | 3/9/05<br>Assigned to Education<br>Subcomm on Preschool,<br>Elementary and Secondary<br>Education<br>3/17/05 Reptd Fav |
| HB 404 | Repeal Duplicative School Accreditation Requirement          | Glazier<br>Parmon                         | 2/28/05 | 3/1/05<br>Ref to Education                                                                                             |
| HB 413 | Global Education for Students/Study                          | Tolson                                    | 2/28/05 | 3/1/05<br>Ref to Education                                                                                             |
| HB 415 | School Calendar Flexibility After Hurricane Flooding         | Frye                                      | 2/28/05 | 3/9/05                                                                                                                 |

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|         |                                                               |                                       |         | Assigned to Education Subcomm on Preschool, Elementary and Secondary Education           |
| HB 443  | Efficiency: School Board Sales Tax                            | Pate                                  | 3/1/05  | 3/2/05<br>Ref to Education, if favorable, to Finance                                     |
| HB 448  | Complaints Against School Board Members                       | Glazier<br>Yongue<br>Johnson          | 3/1/05  | 3/2/05<br>Ref to Education                                                               |
| HB 452  | State Employee Adverse Weather Leave                          | Miller                                | 3/2/05  | 3/3/05<br>Ref to State Personnel                                                         |
| HB 455  | Funds for Center for International Understanding              | Tolson                                | 3/2/05  | 3/3/05<br>Ref to Appropriations                                                          |
| HJR 468 | Confirm Howard N. Lee to Utilities Commission (=SJR 426)      | Saunders<br>Brubaker                  | 3/2/05  | 3/3/05<br>Ref to Public Utilities<br>3/16/05 Reptd Fav                                   |
| HB 469  | Lease Purchase for School Warehouse                           | Current<br>Clary<br>Rayfield          | 3/2/05  | 3/9/05<br>Assigned to Education Subcomm on Preschool, Elementary and Secondary Education |
| HB 475  | Extend Disability Standard Change                             | Ross                                  | 3/3/05  | 3/7/05<br>Ref to Rules of the House                                                      |
| HB 485  | Charter School Retirement Election                            | Fisher<br>Goforth<br>Sherrill         | 3/3/05  | 3/7/05<br>Ref to Pension & Retirement, if favorable, to Health                           |
| HB 493  | NC Lottery for Education                                      | Holliman                              | 3/3/05  | 3/7/05<br>Ref to Rules of the House                                                      |
| HB 496  | Student Asthma Medications                                    | Harrison<br>Insko                     | 3/3/05  | 3/9/05<br>Assigned to Education Subcomm on Preschool, Elementary and Secondary Education |
| HB 509  | Flexibility on School Calendar Waivers                        | Haire                                 | 3/3/05  | 3/7/05<br>Ref to Rules of the House                                                      |
| HB 512  | Income Tax Credit for Public School Teachers (=SB 561)        | Jeffus<br>Wainwright                  | 3/3/05  | 3/7/05<br>Ref to Finance                                                                 |
| HB 535  | Teachers Convert Personal Leave to Sick Leave                 | Jeffus                                | 3/8/05  | 3/9/05<br>Ref to Education                                                               |
| HB 547  | Edgecombe School Suspension Funds                             | Tolson                                | 3/9/05  | 3/10/05<br>Ref to Appropriations                                                         |
| HB 550  | SBE/Community College/Rulemaking                              | Tolson<br>England<br>Sauls            | 3/9/05  | 3/10/05<br>Ref to Rules of the House                                                     |
| HB 555  | State Health Plan/Annual Mammograms                           | Glazier<br>Insko<br>Jeffus<br>England | 3/9/05  | 3/10/05<br>Refer to Health                                                               |
| HB 563  | Community College May Train Lateral Entry Teachers (= SB 484) | Tolson                                | 3/9/05  | 3/10/05<br>Ref to Education                                                              |
| HB 565  | Funds for State School Technology Fund                        | Tolson                                | 3/9/05  | 3/10/05<br>Ref to Appropriations                                                         |
| HB 595  | Decrease Teachers' Cost for Personal Leave (=SB 557)          | Wainwright                            | 3/10/05 | 3/14/05<br>Ref to Education                                                              |
| HB 602  | Child Nutrition Personnel Bonus Funds                         | Yongue                                | 3/10/05 | 3/14/05<br>Ref to Appropriations                                                         |
| HB 603  | Tuition Grants/Teachers' Children                             | Lucas                                 | 3/10/05 | 3/14/05                                                                                  |

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|        |                                                     |                                        |         | Ref to Education                                                                                   |
| HB 618 | State Health Plan Changes-2. (Blank)                | Wright                                 | 3/10/05 | 3/14/05<br>Ref to Rules of the House                                                               |
| HB 619 | State Health Plan Changes-1 (Blank)                 | Wright                                 | 3/10/05 | 3/14/05<br>Ref to Rules of the House                                                               |
| HB 635 | Public Comment at Local Board Meetings              | Jones                                  | 3/14/05 | 3/15/05<br>Ref to Ways & Means                                                                     |
| HB 637 | Salary of Teachers at Residential Schools           | Nye                                    | 3/14/05 | 3/15/05<br>Ref to State Personnel                                                                  |
| HB 638 | DHHS Schools Get Federal Education Funds            | Nye                                    | 3/14/05 | 3/15/05<br>Ref to Education Subcomm on<br>Preschool, Elementary and<br>Secondary Education         |
| HB 639 | Traveling Science and Technology Funds              | Miller, Walend,<br>Tolson, and Jeffus  | 3/14/05 | 3/15/05<br>Ref to Science & Technology, if<br>favorable, to Appropriations<br>Subcomm on Education |
| HB 640 | Track Students Throughout Their Education           | Miller                                 | 3/14/05 | 3/15/05<br>Ref to Science & Technology, if<br>favorable, to Education                              |
| HB 651 | Bereavement Leave for School Employees              | Wainwright                             | 3/15/05 | 3/16/05<br>Ref to Education                                                                        |
| HB 683 | Add Information on Protecting Newborn to Curriculum | Haire<br>Fisher<br>Justice             | 3/16/05 | 3/17/05<br>Ref to Education Subcomm on<br>Preschool, Elementary and<br>Secondary Education         |
| HB 693 | Base Funding on Learning Needs of Students          | Glazier<br>Parmon                      | 3/16/05 | 3/17/05<br>Ref to Education, if favorable, to<br>Rules of the House                                |
| HB 694 | Child Body Bass Index Data Collection               | Insko                                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                               |
| HB 696 | Study Child Nutrition Services Indirect Costs       | Insko                                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                               |
| HB 701 | Retired School Professionals Return to Work         | Faison                                 | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement                                                            |
| HB 706 | Facilitate Hiring of Teachers                       | Yongue<br>Carney<br>Preston<br>Johnson | 3/16/05 | 3/17/05<br>Ref to Education                                                                        |
| HB 710 | Retirement Systems Technical Corrections            | Bell                                   | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement                                                            |
| HB 711 | Retirement System Cost-of-Living Allowances         | Bell                                   | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement                                                            |
| HB 714 | State Agencies May Withhold Certain Information     | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                  |
| HB 715 | Protect State Employee Records                      | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                  |
| HB 716 | Mediate State Employee Grievance/Time Frame         | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                  |
| HB 717 | State Employee Incentive Bonus Program Changes      | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                  |
| HB 718 | 2005 Current Operations                             | Crawford<br>Owens<br>Sherrill          | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                               |
| HB 719 | 2005 Governor's Budget (= SB 622)                   | Crawford<br>Earle<br>Nye<br>Owens      | 3/16/05 | 3/17/05<br>Ref to Appropriations                                                                   |

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| HB 727 | Health Insurance Portability and Accountability Act Compliance and Fairness | Holliman Wright                  | 3/16/05 | 3/17/05<br>Ref to Insurance                                      |
| HB 730 | State Employment Demonstration Projects                                     | Crawford Sherrill                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                |
| HB 731 | Prospective Elimination of State Personnel Act Longevity Pay                | Crawford                         | 3/16/05 | 3/17/05<br>Ref to State Personnel                                |
| HB 751 | Centralize Benefits Under Office of State Personnel                         | Crawford Holliman                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                |
| HB 755 | Child Nutrition Standards (Study Commission)                                | Insko                            | 3/16/05 | 3/17/05<br>Ref to Rules of the House                             |
| HB 760 | Residential Schools Like Other Public Schools (=SB 630)                     | Nye Farmer-Butterfield           | 3/16/05 | 3/17/05<br>Ref to Education                                      |
| HB 769 | Enrollment Funding in Continuation Budget                                   | McLawnhorn                       | 3/16/05 | 3/17/05<br>Ref to Appropriations                                 |
| HB 773 | Physical Activity Schools <sup>2</sup> (Study Commission)                   | Insko                            | 3/16/05 | 3/17/05<br>Ref to Rules of the House                             |
| HB 776 | 2005 Current Operations                                                     | Earle Nye Clary                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                             |
| HB 779 | Raise Compulsory School Attendance Age                                      | Fisher                           | 3/16/05 | 3/17/05<br>Ref to Education                                      |
| HB 793 | School Counselors & Dropout Prevention/Study (=SB 571)                      | Farmer-Butterfield               | 3/16/05 | 3/17/05<br>Ref to Education, if favorable,<br>Rules of the House |
| HB 805 | Update List of High Priority Schools                                        | Glazier, Parmon, B. Allen, Lucas | 3/17/05 | Filed                                                            |
|        |                                                                             |                                  |         |                                                                  |
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## Senate Bills

| Bill # | Short Title                                  | Primary Sponsor | Date Filed | Current Status                                                                                      |
|--------|----------------------------------------------|-----------------|------------|-----------------------------------------------------------------------------------------------------|
| SB 7   | Hurricane Recovery Act of 2005               | Nesbitt         | 1/27/05    | 2/28/05<br>Ch. SL 2005-1                                                                            |
| SB 34  | Council of State Implementing Statute        | Albertson       | 2/1/05     | 2/2/05<br>Ref to Ways & Means                                                                       |
| SB 35  | Modify Red Light Camera Authorization        | Hoyle           | 2/1/05     | 2/2/05<br>Ref to Judiciary I                                                                        |
| SB 56  | Appoint Most Council Of State Members        | Albertson       | 2/2/05     | 2/3/05<br>Ref to Ways & Means                                                                       |
| SB 71  | State of the State Address/Inviting Governor | Rand            | 2/7/05     | 2/17/05<br>Ratified Ch. Res. 2005-6                                                                 |
| SB 82  | Election Contests                            | Clodfelter      | 2/8/05     | 2/16/05 Passed Senate<br>2/24/05 Passed House<br>3/3/05 Senate Failed to Concur<br>3/10/05 Ratified |
| SB 103 | Lapsed Salaries Revert                       | Brock           | 2/9/05     | 2/10/05<br>Ref to Appropriations/Base Budget                                                        |
| SB 106 | No Abortion Coverage/State Health Plan       | Brock           | 2/9/05     | 2/10/05<br>Ref to Appropriations/Base Budget                                                        |
| SB 113 | Low-Wealth School Supplemental Funding       | Rand            | 2/10/05    | 2/14/05<br>Ref to Appropriations/Base                                                               |



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|        |                                                                  |                   |         | Budget                                                                                             |
| SB 122 | Long-Term Care Insurance Tax Credit                              | Purcell           | 2/10/05 | 2/14/05<br>Ref to Finance                                                                          |
| SB 133 | Reconfirming Provisional Voting                                  | Clodfelter        | 2/14/05 | 2/22/05 Passed Senate<br>3/1/05 Passed House<br>3/2/05<br>Signed by Gov<br>Ratified, Ch. SL 2005-2 |
| SB 139 | Session Limits                                                   | Hoyle             | 2/15/05 | 2/16/05<br>Ref to Ways and Means                                                                   |
| SB 162 | Session Limits                                                   | Phil Berger       | 2/15/05 | 2/16/05<br>Ref to Ways and Means                                                                   |
| SB 171 | Impact of Student Mobility on Academic Performance<br>(= HB 388) | Dalton            | 2/17/05 | 3/10/05<br>Passed 2 <sup>nd</sup> & 3 <sup>rd</sup> Reading                                        |
| SB 181 | Reciprocity for Teachers from Other States                       | Tillman           | 2/22/05 | 2/23/05<br>Ref to Education/Higher<br>Education                                                    |
| SB 183 | Funds for the Schools Attuned Program                            | Rand              | 2/22/05 | 2/23/05<br>Ref to Appropriations/Base<br>Budget                                                    |
| SB 212 | Counties May Provide Funds to Charter Schools                    | Goodall           | 2/23/05 | 2/24/05<br>Ref to Education/Higher<br>Education, if favorable, to<br>Appropriations/Base Budget    |
| SB 213 | Remove Cap on Number of Charter Schools                          | Goodall           | 2/23/05 | 2/24/05<br>Ref to Education/Higher<br>Education, if favorable, to<br>Appropriations/Base Budget    |
| SB 214 | Increase Cigarette Excise Tax By 75 Cents                        | Nesbitt           | 2/23/05 | 2/24/05<br>Ref to Finance                                                                          |
| SB 216 | Coordination of Children's Services/Study                        | Nesbitt           | 2/23/05 | 2/24/05<br>Ref to Health Care, if favorable,<br>to Appropriations/Base Budget                      |
| SB 223 | Public Confidence in Elections                                   | Kinnaid<br>Allran | 2/24/05 | 2/28/05<br>Ref to Judiciary I                                                                      |
| SB 224 | Recasting Lost Votes                                             | Allran<br>Kinnaid | 2/24/05 | 2/28/05<br>Ref to Judiciary I                                                                      |
| SB 227 | Public Employee Poll Workers                                     | Kinnaid           | 2/24/05 | 2/28/05<br>Ref to Judiciary I                                                                      |
| SB 242 | 2005 Technical Corrections Act                                   | Hartsell          | 2/24/05 | 2/28/05<br>Ref to Judiciary II                                                                     |
| SB 254 | School Calendar Flexibility After Hurricane Flooding             | Presnell          | 2/28/05 | 3/1/05<br>Ref to Education/Higher<br>Education                                                     |
| SB 299 | Nonresidential Science and Math Schools/Pilot                    | Dalton            | 3/1/05  | 3/2/05<br>Ref to Appropriations/Base<br>Budget                                                     |
| SB 312 | Charlotte-Mecklenburg School System (Local)<br>(Blank Bill)      | Clodfelter        | 3/2/05  | 3/3/05<br>Ref to Rules of the Senate                                                               |
| SB 322 | Sales Tax Exemption for Schools                                  | Clodfelter        | 3/2/05  | 3/3/05<br>Ref to Finance                                                                           |
| SB 325 | Zero Based Budget                                                | Pittenger         | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base<br>Budget                                                     |
| SB 328 | Children's Advocacy Center Funds                                 | Rand              | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base<br>Budget                                                     |
| SB 333 | Global Education for Students/Study                              | Swindell          | 3/2/05  | 3/3/05                                                                                             |

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|         |                                                              |           |         | Ref to Rules of the Senate                                                            |
| SB 334  | Funds for Center for International Understanding             | Swindell  | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base Budget                                           |
| SB 342  | Lease Purchase for School Warehouse                          | Hoyle     | 3/2/05  | 3/3/05<br>Ref to Finance                                                              |
| SB 345  | Teacher Credit for Excess Personal Leave                     | Lucas     | 3/2/05  | 3/3/05<br>Ref to Education/Higher Education, if favorable, Appropriations/Base Budget |
| SB 362  | Phase Out County Share/Special Assistance                    | Dalton    | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base Budget                                           |
| SB 368  | Franklin School Elections Nonpartisan (Local)                | D. Berger | 3/2/05  | 3/3/05<br>Ref to State & Local Government                                             |
| SB 408  | Study Ways to Reduce Dropout Rate                            | Bingham   | 3/3/05  | 3/7/05<br>Ref to Education/Higher Education                                           |
| SJR 426 | Confirm Howard N. Lee to Utilities Commission (=HJR 468)     | Soles     | 3/7/05  | 3/16/05 Passed 2nd & 3rd Reading, Senate                                              |
| SB 439  | Raise Compulsory School Attendance Age                       | Garwood   | 3/8/05  | 3/9/05<br>Ref to Education/Higher Education                                           |
| SB 456  | Black Child Development Institute Funds                      | Dorsett   | 3/9/05  | 3/10/05 Ref To Com On Appropriations/Base Budget                                      |
| SB 484  | Community College May Train Lateral Entry Teachers (=HB 563) | Swindell  | 3/9/05  | 3/10/05<br>Ref to Education/Higher Education                                          |
| SB 487  | Flag/Pledge of Allegiance in Schools                         | Hunt      | 3/10/05 | 3/15/05<br>Ref to Education/Higher Education                                          |
| SB 490  | Charter Schools Managed Growth Act                           | Shaw      | 3/10/05 | 3/15/05<br>Ref to Education/Higher Education                                          |
| SB 496  | Funds for North Carolina Writing Project                     | Garrou    | 3/10/05 | 3/15/05<br>Ref to Appropriations/Base Budget                                          |
| SB 501  | TEACCH Program Funds (=HB 42)                                | Purcell   | 3/14/05 | 3/15/05<br>Ref to Appropriations/Base Budget                                          |
| SB 545  | Teacher Tax Credit                                           | Forrester | 3/14/05 | 3/15/05<br>Ref to Finance                                                             |
| SB 553  | Amend the Public School Laws - 1 (Blank)                     | Lucas     | 3/14/05 | 3/15/05<br>Ref to Rules of the Senate                                                 |
| SB 554  | Amend the Public School Laws – 2 (Blank)                     | Lucas     | 3/14/05 | 3/15/05<br>Ref to Rules of the Senate                                                 |
| SB 555  | Amend the Public School Laws – 3 (Blank)                     | Lucas     | 3/14/05 | 3/15/05<br>Ref to Rules of the Senate                                                 |
| SB 556  | Planning Time & Duty-Free Lunch for Teachers                 | Lucas     | 3/14/05 | 3/15/05<br>Ref to Education/Higher Education                                          |
| SB 557  | Decrease Teachers' Cost for Personal Leave (= HB 595)        | Lucas     | 3/14/05 | 3/15/05<br>Ref to Education/Higher Education                                          |
| SB 561  | Income Tax Credit for Public School Teachers (=HB 512)       | Cowell    | 3/14/05 | 3/15/05<br>Ref to Finance                                                             |
| SB 567  | Initiative to Close the Achievement Gap                      | Lucas     | 3/15/05 | 3/16/05                                                                               |

|        |                                                         |           |         |                                                                                               |
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|        |                                                         |           |         | Ref to Appropriations/Base Budget                                                             |
| SB 569 | Teacher Scholarships/Funds                              | Swindell  | 3/15/05 | 3/16/05<br>Ref to Education/Higher Education                                                  |
| SB 570 | Extend Sunset on Retired Teachers Provision             | Swindell  | 3/15/05 | 3/16/05<br>Ref to Education/Higher Education, if favorable, to Pension & Retirement and Aging |
| SB 571 | School Counselors & Drop-Out Prevention/Study (=HB 793) | Swindell  | 3/15/05 | 3/16/05<br>Ref to Education/Higher Education                                                  |
| SB 582 | Teacher Loan Program                                    | Forrester | 3/15/05 | 3/16/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 596 | Ag. Curriculum Development Coordinator Funds            | Jenkins   | 3/15/05 | 3/16/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 608 | Edgecombe School Suspension Fund                        | Jenkins   | 3/15/05 | 3/16/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 612 | Amend Lobbying Laws (=HB 6)                             | Rand      | 3/16/05 | 3/17/05<br>Ref to Judiciary I                                                                 |
| SB 622 | 2005 Appropriations Act (=HB 719)                       | Garrou    | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 626 | HIPAA Compliance and Fairness                           | Thomas    | 3/16/05 | 3/17/05<br>Ref to Commerce                                                                    |
| SB 630 | Residential Schools Like Other Public Schools (=HB 760) | Swindell  | 3/16/05 | 3/17/05<br>Ref to Education/Higher Education                                                  |
| SB 637 | Obesity Research Funding                                | Kerr      | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 638 | Reciprocity/Optional Retirement System                  | Stevens   | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement and Aging, if favorable, Appropriations/Base Budget   |
| SB 642 | Mandatory Education for Inmates                         | Shaw      | 3/16/05 | 3/17/05<br>Ref to Education/Higher Education                                                  |
| SB 652 | School Psychologist w/National Cert./Bonus              | Lucas     | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 653 | Middle School Students Get High School Credit           | Brock     | 3/16/05 | 3/17/05<br>Ref to Education/Higher Education                                                  |
| SB 677 | Expand Teaching Fellows Program (=HB 221)               | Nesbitt   | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 678 | Smart Start Funds                                       | Nesbitt   | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 702 | Raise Compulsory School Attendance Age                  | Nesbitt   | 3/17/05 | Filed                                                                                         |
| SB 709 | Salary of Teachers at Residential Schools               | Swindell  | 3/17/05 | Filed                                                                                         |

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**Newsletter No. 027-04/05, April 6, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**Missing BUD Batches:** If you transmitted any BUD batches or budgets/amendments on March 17, please make sure that you did get a communication back on them. DPI's AS/400 lines were down for a brief period on March 17 which means we may not have received your BUD transmission. We have already received calls from several LEAs. Please contact Kathy Horky at [khorky@dpi.state.nc.us](mailto:khorky@dpi.state.nc.us) if you need DPI to pull the missing files from your backup files. Please provide the following information:

For adjustment batches:  
Transaction Type  
Batch Number  
Batch Creation Date

For Budgets/Amendments:  
PRC #  
Fiscal Year  
Whether it is an Initial Budget or an Amendment  
Amendment #

**(1) Additional Fuel Allotment:** Transportation Services has authorized an additional \$4.5 allotment for county LEA's to help compensate for the rapidly increasing cost of diesel fuel. It will be contained in Allotment Revision # 20 on April 13th. The amount for each LEA will be the same as Fuel Cost Adjustment #2 listed on line #12 of the December 1 document "2004-2005 Transportation Funding Information" previously mailed to transportation directors, finance officers and superintendents.

**(2) FY 2004-05 Chart of Accounts:** The following codes have been added to the Chart of Accounts and downloaded to the BUD system today:  
1-5100-012-182 Substitute Pay (Classroom Instruction ONLY), and 1-6410-068-332 Travel. If you have any questions concerning these updates, please contact Richard Smith at [rsmith@dpi.state.nc.us](mailto:rsmith@dpi.state.nc.us) or (919)807-3729.

**(3) Workers' Compensation Insurance:** By now most of you have been advised that the North Carolina School Board Trust has made the decision to no longer offer workers' compensation coverage to North Carolina School Districts for future fund years, effective July 1, 2005. Many of you have been calling DPI for information on how to proceed with obtaining workers' compensation coverage for your locally funded employees after July 1, 2005. NC Statue requires LEA's to purchase or self-insure locally funded employees. Consequently, it is our recommendation that you put your workers' compensation coverage out for bid in order to obtain the best possible coverage and pricing structure. Please request from the School Board Association your detailed workers' compensation loss information for the past 5 years. Additionally, it is necessary that you provide accurate payroll information to avoid future audit penalties. If you would like more information on how to bid your workers' compensation coverage, please contact Eileen Townsend at [etownsen@dpi.state.nc.us](mailto:etownsen@dpi.state.nc.us) or (919) 807-3522.

**(4) New School Number Assignment Request Form:** Effective immediately, please use the New School Number Assignment Request form to request new school numbers. The form is a MS Word document, it can be typed online and printed out to fax or mail. It has been added to the School Attendance & Student Accounting manual: <http://www.ncpublicschools.org/fbs/sasa/schnorequestform.doc>.

**(5) Bill Status Report:** A Bill Status Report of all education-related bills that have been filed in the General Assembly is attached.

**FYI:**

Nancy Harris of the Financial and Business Services Division has left DPI to accept a position with Lenoir County School effective April 1. Jenny Billings, a former DPI employee will be working with us part-time until the position is filled. Jenny can be reached at [jbillings@dpi.state.nc.us](mailto:jbillings@dpi.state.nc.us) or 919.807.3725.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.  
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## Bill Status Report – Education & Education Related Bills 2005 General Assembly

### House Bills

| Bill # | Short Title                                               | Primary Sponsor(s)                  | Date Filed | Current Status                                                                                                                     |
|--------|-----------------------------------------------------------|-------------------------------------|------------|------------------------------------------------------------------------------------------------------------------------------------|
| HB 3   | Local Option Education Lottery                            | Owens                               | 1/26/05    | 1/27/05<br>Ref to Rules of the House<br>3/28/05<br>Ref to Lottery                                                                  |
| HB 6   | Amend Lobbying Laws (=SB 612)                             | Hackney                             | 1/26/05    | 1/27/05<br>Ref to Rules of the House                                                                                               |
| HB 11  | Clarify School Administrators Certification Standards     | LaRoque                             | 1/27/05    | 3/17/05 Passed 2 <sup>nd</sup> & 3 <sup>rd</sup><br>Reading, House<br>3/21/05<br>Ref to Senate Education/Higher Education          |
| HB 15  | Cigarette Tax Increase for Public Health                  | Miller                              | 1/27/05    | 1/31/05<br>Ref to Finance                                                                                                          |
| HB 16  | School Curriculum Shall Include Consumer Education        | Miller                              | 1/27/05    | 1/31/05<br>Ref to Education                                                                                                        |
| HB 28  | Study of School Transportation Funding                    | Glazier<br>Dickson                  | 2/1/02     | 3/29/05, Fav. Report,<br>Education; Re-Ref to<br>Appropriations                                                                    |
| HB 42  | TEACCH Program Funds (=SB 501)                            | Nye                                 | 2/2/05     | 2/3/05<br>Ref to Appropriations                                                                                                    |
| HB 50  | Street Gang Prevention Act                                | Michaux<br>Frye                     | 2/2/05     | 2/3/05<br>Ref to Judiciary II<br>3/29/05<br>Ref to Appropriations                                                                  |
| HB 59  | Retired School Professionals Return to Work               | McLawhorn<br>Bordsen<br>Warren      | 2/2/05     | 2/3/05<br>Ref to Pensions & Retirement                                                                                             |
| HB 84  | Long-Term Care Insurance Tax Credit (=HB 148) & (=SB 122) | Nye<br>England<br>Barnhart<br>Earle | 2/3/05     | 2/7/05<br>Ref to Finance                                                                                                           |
| HB 87  | State Employees/Pay Periods                               | Miller                              | 2/03/05    | 2/7/05<br>Ref to State Personnel                                                                                                   |
| HB 106 | Expand Medicaid Eligibility to Children/200% (=SB 120)    | Nye<br>England<br>Earle             | 2/7/05     | 2/8/05<br>Ref to Health, if favorable, to<br>Appropriations<br>3/1/05<br>Ref to Appropriations                                     |
| HB 127 | Public Employee Poll Workers                              | Insko<br>Preston                    | 2/8/05     | 3/31/05 Fav. Report, Committee<br>on Election Law & Campaign<br>Finance Reform<br>3/31/05<br>House Calendar pursuant Rule<br>36(b) |
| HB 129 | State and Local Retirement COLAs                          | Wright                              | 2/8/05     | 3/23/05 Fav. Report, Pensions &<br>Retirement; Re-Ref to<br>Appropriations                                                         |
| HB 148 | Long-Term Care Insurance Tax Credit (=HB 84)              | Howard<br>Sherrill                  | 2/8/05     | 2/9/05<br>Ref to Finance                                                                                                           |
| HB 150 | Limit General Fund Spending/Prior Year's Spending         | Gulley                              | 2/8/05     | 2/9/05<br>Ref to Appropriations                                                                                                    |

|        |                                                  |                                        |         |                                                                            |
|--------|--------------------------------------------------|----------------------------------------|---------|----------------------------------------------------------------------------|
| HB 151 | Zero-Based Budgeting                             | Gulley                                 | 2/8/05  | 02/09/2005<br>Ref Appropriations                                           |
| HB 181 | Increase Salary for Beginning Teachers           | Johnson<br>Carney<br>Preston<br>Yongue | 2/9/05  | 2/10/05<br>Ref to Appropriations                                           |
| HB 182 | Charter School Retirement Election               | Ray<br>Clary                           | 2/9/05  | 2/10/05<br>Ref to Pensions & Retirement                                    |
| HB 221 | Expand Teaching Fellows Program (=SB 677)        | Yongue<br>Carney<br>Johnson<br>Preston | 2/14/05 | 2/15/05<br>Ref to Appropriations                                           |
| HB 222 | Coordination of Children's Services/Study        | Insko<br>Barnhart                      | 2/14/05 | 2/15/05<br>Ref to Children, Youth, and<br>Families, if favorable, to Rules |
| HB 223 | 2005 Education Lottery Referendum                | B. Allen<br>Hunter                     | 2/14/05 | 2/15/05<br>Ref to Rules of the House<br>3/28/05<br>Ref to Lottery          |
| HB 224 | Low-Wealth School Supplemental Funding (=SB 113) | Yongue<br>Preston<br>Glazier<br>Sauls  | 2/14/05 | 2/15/05<br>Ref to Appropriations                                           |
| HB 246 | Additional Funds/Disabled & Gifted Children      | Preston<br>Johnson<br>Carney<br>Yongue | 2/15/05 | 2/16/05<br>Ref to Appropriations                                           |
| HB 247 | Retired Teachers Work/No Penalty                 | Preston<br>Carney<br>Johnson<br>Yongue | 2/15/05 | 2/16/05<br>Ref to Pensions & Retirement, if<br>favorable, to Education     |
| HB 285 | Tax Incentive – Preventive Health Care           | Pierce                                 | 2/16/05 | 2/17/05<br>Ref to Finance                                                  |
| HB 286 | Increase Cigarette Tax                           | Weiss<br>Justice<br>Womble<br>Glazier  | 2/16/05 | 2/17/05<br>Ref to Finance                                                  |
| HB 289 | State Health Plan: No Abortion Coverage Except   | LaRoque                                | 2/16/05 | 2/17/05<br>Ref to Health, if favorable, to<br>Rules                        |
| HB 315 | Phase Out County Share/Special Assistance        | Clary                                  | 2/17/05 | 2/21/05<br>Ref to Appropriations                                           |
| HB 316 | Phase Out County Share/Medicaid                  | Clary                                  | 2/17/05 | 2/21/05<br>Ref to Appropriations                                           |
| HR 318 | Permanent House Rules                            | Culpepper                              | 2/17/05 | 2/24/05<br>House Adopted                                                   |
| HB 323 | State Health Plan/Increase Wellness Benefit      | Jeffus                                 | 2/17/05 | 2/21/05<br>Ref to Health                                                   |
| HB 327 | 2005 Technical Corrections Act                   | Culpepper                              | 2/21/05 | 2/22/05<br>Ref to Rules of the House                                       |
| HB 366 | Funds for MH/DD/SA Children's Services           | Insko                                  | 2/23/05 | 2/24/05<br>Ref to Appropriations                                           |
| HB 387 | Social Security # Can't Be Student ID #          | Barnhart                               | 2/24/05 | 3/9/05<br>Assigned to Education<br>Subcomm. on Universities                |



|         |                                                              |                                           |         |                                                                                                                                   |
|---------|--------------------------------------------------------------|-------------------------------------------|---------|-----------------------------------------------------------------------------------------------------------------------------------|
| HB 388  | Impact of Student Mobility on Academic Performance (=SB 171) | Folwell                                   | 2/24/05 | 2/28/05<br>Ref to Rules of the House                                                                                              |
| HB 389  | Additional Flexibility on Teacher Pay Date                   | Lucas<br>Glazier<br>McAllister<br>Dickson | 2/24/05 | 2/28/05<br>Ref to Rules of the House                                                                                              |
| HB 402  | Purchase Military Service/Retirement                         | Glazier<br>Eddins                         | 2/28/05 | 3/1/05<br>Ref to Pensions & Retirement                                                                                            |
| HB 403  | Amend Law on Purchase of PSAT for Schools                    | Glazier<br>Parmon                         | 2/28/05 | 3/23/05 Passed 2nd & 3rd<br>Reading, House<br>3/24/05 Senate, Ref To Com On<br>Education/Higher Education                         |
| HB 404  | Repeal Duplicative School Accreditation Requirement          | Glazier<br>Parmon                         | 2/28/05 | 3/31/05 Passed 2nd & 3rd<br>Reading, House                                                                                        |
| HB 407  | Funds for Asthma Education (=SB 767)                         | Wright                                    | 2/28/05 | 3/1/05<br>Ref to Appropriations                                                                                                   |
| HB 410  | Funds for Diabetes Prevention (=SB 770)                      | Wright                                    | 2/28/05 | 3/1/05<br>Ref to Appropriations                                                                                                   |
| HB 413  | Global Education for Students/Study                          | Tolson                                    | 2/28/05 | 3/1/05<br>Ref to Education                                                                                                        |
| HB 415  | School Calendar Flexibility After Hurricane Flooding         | Frye                                      | 2/28/05 | 3/9/05<br>Assigned to Education<br>Subcomm on Preschool,<br>Elementary and Secondary<br>Education                                 |
| HB 424  | Taxpayers' Protection Act (=SB 274)                          | Gulley<br>Kiser<br>Brubaker               | 2/28/05 | 3/1/05<br>Ref to Rules of the Huse                                                                                                |
| HB 443  | Efficiency: School Board Sales Tax                           | Pate                                      | 3/1/05  | 3/2/05<br>Ref to Education, if favorable, to<br>Finance                                                                           |
| HB 448  | Complaints Against School Board Members                      | Glazier<br>Yongue<br>Johnson              | 3/1/05  | 3/2/05<br>Ref to Education                                                                                                        |
| HB 452  | State Employee Adverse Weather Leave                         | Miller                                    | 3/2/05  | 3/3/05<br>Ref to State Personnel                                                                                                  |
| HB 455  | Funds for Center for International Understanding             | Tolson                                    | 3/2/05  | 3/3/05<br>Ref to Appropriations                                                                                                   |
| HJR 468 | Confirm Howard N. Lee to Utilities Commission (=SJR 426)     | Saunders<br>Brubaker                      | 3/2/05  | 3/3/05<br>Ref to Public Utilities<br>3/16/05 Reptd Fav                                                                            |
| HB 469  | Lease Purchase for School Warehouse (=SB 342)                | Current<br>Clary<br>Rayfield              | 3/2/05  | 3/28/05 Fav. Report, Education<br>Subcomm on Preschool,<br>Elementary and Secondary<br>Education<br>3/29/05 Re-ref Com On Finance |
| HB 475  | Extend Disability Standard Change                            | Ross                                      | 3/3/05  | 3/7/05<br>Ref to Rules of the House                                                                                               |
| HB 485  | Charter School Retirement Election                           | Fisher<br>Goforth<br>Sherrill             | 3/3/05  | 3/7/05<br>Ref to Pension & Retirement, if<br>favorable, to Health                                                                 |
| HB 493  | NC Lottery for Education                                     | Holliman                                  | 3/3/05  | 3/7/05<br>Ref to Rules of the House<br>3/28/05<br>Ref to Lottery                                                                  |

|        |                                                               |                                       |         |                                                                                                                                   |
|--------|---------------------------------------------------------------|---------------------------------------|---------|-----------------------------------------------------------------------------------------------------------------------------------|
| HB 496 | Student Asthma Medications                                    | Harrison Insko                        | 3/3/05  | 3/28/05 Fav. Report, Education Subcommittee on Pre-School, Elementary and Secondary Education<br>Placed On House Cal For 4/4/2005 |
| HB 509 | Flexibility on School Calendar Waivers                        | Haire                                 | 3/3/05  | 3/7/05<br>Ref to Rules of the House                                                                                               |
| HB 512 | Income Tax Credit for Public School Teachers (=SB 561)        | Jeffus Wainwright                     | 3/3/05  | 3/7/05<br>Ref to Finance                                                                                                          |
| HB 535 | Teachers Convert Personal Leave to Sick Leave (=SB 345)       | Jeffus                                | 3/8/05  | 3/29/05 Fav. Report, Education; Re-Ref., Pensions & Retirement                                                                    |
| HB 547 | Edgecombe School Suspension Funds                             | Tolson                                | 3/9/05  | 3/10/05<br>Ref to Appropriations                                                                                                  |
| HB 550 | SBE/Community College/Rulemaking                              | Tolson<br>England<br>Sauls            | 3/9/05  | 3/10/05<br>Ref to Rules of the House                                                                                              |
| HB 555 | State Health Plan/Annual Mammograms                           | Glazier<br>Insko<br>Jeffus<br>England | 3/9/05  | 3/10/05<br>Refer to Health                                                                                                        |
| HB 563 | Community College May Train Lateral Entry Teachers (= SB 484) | Tolson                                | 3/9/05  | 3/10/05<br>Ref to Education                                                                                                       |
| HB 565 | Funds for State School Technology Fund                        | Tolson                                | 3/9/05  | 3/10/05<br>Ref to Appropriations                                                                                                  |
| HB 595 | Decrease Teachers' Cost for Personal Leave (=SB 557)          | Wainwright                            | 3/10/05 | 3/14/05<br>Ref to Education                                                                                                       |
| HB 602 | Child Nutrition Personnel Bonus Funds                         | Yongue                                | 3/10/05 | 3/14/05<br>Ref to Appropriations                                                                                                  |
| HB 603 | Tuition Grants/Teachers' Children                             | Lucas                                 | 3/10/05 | 3/14/05<br>Ref to Education                                                                                                       |
| HB 606 | Clarification of Legislative Oversight of Fees (=SB 701)      | Brubaker                              | 3/10/05 | 3/14/05<br>Ref to Rules of the House                                                                                              |
| HB 618 | State Health Plan Changes-2. (Blank)                          | Wright                                | 3/10/05 | 3/14/05<br>Ref to Rules of the House                                                                                              |
| HB 619 | State Health Plan Changes-1 (Blank)                           | Wright                                | 3/10/05 | 3/14/05<br>Ref to Rules of the House                                                                                              |
| HB 635 | Public Comment at Local Board Meetings                        | Jones                                 | 3/14/05 | 3/15/05<br>Ref to Ways & Means                                                                                                    |
| HB 637 | Salary of Teachers at Residential Schools (=SB 709)           | Nye                                   | 3/14/05 | 3/15/05<br>Ref to State Personnel                                                                                                 |
| HB 638 | DHHS Schools Get Federal Education Funds                      | Nye                                   | 3/14/05 | 3/15/05<br>Ref to Education Subcomm on Preschool, Elementary and Secondary Education                                              |
| HB 639 | Traveling Science and Technology Funds                        | Miller, Walend, Tolson, and Jeffus    | 3/14/05 | 3/15/05<br>Ref to Science & Technology, if favorable, to Appropriations Subcomm on Education                                      |
| HB 640 | Track Students Throughout Their Education                     | Miller                                | 3/14/05 | 3/15/05<br>Ref to Science & Technology, if favorable, to Education                                                                |
| HB 651 | Bereavement Leave for School Employees                        | Wainwright                            | 3/15/05 | 3/16/05<br>Ref to Education                                                                                                       |

|        |                                                                                |                                        |         |                                                                                                        |
|--------|--------------------------------------------------------------------------------|----------------------------------------|---------|--------------------------------------------------------------------------------------------------------|
| HB 683 | Add Information on Protecting Newborn to Curriculum                            | Haire<br>Fisher<br>Justice             | 3/16/05 | 3/17/05<br>Ref to Education Subcomm on<br>Preschool, Elementary and<br>Secondary Education             |
| HB 693 | Base Funding on Learning Needs of Students                                     | Glazier<br>Parmon                      | 3/16/05 | 3/17/05<br>Ref to Education, if favorable, to<br>Rules of the House                                    |
| HB 694 | Child Body Bass Index Data Collection                                          | Insko                                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                                   |
| HB 696 | Study Child Nutrition Services Indirect Costs                                  | Insko                                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                                   |
| HB 701 | Retired School Professionals Return to Work                                    | Faison                                 | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement                                                                |
| HB 706 | Facilitate Hiring of Teachers                                                  | Yongue<br>Carney<br>Preston<br>Johnson | 3/16/05 | 3/31/05 Fav. Report, Education<br>Subcommittee on Pre-School,<br>Elementary and Secondary<br>Education |
| HB 710 | Retirement Systems Technical Corrections (=SB 1105)                            | Bell                                   | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement                                                                |
| HB 711 | Retirement System Cost-of-Living Allowances                                    | Bell                                   | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement                                                                |
| HB 714 | State Agencies May Withhold Certain Information                                | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                      |
| HB 715 | Protect State Employee Records                                                 | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                      |
| HB 716 | Mediate State Employee Grievance/Time Frame                                    | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                      |
| HB 717 | State Employee Incentive Bonus Program Changes                                 | Coleman                                | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                      |
| HB 718 | 2005 Current Operations                                                        | Crawford<br>Owens<br>Sherrill          | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                                   |
| HB 719 | 2005 Governor's Budget (= SB 622)                                              | Crawford<br>Earle<br>Nye<br>Owens      | 3/16/05 | 3/17/05<br>Ref to Appropriations                                                                       |
| HB 727 | Health Insurance Portability and Accountability Act<br>Compliance and Fairness | Holliman<br>Wright                     | 3/16/05 | 3/17/05<br>Ref to Insurance                                                                            |
| HB 730 | State Employment Demonstration Projects                                        | Crawford<br>Sherrill                   | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                      |
| HB 731 | Prospective Elimination of State Personnel Act<br>Longevity Pay                | Crawford                               | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                      |
| HB 751 | Centralize Benefits Under Office of State Personnel                            | Crawford<br>Holliman                   | 3/16/05 | 3/17/05<br>Ref to State Personnel                                                                      |
| HB 755 | Child Nutrition Standards (Study Commission)                                   | Insko                                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                                   |
| HB 756 | Lee Local Sales Tax                                                            | Sauls                                  | 3/16/05 | 3/17/05<br>Ref to Finance                                                                              |
| HB 760 | Residential Schools Like Other Public Schools<br>(=SB 630)                     | Nye<br>Farmer-Butterfield              | 3/16/05 | 3/17/05<br>Ref to Education                                                                            |
| HB 769 | Enrollment Funding in Continuation Budget                                      | McLawnhorn                             | 3/16/05 | 3/17/05<br>Ref to Appropriations                                                                       |
| HB 773 | Physical Activity SchoolsI (Study Commission)                                  | Insko                                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                                   |
| HB 776 | 2005 Current Operations                                                        | Earle<br>Nye<br>Clary                  | 3/16/05 | 3/17/05<br>Ref to Rules of the House                                                                   |

|        |                                                                                                           |                                                 |         |                                                                    |
|--------|-----------------------------------------------------------------------------------------------------------|-------------------------------------------------|---------|--------------------------------------------------------------------|
| HB 779 | Raise Compulsory School Attendance Age (=SB 702)                                                          | Fisher                                          | 3/16/05 | 3/17/05<br>Ref to Education                                        |
| HB 783 | Med Administration/Unlicensed Personnel (=SB 662)                                                         | Wright                                          | 3/16/05 | 3/17/05<br>Ref to Health                                           |
| HB 793 | School Counselors & Dropout Prevention/Study (=SB 571)                                                    | Farmer-Butterfield                              | 3/16/05 | 3/17/05<br>Ref to Education, if favorable,<br>Rules of the House   |
| HB 799 | Lapsed Salaries/EEO                                                                                       | Adams                                           | 3/17/05 | 3/21/05<br>Ref to State Personnel                                  |
| HB 800 | State Contracts/Report Outsourcing                                                                        | Glazier<br>Farmer-Butterfield<br>Frye<br>Hilton | 3/17/05 | 3/21/05<br>Ref to Federal Relations &<br>Trade Issues              |
| HB 805 | Update List of High Priority Schools                                                                      | Glazier<br>Parmon<br>B. Allen<br>Lucas          | 3/17/05 | 3/21/05<br>Ref to Education                                        |
| HB 829 | Display of American Flag                                                                                  | Capps<br>Owens<br>Crawford<br>Langdon           | 3/21/05 | 3/22/05<br>Ref to Judiciary I                                      |
| HB 836 | Duties of School Counselors                                                                               | Bell                                            | 3/21/05 | 3/22/05<br>Ref to Education                                        |
| HB 837 | Funds for "We the People" School Competition                                                              | Harrison                                        | 3/21/05 | 3/22/05<br>Ref to Appropriations                                   |
| HB 853 | Reciprocity/Optional Retirement System (=SB 638)                                                          | Insko                                           | 3/21/05 | 3/22/05<br>Ref to Pensions & Retirement                            |
| HB 854 | Funds for Special Olympics                                                                                | Insko<br>Barnhart                               | 3/21/05 | 3/22/05<br>Ref to Appropriations                                   |
| HB 865 | Healthy, Active Children in Grades K-8                                                                    | Bell                                            | 3/22/05 | 3/23/05<br>Ref to Education                                        |
| HB 911 | Streamline School Testing Program                                                                         | Glazier<br>Carney<br>Parmon<br>Dickson          | 3/24/05 | 3/28/05<br>Ref to Education                                        |
| HB 914 | State Budget Act (= SB 1108)                                                                              | Crawford                                        | 3/24/05 | 3/28/05<br>Ref to Appropriations                                   |
| HB 922 | Construction Flexibility/Beaufort Co. Schools                                                             | Williams                                        | 3/24/05 | 3/28/05<br>Ref to Local Government I                               |
| HB 927 | Additional Teacher Scholarship Loans (=SB 1051)                                                           | Yongue                                          | 3/24/05 | 2/28/05<br>Ref to Appropriations                                   |
| HB 928 | State Government Fair Wage Funds/Study Fair Pay (=SB 908)                                                 | Ross<br>Earle<br>Alexander<br>Weiss             | 3/24/05 | 3/28/05<br>Ref to State Personnel, if<br>favorable, Appropriations |
| HB 931 | Tax Fairness in Education                                                                                 | Stam                                            | 3/24/05 | 3/28/05<br>Ref to Finance                                          |
| HB 965 | Durham Impact Fee for Schools (Local)                                                                     | Miller<br>Luebke<br>Michaux<br>Wilkins          | 3/28/05 | 3/29/05<br>Ref to Finance                                          |
| HB 969 | Treatment and Education of Autistic and Other Communications Handicapped Children and Adults Autism Funds | Nye                                             | 3/28/05 | 3/29/05<br>Ref to Appropriations                                   |
| HB 970 | Special Olympics Funds (=SB 876)                                                                          | Nye                                             | 3/28/05 | 3/29/05<br>Ref to Appropriations                                   |

|         |                                                          |                                                      |         |                                                                                            |
|---------|----------------------------------------------------------|------------------------------------------------------|---------|--------------------------------------------------------------------------------------------|
| HB 1007 | Written Parental Consent for School Surveys              | Stam<br>McGee<br>Capps                               | 3/30/05 | 3/31/05<br>Ref to Education                                                                |
| HB 1014 | Rockingham School Elections (Blank)                      | Cole                                                 | 3/30/05 | 3/31/05<br>Ref to Rules of the House                                                       |
| HB 1017 | Mecklenburg Education Freedom Act                        | Rhodes<br>Gulley                                     | 3/30/05 | 3/31/05<br>Ref to Education                                                                |
| HB 1022 | Fair Pay in State Gov't/Managers Accountable             | Ross<br>B. Allen<br>Weiss<br>Coleman                 | 3/30/05 | 3/31/05<br>Ref to State Personnel                                                          |
| HB 1023 | North Carolina State Lottery Act                         | Owens, B. Allen,<br>Holliman,<br>LaRoque             | 3/30/05 | 3/31/05 Ref To House Select<br>Committee on the Lottery                                    |
| HB 1032 | Placing Students in Seclusion (=SB 906)                  | Glazier<br>Preston<br>Farmer-Butterfield<br>Barnhart | 3/30/05 | 3/31/05<br>Ref to Education Subcomm on<br>Preschool, Elementary and<br>Secondary Education |
| HB 1033 | Smart Start Funds                                        | Wright<br>Jeffus                                     | 3/30/05 | 3/31/05<br>Ref to Appropriations                                                           |
| HB 1034 | Study Success Centers/New Hanover Schools                | Wright                                               | 3/30/05 | 3/31/05<br>Ref to Local Government I                                                       |
| HB 1055 | Jones School Board Vacancies                             | Preston                                              | 3/30/05 | 3/31/05<br>Ref to Local Government II                                                      |
| HB 1059 | Public School Health Curriculum                          | Wright<br>B. Allen                                   | 3/30/05 | 3/31/05<br>Ref to Education                                                                |
| HB 1071 | Business Educ. Tech. Alliance Legislation (=SB 1052)     | Tolson                                               | 3/30/05 | 3/31/05<br>Ref to Education, if favorable, to<br>Appropriations                            |
| HB 1073 | Extend Sunset/Retired Teachers Return to Work            | Rapp<br>McLawhorn                                    | 3/30/05 | 3/31/05<br>Ref to Pensions & Retirement                                                    |
| HB 1074 | Clarify School Admissions Procedures                     | Daughtry                                             | 3/30/05 | 3/31/05<br>Ref to Education                                                                |
| HB 1076 | Study Success Centers/New Hanover Schools                | Wright                                               | 3/30/05 | 3/31/05<br>Ref to Education                                                                |
| HB 1079 | Study Raising the Compulsory Attendance Age<br>(=SB 878) | Parmon<br>Glazier<br>Womble<br>McLawhorn             | 3/30/95 | 3/31/05<br>Ref to Education, if favorable, to<br>Rules of the House                        |

## Senate Bills

| Bill # | Short Title                                  | Primary Sponsor | Date Filed | Current Status                      |
|--------|----------------------------------------------|-----------------|------------|-------------------------------------|
| SB 7   | Hurricane Recovery Act of 2005               | Nesbitt         | 1/27/05    | 2/28/05<br>Ch. SL 2005-1            |
| SB 34  | Council of State Implementing Statute        | Albertson       | 2/1/05     | 2/2/05<br>Ref to Ways & Means       |
| SB 35  | Modify Red Light Camera Authorization        | Hoyle           | 2/1/05     | 2/2/05<br>Ref to Judiciary I        |
| SB 56  | Appoint Most Council Of State Members        | Albertson       | 2/2/05     | 2/3/05<br>Ref to Ways & Means       |
| SB 71  | State of the State Address/Inviting Governor | Rand            | 2/7/05     | 2/17/05<br>Ratified Ch. Res. 2005-6 |

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|--------|---------------------------------------------------------------|--------------------|---------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| SB 82  | Election Contests                                             | Clodfelter         | 2/8/05  | 2/16/05 Passed Senate<br>2/24/05 Passed House<br>3/3/05 Senate Failed to Concur<br>3/10/05 Ratified                                              |
| SB 103 | Lapsed Salaries Revert                                        | Brock              | 2/9/05  | 2/10/05<br>Ref to Appropriations/Base Budget                                                                                                     |
| SB 106 | No Abortion Coverage/State Health Plan                        | Brock              | 2/9/05  | 2/10/05<br>Ref to Appropriations/Base Budget                                                                                                     |
| SB 113 | Low-Wealth School Supplemental Funding (=HB 224)              | Rand               | 2/10/05 | 2/14/05<br>Ref to Appropriations/Base Budget                                                                                                     |
| SB 122 | Long-Term Care Insurance Tax Credit                           | Purcell            | 2/10/05 | 2/14/05<br>Ref to Finance                                                                                                                        |
| SB 133 | Reconfirming Provisional Voting                               | Clodfelter         | 2/14/05 | 2/22/05 Passed Senate<br>3/1/05 Passed House<br>3/2/05<br>Signed by Gov<br>Ratified, Ch. SL 2005-2                                               |
| SB 139 | Session Limits                                                | Hoyle              | 2/15/05 | 2/16/05<br>Ref to Ways and Means                                                                                                                 |
| SB 162 | Session Limits                                                | Phil Berger        | 2/15/05 | 2/16/05<br>Ref to Ways and Means                                                                                                                 |
| SB 171 | Impact of Student Mobility on Academic Performance (= HB 388) | Dalton             | 2/17/05 | 3/10/05 Passed 2 <sup>nd</sup> & 3 <sup>rd</sup><br>Reading, Senate;<br>3/15/05 Ref To Com On Rules,<br>Calendar, and Operations of the<br>House |
| SB 181 | Reciprocity for Teachers from Other States                    | Tillman            | 2/22/05 | 2/23/05<br>Ref to Education/Higher<br>Education<br>3/23/05 Subcommittee<br>Appointed                                                             |
| SB 183 | Funds for the Schools Attuned Program                         | Rand               | 2/22/05 | 2/23/05<br>Ref to Appropriations/Base<br>Budget                                                                                                  |
| SB 212 | Counties May Provide Funds to Charter Schools                 | Goodall            | 2/23/05 | 2/24/05<br>Ref to Education/Higher<br>Education, if favorable, to<br>Appropriations/Base Budget                                                  |
| SB 213 | Remove Cap on Number of Charter Schools                       | Goodall            | 2/23/05 | 2/24/05<br>Ref to Education/Higher<br>Education, if favorable, to<br>Appropriations/Base Budget                                                  |
| SB 214 | Increase Cigarette Excise Tax By 75 Cents                     | Nesbitt            | 2/23/05 | 2/24/05<br>Ref to Finance                                                                                                                        |
| SB 216 | Coordination of Children's Services/Study                     | Nesbitt            | 2/23/05 | 2/24/05<br>Ref to Health Care, if favorable,<br>to Appropriations/Base Budget                                                                    |
| SB 223 | Public Confidence in Elections                                | Kinnaird<br>Allran | 2/24/05 | 2/28/05<br>Ref to Judiciary I                                                                                                                    |
| SB 224 | Recasting Lost Votes                                          | Allran<br>Kinnaird | 2/24/05 | 2/28/05<br>Ref to Judiciary I                                                                                                                    |
| SB 227 | Public Employee Poll Workers                                  | Kinnaird           | 2/24/05 | 2/28/05<br>Ref to Judiciary I                                                                                                                    |

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| SB 242  | 2005 Technical Corrections Act                               | Hartsell   | 2/24/05 | 2/28/05<br>Ref to Judiciary II                                                                         |
| SB 254  | School Calendar Flexibility After Hurricane Flooding         | Presnell   | 2/28/05 | 3/1/05<br>Ref to Education/Higher Education                                                            |
| SB 274  | Taxpayers' Protection Act (=HB 424)                          | Smith      | 3/1/05  | 3/2/05<br>Ref to Ways & Means                                                                          |
| SB 299  | Nonresidential Science and Math Schools/Pilot                | Dalton     | 3/1/05  | 3/2/05<br>Ref to Appropriations/Base Budget                                                            |
| SB 312  | Charlotte-Mecklenburg School System (Local) (Blank)          | Clodfelter | 3/2/05  | 3/3/05<br>Ref to Rules of the Senate                                                                   |
| SB 322  | Sales Tax Exemption for Schools                              | Clodfelter | 3/2/05  | 3/3/05<br>Ref to Finance                                                                               |
| SB 325  | Zero Based Budget                                            | Pittenger  | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base Budget                                                            |
| SB 328  | Children's Advocacy Center Funds                             | Rand       | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base Budget                                                            |
| SB 333  | Global Education for Students/Study                          | Swindell   | 3/2/05  | 3/3/05<br>Ref to Rules of the Senate                                                                   |
| SB 334  | Funds for Center for International Understanding             | Swindell   | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base Budget                                                            |
| SB 342  | Lease Purchase for School Warehouse (=HB 469)                | Hoyle      | 3/2/05  | 3/3/05<br>Ref to Finance                                                                               |
| SB 345  | Teacher Credit for Excess Personal Leave (=HB 535)           | Lucas      | 3/2/05  | 3/3/05<br>Ref to Education/Higher Education, if favorable, Appropriations/Base Budget                  |
| SB 362  | Phase Out County Share/Special Assistance                    | Dalton     | 3/2/05  | 3/3/05<br>Ref to Appropriations/Base Budget                                                            |
| SB 368  | Franklin School Elections Nonpartisan (Local)                | D. Berger  | 3/2/05  | 3/3/05<br>Ref to State & Local Government                                                              |
| SB 408  | Study Ways to Reduce Dropout Rate                            | Bingham    | 3/3/05  | 3/24/05 Senate – Passed 2 <sup>nd</sup> & 3 <sup>rd</sup> Readings<br>3/29/05 House - Ref to Education |
| SJR 426 | Confirm Howard N. Lee to Utilities Commission (=HJR 468)     | Soles      | 3/7/05  | 3/16/05 Passed 2nd & 3rd Reading, Senate                                                               |
| SB 439  | Raise Compulsory School Attendance Age                       | Garwood    | 3/8/05  | 3/9/05<br>Ref to Education/Higher Education                                                            |
| SB 456  | Black Child Development Institute Funds                      | Dorsett    | 3/9/05  | 3/10/05 Ref To Com On Appropriations/Base Budget                                                       |
| SB 484  | Community College May Train Lateral Entry Teachers (=HB 563) | Swindell   | 3/9/05  | 3/10/05<br>Ref to Education/Higher Education                                                           |
| SB 487  | Flag/Pledge of Allegiance in Schools                         | Hunt       | 3/10/05 | 3/15/05<br>Ref to Education/Higher Education                                                           |
| SB 490  | Charter Schools Managed Growth Act                           | Shaw       | 3/10/05 | 3/15/05<br>Ref to Education/Higher Education                                                           |

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| SB 496 | Funds for North Carolina Writing Project                | Garrou    | 3/10/05 | 3/15/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 501 | TEACCH Program Funds (=HB 42)                           | Purcell   | 3/14/05 | 3/15/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 545 | Teacher Tax Credit                                      | Forrester | 3/14/05 | 3/15/05<br>Ref to Finance                                                                     |
| SB 553 | Amend the Public School Laws - 1 (Blank)                | Lucas     | 3/14/05 | 3/15/05<br>Ref to Rules of the Senate                                                         |
| SB 554 | Amend the Public School Laws – 2 (Blank)                | Lucas     | 3/14/05 | 3/15/05<br>Ref to Rules of the Senate                                                         |
| SB 555 | Amend the Public School Laws – 3 (Blank)                | Lucas     | 3/14/05 | 3/15/05<br>Ref to Rules of the Senate                                                         |
| SB 556 | Planning Time & Duty-Free Lunch for Teachers            | Lucas     | 3/14/05 | 3/15/05<br>Ref to Education/Higher Education                                                  |
| SB 557 | Decrease Teachers' Cost for Personal Leave (= HB 595)   | Lucas     | 3/14/05 | 3/15/05<br>Ref to Education/Higher Education                                                  |
| SB 561 | Income Tax Credit for Public School Teachers (=HB 512)  | Cowell    | 3/14/05 | 3/15/05<br>Ref to Finance                                                                     |
| SB 567 | Initiative to Close the Achievement Gap                 | Lucas     | 3/15/05 | 3/16/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 569 | Teacher Scholarships/Funds                              | Swindell  | 3/15/05 | 3/16/05<br>Ref to Education/Higher Education                                                  |
| SB 570 | Extend Sunset on Retired Teachers Provision             | Swindell  | 3/15/05 | 3/16/05<br>Ref to Education/Higher Education, if favorable, to Pension & Retirement and Aging |
| SB 571 | School Counselors & Drop-Out Prevention/Study (=HB 793) | Swindell  | 3/15/05 | 3/16/05<br>Ref to Education/Higher Education                                                  |
| SB 582 | Teacher Loan Program                                    | Forrester | 3/15/05 | 3/16/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 596 | Ag. Curriculum Development Coordinator Funds            | Jenkins   | 3/15/05 | 3/16/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 608 | Edgecombe School Suspension Fund                        | Jenkins   | 3/15/05 | 3/16/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 612 | Amend Lobbying Laws (=HB 6)                             | Rand      | 3/16/05 | 3/17/05<br>Ref to Judiciary I                                                                 |
| SB 622 | 2005 Appropriations Act (=HB 719)                       | Garrou    | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                  |
| SB 626 | HIPAA Compliance and Fairness                           | Thomas    | 3/16/05 | 3/17/05<br>Ref to Commerce                                                                    |
| SB 630 | Residential Schools Like Other Public Schools (=HB 760) | Swindell  | 3/16/05 | 3/31/05 Senate – Passed 2 <sup>nd</sup> & 3 <sup>rd</sup> Readings                            |
| SB 637 | Obesity Research Funding                                | Kerr      | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                  |



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| SB 638 | Reciprocity/Optional Retirement System (=HB 853)         | Stevens   | 3/16/05 | 3/17/05<br>Ref to Pensions & Retirement and Aging, if favorable, Appropriations/Base Budget |
| SB 642 | Mandatory Education for Inmates                          | Shaw      | 3/16/05 | 3/17/05<br>Ref to Education/Higher Education                                                |
| SB 652 | School Psychologist w/National Cert./Bonus               | Lucas     | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                |
| SB 653 | Middle School Students Get High School Credit            | Brock     | 3/16/05 | 3/17/05<br>Ref to Education/Higher Education                                                |
| SB 663 | Asthma Meds/Student Self-Administration                  | Purcell   | 3/16/05 | 3/17/05<br>Ref to Health Care                                                               |
| SB 677 | Expand Teaching Fellows Program (=HB 221)                | Nesbitt   | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                |
| SB 678 | Smart Start Funds                                        | Nesbitt   | 3/16/05 | 3/17/05<br>Ref to Appropriations/Base Budget                                                |
| SB 691 | Pro Tem Appointments Bill – 1                            | Rand      | 3/17/05 | 3/21/05<br>Ref to Rules of the Senate                                                       |
| SB 701 | Clarification of Legislative Oversight of Fees (=HB 606) | Nesbitt   | 3/17/05 | 3/21/05<br>Ref to Judiciary I                                                               |
| SB 702 | Raise Compulsory School Attendance Age (=HB 779)         | Nesbitt   | 3/17/05 | 3/21/05<br>Ref to Education/Higher Education                                                |
| SB 709 | Salary Supplement/Certain Ed. Programs (=HB 637)         | Swindell  | 3/17/05 | 3/30/05 Fav. Report, Education/Higher Education; Placed On Cal For 4/6/2005                 |
| SB 728 | Salary of School Nurse w/Dev. Disability Cert.           | P. Berger | 3/21/05 | 3/22/05<br>Ref to Education/Higher Education, if favorable, to Appropriations/Base Budget   |
| SB 733 | Street Gang Prevention Act                               | Graham    | 3/21/05 | 3/22/05<br>Ref to Judiciary II                                                              |
| SB 741 | UNC Health Plan Pilot                                    | Rand      | 3/21/05 | Filed                                                                                       |
| SB 750 | State Health Plan/Medicare Drug Copayments               | Rand      | 3/21/05 | Filed                                                                                       |
| SB 751 | State Health Plan/Options                                | Rand      | 3/21/05 | Filed                                                                                       |
| SB 752 | Low-Wealth Comm. Colleges Retain Funds                   | Rand      | 3/21/05 | 3/22/05<br>Ref to Appropriations/Base Budget                                                |
| SB 753 | Funds to Help Children with Cochlear Implants            | Rand      | 3/21/05 | 3/22/05<br>Ref to Appropriations/Base Budget                                                |
| SB 761 | Funds for Center for Emerging Technologies               | Garrou    | 3/21/05 | 3/22/05<br>Ref to Appropriations/Base Budget                                                |
| SB 764 | Health Insurance/Assignment of Benefits                  | Purcell   | 3/21/05 | 3/22/05<br>Ref to Commerce                                                                  |
| SB 767 | Funds for Asthma Education (=HB 407)                     | Purcell   | 3/21/05 | 3/22/05<br>Ref to Appropriations/Base Budget                                                |
| SB 770 | Funds for Diabetes Prevention (=HB 410)                  | Purcell   | 3/21/05 | 3/22/05<br>Ref to Appropriations/Base Budget                                                |

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| SB 793 | Government Agencies Limit Release of SSNs                 | P. Berger  | 3/22/05 | 3/23/05<br>Ref to Judiciary I                                                             |
| SB 821 | Permissible School Bus Routes Modified                    | Jenkins    | 3/22/05 | 3/23/05<br>Ref to Education/Higher Education                                              |
| SB 831 | Safe Transportation for School Students (Blank)           | Smith      | 3/22/05 | 3/23/05<br>Ref to Rules of the Senate                                                     |
| SB 837 | State Health Plan/10-Year Vesting                         | Kerr       | 3/22/05 | 3/23/05<br>Ref to Appropriations/Base Budget                                              |
| SB 854 | Teacher Recruitment & Retention Incentives                | Clodfelter | 3/22/05 | 3/23/05<br>Ref to Education/Higher Education, if favorable, to Appropriations/Base Budget |
| SB 862 | Special Diplomas to Korea and Vietnam Vets                | D. Berger  | 3/22/05 | 3/23/05<br>Ref to Education/Higher Education                                              |
| SB 864 | Workers' Comp/Injury to Extremities                       | D. Berger  | 3/22/05 | 3/23/05<br>Ref to Judiciary II                                                            |
| SB 865 | Workers' Comp/Employee Work Incentive                     | D. Berger  | 3/22/05 | 3/23/05<br>Ref to Judiciary II                                                            |
| SB 866 | Increase Cap on Loss of Workers' Organ.                   | D. Berger  | 3/22/05 | 3/23/05<br>Ref to Judiciary II                                                            |
| SB 876 | Special Olympics Funds (= HB 970)                         | Purcell    | 3/22/05 | 3/23/05<br>Ref to Appropriations/Base Budget                                              |
| SB 878 | Study Raising the Compulsory Attendance Age (=HB 1079)    | Garrou     | 3/22/05 | 3/23/05<br>Ref to Rules of the Senate                                                     |
| SB 885 | Reduce Tax/Cut Government Spending                        | Pittenger  | 3/22/05 | 3/23/05<br>Ref to Finance                                                                 |
| SB 886 | Classroom Experience for School Personnel                 | Hartsell   | 3/22/05 | 3/23/05<br>Ref to Education/Higher Education                                              |
| SB 888 | Various State Personnel Law Changes                       | Rand       | 3/22/05 | 3/23/05<br>Ref to Appropriations/Base Budget                                              |
| SB 893 | State Health Plan Subrogation                             | Rand       | 3/22/05 | 3/23/05<br>Ref to Judiciary I                                                             |
| SB 894 | Strengthen State Health Plan-1 (Blank)                    | Rand       | 3/22/05 | Filed                                                                                     |
| SB 898 | Study of Workforce Preparation in Schools                 | Brown      | 3/22/05 | 3/23/05<br>Ref to Rules of the Senate                                                     |
| SB 906 | Placing Students in Seclusion (=HB 1032)                  | Dorsett    | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                              |
| SB 908 | State Government Fair Wage Funds/Study Fair Pay (=HB 928) | Dorsett    | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                              |
| SB 910 | Retirement Beneficiary Designation                        | Dorsett    | 3/23/05 | 3/24/05<br>Ref to Pensions & Retirement and Aging                                         |
| SB 912 | Teach Financial Literacy in Public Schools (Blank)        | Hagan      | 3/23/05 | 3/24/05<br>Ref to Rules of the Senate                                                     |
| SB 923 | Labor/Mandatory Lunch Break                               | Clodfelter | 3/23/05 | 3/24/05<br>Ref to Commerce                                                                |
| SB 931 | Raise Cigarette Tax for Medicaid                          | Clodfelter | 3/23/05 | 3/24/05<br>Ref to Finance                                                                 |
| SB 932 | Protect Confidential Info of Public Agencies              | Clodfelter | 3/23/05 | 3/24/05<br>Ref to Judiciary I                                                             |

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| SB 941  | Flag, Pledge, and Symbols Taught in Schools          | Thomas          | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                                   |
| SB 942  | Establish Child Assessment Responses (=H 277)        | Thomas          | 3/23/05 | 3/24/05<br>Ref to Health Care                                                                  |
| SB 958  | School Psychologist w/National Cert./Bonus           | Lucas           | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                                   |
| SB 959  | Teacher Assistant Salary Schedule (Blank)            | Lucas           | 3/23/05 | 3/24/05<br>Ref to Rules of the Senate                                                          |
| SB 960  | Study Child Nutrition Services Indir. Costs (Blank)  | Purcell         | 3/23/05 | 3/24/05<br>Ref to Health Care                                                                  |
| SB 961  | Child Nutrition Standards (Blank)                    | Purcell         | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                                   |
| SB 965  | Education Improvement Act of 2005                    | Dalton Swindell | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                                   |
| SB 969  | Amend Workers' Comp. Act-3 (Blank)                   | D. Berger       | 3/23/05 | 3/24/05<br>Ref to Rules of the Senate                                                          |
| SB 975  | Retirement System COLAs (=H 711)                     | Dannelly        | 3/23/05 | 3/24/05<br>Ref to Pensions & Retirement and Aging, if favorable, to Appropriations/Base Budget |
| SB 987  | K-8 Testing Reform Act of 2005                       | Apodaca         | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                                   |
| SB 995  | Assess Administrative Needs/Education System         | Pittenger       | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                                   |
| SB 1004 | State Personnel/Discrimination                       | Shaw            | 3/23/05 | 3/24/05<br>Ref to Judiciary II                                                                 |
| SB 1005 | Education Standards/Voc Rehab. Professionals         | Lucas           | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                                   |
| SB 1007 | Free Tuition/School Teachers' Children               | Hagan           | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                                   |
| SB 1010 | Study Salary Inc. of Math & Science Teachers         | Hagan           | 3/23/05 | 3/24/05<br>Ref to Rules of the Senate                                                          |
| SB 1024 | Equalize Newborn Coverage/State Health Plan          | Kinnaird        | 3/23/05 | Filed                                                                                          |
| SB 1051 | Additional Teacher Scholarship Loans (=HB 927)       | Garrou          | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education, if favorable, to Appropriations/Base Budget      |
| SB 1052 | Business Educ. Tech. Alliance Legislation (=HB 1071) | Garrou          | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education, if favorable, Appropriations/Base Budget         |
| SB 1053 | Historically Black Colleges/Scholarship Funds        | Garrou          | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                                   |
| SB 1057 | Education Improvement Act of 2005                    | Dalton          | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                                   |

|         |                                                    |           |         |                                                                                           |
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| SB 1060 | Student Education Elections                        | Goodall   | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education, if favorable, to Appropriations/Base Budget |
| SB 1065 | College of Education at ASU/Funds                  | Garwood   | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                              |
| SB 1075 | NC Education Lottery                               | Rand      | 3/23/05 | 3/24/05<br>Ref to Ways & Means                                                            |
| SB 1076 | Scholar Student/NC Resident                        | Rand      | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                              |
| SB 1090 | Playground Equipment from Smart Start Funds        | Kerr      | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                              |
| SB 1094 | State Employees/Teachers Pay Increases             | Holloman  | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                              |
| SB 1095 | 2005 State Lottery for Education/Seniors           | Boseman   | 3/23/05 | 3/24/05<br>Ref to Ways & Means                                                            |
| SB 1096 | Flag, Pledge, and Symbols Taught in Schools        | Boseman   | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                              |
| SB 1105 | Retirement Systems Technical Corrections (=HB 710) | Nesbitt   | 3/23/05 | 3/24/05<br>Ref to Pensions & Retirement and Aging                                         |
| SB 1108 | State Budget Act (=HB 914)                         | Hagan     | 3/23/05 | 3/24/05<br>Ref to Appropriations/Base Budget                                              |
| SB 1136 | Textbooks Selected at the Local Level              | Brock     | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                              |
| SB 1139 | Academic Bill of Rights                            | Brock     | 3/23/05 | 3/24/05<br>Ref to Education/Higher Education                                              |
| SB 1148 | State Use of Alternative Fuel Vehicles             | Jenkins   | 3/23/05 | 3/24/05<br>Ref to Agriculture/Environment/Natural Resources, if favorable, to Finance     |
| SB 1151 | Amend Workers' Comp. Act-1 (Blank)                 | D. Berger | 3/23/05 | 3/24/05<br>Ref to Rules of the Senate                                                     |
| SB 1153 | State of the Child Annual Report                   | Atwater   | 3/23/05 | 3/24/05<br>Ref to Health Care                                                             |

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**Newsletter No. 028-04/05, April 14, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) School Closings Survey:** All LEAs and Charter Schools are required to complete the School Closings Survey for school year 2004-05. Please complete the online survey and submit by May 19, 2005. The survey can be found on the Financial Business Services website at <http://www.ncpublicschools.org/fbs> under "What's New". If you have questions about the survey, please contact Kendall Jordan at [kjordan@dpi.state.nc.us](mailto:kjordan@dpi.state.nc.us) or 919-807-3721.

**(2) Change in Existing Charter School Funding Policy** - This is a reminder that the LEA's initial allotment will be reduced for any allowable growth in the charter schools ADM from their LEA over the planning ADM. In past years, the Charter Schools were funded up to a 10% growth from a State Reserve and anything in excess allowed over that 10% was treated like a new charter and funding was reduced from the LEA's initial allotment. This year, all of the growth in the charter school over planning will be reduced from the LEA's initial allotment. Please refer back to your FY 2005-06 Planning Allotment letter. Contact School Allotments at (919) 807-3739 if you have questions.

**(3) REMINDER: SCHOOL BUS IDLING SURVEY:** Transportation directors were emailed a survey from Ben Matthews regarding the current status of local policies and procedures aimed at reducing school bus idling. Reduced idling is good for the environment, children's health and conserving fuel. This survey will be the basis for providing accurate information to the State Board, the General Assembly, the State Budget Office and the Department of Environment and Natural Resources. The survey is due April 15th. Contact Ben Matthews (919) 807-3500.

**(4) Missing BUD Batches:** If you transmitted any BUD batches or budgets/amendments on March 17, please make sure that you did get a communication back on them. DPI's AS/400 lines were down for a brief period on March 17 which means we may not have received your BUD transmission. We have already received calls from several LEAs. Please contact Kathy Horky at [khorky@dpi.state.nc.us](mailto:khorky@dpi.state.nc.us) if you need DPI to pull the missing files from your backup files. Please provide the following information:

For adjustment batches:

Transaction Type  
Batch Number  
Batch Creation Date

For Budgets/Amendments:

PRC #  
Fiscal Year  
Whether it is an Initial Budget or an Amendment  
Amendment #

**(5) Allotment Policy Manual:** The FY 2004-05 Allotment Policy Manual is now on the web at <http://www.ncpublicschools.org/fbs/allot/index.html>. A table of Allotment Categories by PRC has been added for easy access to the policy. Please contact School Allotments at (919) 807-3739 if you have questions.

**(6) New School Allotments Website:** The New School Allotment website at <http://www.ncpublicschools.org/fbs/schlbus/allotments/index.html> is now available. It has all of the FY 2005-06 State and Federal Planning Allotment information as well as other data that may be helpful. Please visit the site and let us know what you think. Please contact School Allotments at (919) 807-3739 if you have questions.

**(7) The LEA Finance Office Guide** (aka The Jungle Book or Training Guide) is online. It is on the FBS Manuals page and is featured temporarily on the FBS home page under "What's New."

**(8) State Board Meeting Highlights:** Last week, the State Board of Education approved a revision of Initial Licensure and Continuing Licensure Requirements to facilitate the employment of teachers. The revisions would replace the current Initial License with a Standard Professional License 1 and the current Continuing License would be replaced with the Standard Professional License 2. To be issued a Standard Professional License an individual must have three years of satisfactory teaching experience, at least one of which must be in North Carolina; and have the

recommendation of the employing LEA; complete any professional development activities prescribed by the LEA; and satisfy North Carolina testing requirements or hold National Board Certification or submit documentation of the ability to positively impact student achievement or satisfactorily complete the NC High, Objective, Uniform, State Standard of Evaluation for the license areas. The Board also approved a revision of its Healthy Active Children Policy to include a requirement for 30 minutes of daily physical activity in grades K-8 that will occur during the school day. This physical activity may include, but is not limited to, physical education, energizers, recess and intramurals. To read more about these items and other Board actions, please read the Board meeting highlights, which will be posted online by Tuesday afternoon at <http://www.ncpublicschools.org/sbehighlights/>.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.  
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**Newsletter No. 029-04/05, April 22, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Public School Building Bonds - Semi-Annual Cash Zero-Out May 27, 2005:**

Our department is required to periodically zero-out the Public School Building Bond funds (PRC 078). We will be using the Life-to-date (LTD) draws versus the LTD expenditures reported in our system for the April 2005 reporting period, to calculate the dollar amount to be taken back from your local bank account. We will do this cash zero out for the funds requirement date (FRD) of May 27, 2005 (i.e., the date funds will be withdrawn from your designated bank account). We must receive any expenditure adjustments in our office by Friday, May 20, 2005, that should be posted prior to the Cash Zero-Out.

Please bring your expenditures up-to-date through the April 2005 reporting period (i.e., Life-to-date (LTD) cash drawn through April 2005 should equal LTD expenditures through April 2005). The effect of this zero-out process will be to align your LTD cash and LTD expenditures by project. If you have any questions about your allotment or project balance, or the zero out process, please contact Richard Smith at 919) 807-3729.

**(2) Please Use the NEW local PRCs:** In 2002 the NCASBO Blue Ribbon Chart of Accounts Committee recommended a standardized list of local PRCs. The use of the new PRCs was optional in FY 2002-2003. However, the new codes were mandated in FY 2003-2004.

It has come to DPI's attention that LEAs are continuing to use the old PRCs, which may impact your local per pupil numbers. In order to help LEAs identify if they are still using old PRCs, we added new verification messages to the MFR - Verification Messages Issued Report (PGA10RP4-V).

If you are still using the old PRCs, please do an AJE (adjusting journal entry) in your GL to move the expenditures and revenues to the correct code.



The local PRCs that were reassigned are:

- Impact Area Grants (Local Use) (used to be PRC 070) - Use PRC 308
- Head Start (Local Use) (used to be PRC 071) - Use PRC 309
- Smart Start Programs (Local Use) (used to be PRC 073) - Use PRCs 401 - 409
- Indian Education Act (Local Use) (used to be PRC 076) - Use PRC 310
- Medicaid Reimbursement for Health Related Services (Local Use) (used to be PRC 079) - Use PRC 306
- Before and After School Care Programs (Local Use) (used to be PRC 081) - Use PRC 701
- Community Schools (Local Use) (used to be PRC 082) - Use PRC 704

If you have any questions about your MFR error messages or verification messages, please email Richard Smith at [rismith@dpi.state.nc.us](mailto:rismith@dpi.state.nc.us).

**(3) Education Building Installs New Identification System:** On April 11, 2005, a new visitor ID system was installed in the lobby of the Education building. All visitors will be expected to show a valid driver's license or picture ID to enter the building. Visitors will then electronically sign in and receive a picture ID sticker to wear while in the building. Please be prepared for this security measure when you or your staff visits the Education building in Raleigh.

**FYI:** Kathy Horky will be leaving the Financial and Business Services Division of DPI. She has accepted a position in the Technology Services Division of DPI. You should direct your requests to [SystemsAccounting@dpi.state.nc.us](mailto:SystemsAccounting@dpi.state.nc.us). For BUD support you should call the help desk at 919.807.4357.

**FINANCIAL AND BUSINESS SERVICES SUMMER CONFERENCE:** On July 27-28, 2005, the Office of Financial and Business Services will conduct its annual conference at the Sheraton Imperial Hotel and Convention Center, Research Triangle Park. The conference will provide essential information about new and continuing financial and personnel policies that impact local education agencies and charter schools. More information will be available in the coming weeks. Should you have questions you may contact Doris McCain at [dmccain@dpi.state.nc.us](mailto:dmccain@dpi.state.nc.us) or 919.807.3700.

**New School Allotments Website:** The New School Allotment website at <http://www.ncpublicschools.org/fbs/schlbus/allotments/index.html> is now available. It has all of the FY 2005-06 State and Federal Planning Allotment information as well as other data that may be helpful.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.  
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**Newsletter No. 030-04/05, April 26, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

\*\*\*\*\*

**(1) Proposed Budget Comparisons:** A Planning, Governor & Senate Subcommittee Budget Comparison is available for your review on the Allotments website under "What's New" at <http://www.ncpublicschools.org/fbs/schlbus/allotments/index.html>

**(2) Federal Grants - 2004-2005 Application Due Dates and Contacts:** Attached is a list of federal programs with the due date for each project application to be received by the state program consultant for fiscal year 2004-2005. Budgets are to be received by the same date through BUD, or mailed with the application. This information has also been uploaded to the DPI website at <http://www.ncpublicschools.org/fbs/fedgrantduedates.html>

**(3) Transportation Budgets:** You are reminded to be very professional in the management of your transportation budgets. You may be aware that one of the LEAs is being investigated for the misuse of funds from this area and we want to be sure this is a unique event. So, please be sure that you are taking time to insure appropriate oversight in this area, especially in this time of escalating fuel and equipment costs. Questions, please call Ben Matthews, Director of School Support at 919-807-3501 or email him at [bmatthew@dpi.state.nc.us](mailto:bmatthew@dpi.state.nc.us).

**(4) Workers Compensation First Report of Injury-Form 19:** Most of you are aware of the enormous cost associated with our workers compensation claims and the administration of this program. Recently, we have been advised that about 54% of our school systems have been utilizing the Key Risk First Report of Injury submission available on the Internet at [www.keyrisk.com](http://www.keyrisk.com).

You will find that submitting First Report of Injury (FR-19) claims electronically will save you time. The claim will electronically register with the Key Risk adjuster and submission in this format will save DPI money. Key Risk currently charges DPI \$25.00 for First Response of Injury claims faxed or mailed to them. Reports submitted online

are not charged to our account. Consequently, I urge you to take the time to discuss this matter with your workers' compensation administrator or the individual responsible for filing workers' compensation claims with Key Risk and request that First Report of Injury claims are submitted electronically. With questions on how to submit claims electronically please contact Key Risk or Eileen Townsend, Section Chief, DPI at (919) 807-3522 or [etownsen@dpi.state.nc.us](mailto:etownsen@dpi.state.nc.us).

**(5) Low Interest Loans for Schools for Capital Improvements that Conserve Energy:** The State Energy Office announced that it has some low interest loans - up to \$500,000 - available to schools for capital improvements that conserve energy. If you are interested, contact Rondra McMillan at the State Energy Office. Phone 919-733-1919 or email her at [rondra.mcmillan@ncmail.net](mailto:rondra.mcmillan@ncmail.net)

**FYI:**

Governor Mike Easley has officially proclaimed the week of May 1-8 to be **School Bus Driver Appreciation week**. You can download a copy of the proclamation from [www.ncbussafety.org](http://www.ncbussafety.org) under "What's New".

Kathy Horky will be leaving the Financial and Business Services Division of DPI. She has accepted a position in the Technology Services Division of DPI. You should direct your requests to [Systems\\_Accounting@dpi.state.nc.us](mailto:Systems_Accounting@dpi.state.nc.us). For BUD support you should call the help desk at 919.807.4357.

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**Attachment:** To get the attachment referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachment to send.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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**Newsletter No. 031-04/05, May 10, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) ABC Transfers:** The last day to submit ABC transfers for FY 2004-05 is May 27, 2005. Please review your records and make sure that all of the submitted ABC Transfers have been processed for your LEA. If you have any questions, please contact Mike Thompson in the School Allotments Section at (919) 807-3732. Our last regular allotment revision will be uploaded on MSA on June 15, 2005. Allotment reports will be available for printing on June 17, 2005. Continue to check your AS 400 on Fridays for year-end clean-up revisions.

**(2) School Technology Fines and Forfeitures:** Fines and Forfeitures sent to the Department of Education for distribution into the School Technology Fund (PRC 015) will be distributed to LEAs and Charters by the School Allotments Section effective July 1, 2005. The Charter School's allotment will be a part of the Charter School funds (PRC 036) and will not carryover.

Allotments for Fines and Forfeitures are made monthly except for June due to closeout. The May, 05 and June, 05 Fines and Forfeitures will be allotted in the FY 2005-06 and will be a part of this new calculation. If you have any questions, please call School Allotments at (919) 807-3718.

**(3) Eckerd Youth Alternative Invoice - Reminder:** The invoice for the 4th quarter for Eckerd Youth Alternative is still coming for this fiscal year. Please make sure you Budget for this invoice from FY 2004-05 funds. A quick turnaround time for this invoice will be needed due to closeout. Please call Karen Peng, School Allotments, if you have questions at (919) 807-3750.

**(4) Impact of Proposed Budgets on LEAs - Budget Comparison:** These documents are posted on the FBS home page under "What's New". <http://www.ncpublicschools.org/fbs/>. Remember, you may have to click on refresh or reload in your web browser to get the updated page.

**(5) Workers' Compensation Forms:** The attached worker compensation documents are for LEA use in preparing bid specs or requesting quotes from local agents for workers' compensation coverage. Attachment 1 requires information to be completed by the LEA. Please include loss data and payroll information on noted attachment. Attachment 2 can be used by vendors providing workers' compensation quotes to LEA's. Please call Eileen Townsend, (919) 807-3522 with any questions.

**(6) Public School Building Bonds - Semi-Annual Cash Zero-Out May 27, 2005:** Our department is required to periodically zero-out the Public School Building Bond funds (PRC 078). We will be using the Life-to-date (LTD) draws versus the LTD expenditures reported in our system for the April 2005 reporting period, to calculate the dollar amount to be taken back from your local bank account. We will do this cash zero out for the funds requirement date (FRD) of May 27, 2005 (i.e., the date funds will be withdrawn from your designated bank account). We must receive any expenditure adjustments in our office by Friday, May 20, 2005, that should be posted prior to the Cash Zero-Out.

Please bring your expenditures up-to-date through the April 2005 reporting period (i.e., Life-to-date (LTD) cash drawn through April 2005 should equal LTD expenditures through April 2005). The effect of this zero-out process will be to align your LTD cash and LTD expenditures by project. If you have any questions about your allotment or project balance, or the zero out process, please contact Richard Smith at (919) 807-3729.

**(7) 2004-05 High School Graduate Survey:** The 2004-05 High School Graduate Survey is designed to collect the names and intentions of high school graduates. Users of the postgraduate intentions data include the state university system, the Employment Security Commission, the N. C. Department of Community Colleges, military recruiters, researchers, and many other agencies and individuals. Survey totals for each LEA and the state are published each year in the North Carolina Public Schools Statistical Profile. The lists of graduates' names are preserved in the State Archives, and occasionally have become the only existing record of an individual's graduation. All schools with 2005 graduates or 2004 summer school graduates must complete this survey. The survey, with instructions, can be found online at <http://www.ncpublicschools.org/fbs/> under "What's New." All results must be received by June 28.

**(8) Fiscal Year 2004-2005 Cash Close Out Procedures for Public School Building Bond Funds:** Attached for your information is the Memorandum dated May 6, 2005 previously sent to LEA Finance Officers and County Finance Officers pertaining to the cash close out procedures for Public School Building Bond Funds.

**FYI:**

**State Board Meeting Highlights:** The Board approved new high school exit standards effective with the ninth grade class of 2006-07 (graduating class of 2010). The new standards require students to pass the five core end-of-course tests and successfully complete a senior project. Also, the Board approved a new formula for the ABCs accountability model, a result of the comprehensive review of the ABCs that began last fall. Complete highlights of the Board meeting will be posted online by Wednesday morning at <http://www.ncpublicschools.org/sbehighlights/>.

**Bill Status Report:** A Bill Status Report of all education-related bills that have been filed in the General Assembly is attached.

**Name Change:** Christal McCall in the School Allotments Section of Financial and Business Services at DPI was married April 9, 2005. She is now Christal Kelly. Christal handles the Children with Special Needs state and federal allotments. Her new email address is [ckelly@dpi.state.nc.us](mailto:ckelly@dpi.state.nc.us).

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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**Newsletter No. 032-04/05, May 17, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Please Verify Your BUD Transactions:** DPI took their AS/400 down on Friday, May 6 at 4:00 p.m. to do an upgrade. If you sent any BUD items (adjustments/202s, federal budgets or federal amendments) between 4:00 p.m., Friday, May 6 and 9:00 a.m., Monday, May 9, there is a good chance that DPI did not get your file(s). Please make sure that you receive communication forms back on all BUD transactions transmitted to DPI.

Please contact the Customer Support Center via phone - 919-807-4357 or E-Mail - [help@dpi.state.nc.us](mailto:help@dpi.state.nc.us) if you need assistance in verifying whether or not DPI received your BUD file(s).

**(2) Indirect Cost Rates for FY 2005-06:** Indirect cost rates for 2005-06 will be netviewed on Wednesday, May 18, 2005. You will access your indirect cost reports just as you do your month-end reports from DPI. Charter Schools should look for FI045A and FI045B files. Please note that this is the only notification you will receive regarding your indirect cost rates for FY 2005-06.

These rates are for use in the fiscal year beginning July 1, 2005. The restricted rate can be applied against all grants operating with "supplement but not supplant" restrictions in the regulations.

Charter Schools that have no data in their file should contact Stephanie English (919-807-3686) in the Monitoring & Compliance Section to obtain their indirect cost rates.

If you have questions regarding these rates, please contact Stephanie at the number shown above.

**(3) REMINDER - School Closings Survey:** All LEAs and Charter Schools are required to complete the School Closings Survey for school year 2004-05. Please complete the on line survey and submit by May 19, 2005. The survey can be found on the Financial Business Services website at <http://www.ncpublicschools.org/fbs> under "What's New". If you have questions about the survey, please contact Kendall Jordan at [kjordan@dpi.state.nc.us](mailto:kjordan@dpi.state.nc.us) or 919-807-3721.



**(4) 2004-05 High School Graduate Survey:** Please forward to appropriate person - The graduate survey is designed to collect the names and intentions of high school graduates. Users of the postgraduate intentions data include the state university system, the Employment Security Commission, the N. C. Department of Community Colleges, military recruiters, researchers, and many other agencies and individuals. Survey totals for each LEA and the state are published each year in the North Carolina Public Schools Statistical Profile. The lists of graduates' names are preserved in the State Archives, and occasionally have become the only existing record of an individual's graduation.

This survey must be completed by all schools with 2005 graduates or 2004 summer school graduates. The survey with instructions can be found on the website at <http://www.ncpublicschools.org/fbs/> under "What's New". All results must be received by June 28th. Should you have questions contact Alexis Schauss at [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(5) Unemployment Benefits and NCLB Requirements for Paraprofessionals:** Please review attachment regarding unemployment benefits and NCLB requirements for paraprofessionals. Forward this information to personnel directors and individuals within your school system involved with unemployment issues. Please contact Eileen Townsend at (919) 807-3522 or [etownsen@dpi.state.nc.us](mailto:etownsen@dpi.state.nc.us) with any questions.

**(6) Financial and Business Services Summer Conference:** On July 27-28, 2005, the Office of Financial and Business Services will conduct its annual conference at the Sheraton Imperial Hotel and Convention Center, Research Triangle Park. The conference will provide essential information about new and continuing financial and personnel policies that impact local education agencies and charter schools. Conference, registration, and hotel information is available on our web site at [www.ncpublicschools.org/fbs/](http://www.ncpublicschools.org/fbs/). If you have questions regarding the conference, please contact Paul LeSieur or Doris McCain at 919-807-3700.

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**Newsletter No. 033-04/05, May 24, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) ABC Transfers:** The last day to submit ABC transfers for FY 2004-05 is May 27, 2005. Please review your records and make sure that all of the submitted ABC Transfers have been processed for your LEA. If you have any questions, please contact Mike Thompson in the School Allotments Section at (919) 807-3732.

**(2) Eckerd Youth Alternative Invoice - Reminder:** The invoice for the 4th quarter for Eckerd Youth Alternative will be emailed to you the week of June 6, 2005. Please make sure you budget for this invoice from FY 2004-05 funds. A quick turnaround time for this invoice will be needed due to closeout. Please call Karen Peng, School Allotments, if you have questions at (919) 807-3750.

**(3) Year-End Close-Out and Invalid Account Codes:** It is getting near year-end close-out time. Time to clean-up any remaining errors on the MFR data. There are still many LEAs who are reporting invalid account codes in their monthly financial data. Your financial software edits the expenditure accounts at the point of data entry. You set your system parameters to give either a "Warning" or an "Error" when an invalid code is used. Please notify your staff that the "Warning" should not be ignored. Using invalid codes causes you problems with your datafile posting and with your MFR reporting. You should download updated files from the BUD System weekly to ensure that you have the most current information.

DPI sends each month, via netview, an "MFR Error Messages" report (PGA10RP4-E) listing any errors detected in your MFR data, usually transactions from your general ledger that are recorded to invalid codes; and a Monitoring Letter listing any expenditures submitted through datafile to invalid codes, with the valid codes where DPI posted the expenditures. If you disagree with the code used by DPI to post the datafile expenditure, then you must submit a UTR in the BUD system, moving the expenditure FROM the valid code that DPI used TO the valid code that you choose. If you have any questions about the invalid code information on the Monitoring Letter or valid account codes, please contact Richard Smith at 919-807-3729 or [rsmith@dpi.state.nc.us](mailto:rsmith@dpi.state.nc.us). If you have any questions about errors on the MFR data, please contact Jenny Billings at 919-807-3725; or Richard Smith at 919-807-3729.

**(4) REMINDER - School Closings Survey:** All LEAs and Charter Schools are required to complete the School Closings Survey for school year 2004-05. Please complete the on line survey and submit by May 19, 2005. The survey can be found on the Financial Business Services website at <http://www.ncpublicschools.org/fbs> under "What's New". If you have questions about the survey, please contact Kendall Jordan at [kjordan@dpi.state.nc.us](mailto:kjordan@dpi.state.nc.us) or 919-807-3721.

**(5) Reminder: Please Verify Your BUD Transactions:** DPI took their AS/400 down on Friday, May 6 at 4:00 p.m. to do an upgrade. If you sent any BUD items (adjustments/202s, federal budgets or federal amendments) between 4:00 p.m., Friday, May 6 and 9:00 a.m., Monday, May 9, there is a good chance that DPI did not get your file(s). Please make sure that you receive communication forms back on all BUD transactions transmitted to DPI.

Please contact the Customer Support Center via phone - 919-807-4357 or E-Mail - [help@dpi.state.nc.us](mailto:help@dpi.state.nc.us) if you need assistance in verifying whether or not DPI received your BUD file(s).

**(6) Reminder: 2004-05 High School Graduate Survey:** (Please forward to appropriate person) The graduate survey is designed to collect the names and intentions of high school graduates. Users of the postgraduate intentions data include the state university system, the Employment Security Commission, the N. C. Department of Community Colleges, military recruiters, researchers, and many other agencies and individuals. Survey totals for each LEA and the state are published each year in the North Carolina Public Schools Statistical Profile. The lists of graduates' names are preserved in the State Archives, and occasionally have become the only existing record of an individual's graduation.

This survey must be completed by all schools with 2005 graduates or 2004 summer school graduates. The survey with instructions can be found on the website at <http://www.ncpublicschools.org/fbs/> under "What's New". All results must be received by June 28th. Should you have questions contact Alexis Schauss at [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(7) Financial and Business Services Summer Conference:** On July 27-28, 2005, the Office of Financial and Business Services will conduct its annual conference at the Sheraton Imperial Hotel and Convention Center, Research Triangle Park. Conference, registration, and hotel information is available on our web site at [www.ncpublicschools.org/fbs/](http://www.ncpublicschools.org/fbs/). If you have questions regarding the conference, please contact Paul LeSieur or Doris McCain at 919-807-3700.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.  
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**Newsletter No. 034-04/05, June 15, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Please Verify Your BUD Transactions:** SIPS had line problems on Monday, June 13. If you sent any BUD items (adjustments/202s, federal budgets or federal amendments), there is a chance that DPI did not get your file(s). Please make sure that you receive communication forms back on all BUD transactions transmitted to DPI.

Please contact the Customer Support Center via phone – (919) 807-4357 or email - [help@dpi.state.nc.us](mailto:help@dpi.state.nc.us) if you need assistance in verifying whether or not DPI received your BUD file(s).

**(2) AS/400 OPERATIONS REMINDERS:** To ensure your AS/400 communication lines are working and your distribution lines are clear, please do the following commands **at least daily:**

- Type: **WRKSBS** on an AS/400 command line, press <ENTER>  
Check QSNADS subsystem to make sure it is active. If QDSNX is listed, the subsystem is active. Transfers of network file to/from your system will **NOT** work unless this subsystem is active.
- Type: **WRKDSTQ** on an AS/400 command line, press <ENTER>.  
For any queue not having a status of Waiting, type 3 (Hold Queue) in the option column and press <ENTER>. Then, type 6 (Release Queue) in the option column and press <ENTER>. If the status goes to Rty-Fail, please call the Customer Support Center (919-807-4357) at DPI for assistance.
- Type: **WRKCFGSTS \*LIN SIPS\*** on an AS/400 command line, press <ENTER>.  
Check that status is ACTIVE for SIPSAS4001, SIPS400CTL and SIPSDSX01

Verifying the lines are up and available and your distribution queue is clear will help DPI access your files and will help minimize calls from DPI at year-end. Please contact the Customer Support Center via phone – (919) 807-4357 or email - [help@dpi.state.nc.us](mailto:help@dpi.state.nc.us) if you need assistance with the above commands.

**(3) Please Use the NEW local PRCs:** In 2002 the NCASBO Blue Ribbon Chart of Accounts Committee recommended a standardized list of local PRCs. The use of the new PRCs was optional in FY 2002-2003. However, the new codes were mandated in FY 2003-2004.

It has come to DPI's attention that LEAs are continuing to use the old PRCs, which may impact your local per pupil numbers. In order to help LEAs identify if they are still using old PRCs, we added new verification messages to the MFR - Verification Messages Issued Report (PGA10RP4-V).

If you are still using the old PRCs, please do an AJE (adjusting journal entry) in your GL to move the expenditures and revenues to the correct code.

The local PRCs that were reassigned are:

- State Textbooks (Local Use) (used to be PRC 061) - **Use PRC 130**
- Impact Area Grants (Local Use) (used to be PRC 070) - **Use PRC 308**
- Head Start (Local Use) (used to be PRC 071) - **Use PRC 309**
- Smart Start Programs (Local Use) (used to be PRC 073) - **Use PRCs 401 - 409**
- Indian Education Act (Local Use) (used to be PRC 076) - **Use PRC 310**
- Medicaid Reimbursement for Health Related Services (Local Use) (used to be PRC 079) - **PRC Use 306**
- Before and After School Care Programs (Local Use) (used to be PRC 081) - **Use PRC 701**
- Community Schools (Local Use) (used to be PRC 082) - **Use PRC 704**

If you have any questions about your MFR error messages or verification messages, please email Richard Smith at [rsmith@dpi.state.nc.us](mailto:rsmith@dpi.state.nc.us).

**(4) Allotment Revisions:** Please remember to print a copy of Allotment Revision 24 from your AS400 because it will be replaced by Allotment Revision 25 on Friday, June 17, 2005. Please call School Allotments at (919) 807-3739 if you have questions.

**(5) Abstinence Grant- FY 2004-05:** We have finally received the approved contract for the FY 2004-05 Abstinence funds. These funds will be allotted to all LEAs with approvals in Allotment Revision 25 that is being processed today, June 15, 2005. The Allotment Revision report will be available for printing on June 17, 2005. These funds will rollover in BUD and can be budgeted as carryover in FY 05-06. Please contact Karen Peng at (919) 807-3750 if you have questions concerning the allotments.

**(6) Federal Reversion Warning:** On May 13, 2005, Superintendents and Finance Officers were notified of any federal funds your LEA might revert for the federal grants ending on June 30, 2005. Please remember that funds must be spent by June 30, 2005 for Vocational Education Program Improvement (PRC 017), Vocational Tech Prep (PRC 023), Learn and Serve (PRC 064), and Title IV - 21st Century Community Learning Centers (PRC 110). Please contact Monique Johnson, School Allotments, at (919) 807-3684 if you have questions.

**(7) Eckerd Youth Camp:** Payment for the 4th quarter Eckerd Youth Camp invoice and any prior month adjustments is due today June 15, 2005. Please make sure that the check has been written and sent to DPI. If your payment is not received by June 20, 2005, your At-Risk allotment will be reduced in a clean-up revision prior to the end of the fiscal year. If you have questions, please contact Karen Peng, School Allotments, (919) 807-3750.

**(8) Salary Administration Staffing:** Please be aware that due to an unexpected illness we have only one salary analyst, Marie Houston, in the Information Analysis Section. We understand that as the year end comes near the LEAs have increasing needs in the salary area and we are temporarily realigning staff to try and accommodate the needs. Please be patient as we try and provide the service to which you have become accustomed.

\*\*\*\*\*  
To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.  
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## **BUD Year End Information:**

1. Starting June 13 until July 1, we will receive and process the BUD adjustment/202 batches at 1:00 PM and 8:00 PM each day. If you send an adjustment batch by 1:00 PM, you can conceivably receive your communication form back that same afternoon. Hopefully, this change will allow LEAs more time to correct denied batches. **Please be sure and receive your files daily if you know that you have sent BUD batches to DPI for processing.**
2. You may send BUD 202's to DPI until midnight on July 1, 2004 for FY 2005 batches. However because July 2 is a Saturday, and we know that you do not want to be in the office on Saturday while we check your distribution queues, **it would be helpful if you can get your BUD batches to DPI by 3:00 PM.** If you need to send BUD batches after 3:00 PM, please E-Mail [Systems\\_Accounting@dpi.state.nc.us](mailto:Systems_Accounting@dpi.state.nc.us), so we can verify that we do have your batches to process. We will not be able to process "lost" batches after we are closed.
3. For your salary corrections, please keep BUD 202 information for July-May voucher dates in separate batches from June voucher corrections/refunds. This will help you get your information processed quicker. **Remember that we cannot process BUD batches with June voucher dates until we get your June data on July 1.**
4. We recommend that you keep your adjustment batches small.
5. Please remember the salary system cannot process multiple changes to a voucher on the same day. You must wait for one change to clear before submitting another change to that same voucher. The exception to this will be your June vouchers since we will process all June voucher changes in one day on July 2.
6. Starting July 1, the BUD system will default Year Ending June 30, **2006** in the adjustment batches. In order to avoid this, you will need to change the Year Ending date to **2005 on the menu (AUMU) BEFORE** creating a new batch for FY 2005.
7. We are sending BUD communication forms back to you daily, including the Federal budgets/amendments. Please receive and review your 202 batch communication forms daily to ensure that we did process your 202 batches and did not reject them. You must correct rejected batches and send the corrected batches back to DPI by July 1.

Please contact [Systems\\_Accounting@dpi.state.nc.us](mailto:Systems_Accounting@dpi.state.nc.us) if you have any questions regarding BUD processing for year end.

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**Newsletter No. 035-04/05, June 23, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

\*\*\*\*\*

**(1) Matching Retirement Rate:** With the July 1st accrual submission deadline looming, and the House (**6.82%**) and Senate (**6.83%**) budget recommendations for matching retirement being different, DPI is recommending that the LEAs use the Senate's higher rate of **6.83%** as the matching retirement rate for the 11th and 12th Installment accruals. We are making this recommendation to help prevent over expended allotments from occurring after June 30th when Installments are posted and the Accruals are reversed. This is an option that the LEAs may choose to use to avoid possible refunds if the higher Senate rate is adopted in the conference committee. We will keep you posted, and notify you of the final rate once negotiated. If you have questions contact Paul LeSieur at 919.807.3700, [plesieur@dpi.state.nc.us](mailto:plesieur@dpi.state.nc.us) or Alexis Schauss at 919.807.3708, [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(2) Reminder to Monitor Administration Expenditures:** Five Federal PRCs [Vocational Education (017), Safe & Drug Free Schools (048), Title I (050), Language Acquisition (104) and Reading First (106)] have administration expenditure limitations. These limitations are monitored at June 30. In addition, indirect cost charged to federal programs is compared against your approved rate. If administrative expenditures and/or indirect cost charges exceed allowable amounts, you may be subject to an audit exception by your independent auditors. Please contact Margaret Wall (919-807-3682 or [mwall@dpi.state.nc.us](mailto:mwall@dpi.state.nc.us)) or Stephanie English (919-807-3686 or [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us)) in the Monitoring & Compliance Section if you have questions.

**(3) Datafile Transmission Reminder:** In order to ensure that we receive all of the installment accruals with the June datafile transmission, and to prevent us unnecessarily contacting those of you who will have no accruals, we are requesting your help.

If you do not pay your employees on traditional installments, and therefore will not have installment accruals, please email Ally Barfield at [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us) no later than close of business on June 28th. Simply put "No accruals - LEA (plus your three digit LEA number)" in the subject line. We appreciate your help!



**(4) Monthly Reports for June:** Please remember that transmission of your monthly June expenditure data, MFR, retirement and accrual files will commence at 12:01 a.m. July 1st. Please make sure that your communication lines are available for this transmission.

You will receive a confirmation email from us once DPI receives all of your expected files. It is imperative that someone be on site on the morning of July 1 to receive this confirmation, as we will also be contacting those LEAs whose data we have not received.

Please note that although your system may indicate that a transmission has occurred, it may not actually reach our systems. If your data has not been received, someone will need to be on site until the files are received.

Help us to close out your fiscal year!

**(5) IMPACT OF PROPOSED BUDGETS ON LEAs:** How is your LEA's planning allotment affected by the budgets proposed by the Governor, Senate and House? Go to the Financial and Business Services website at [www.ncpublicschools.org/fbs/](http://www.ncpublicschools.org/fbs/) under "What's New" and click on the link to bring up the Excel spreadsheet. Then simply type in your LEA number and you can review the planning allotment for 2005-2006 along with how those planning allotments are impacted by the budgets proposed by the Governor, the Senate and the House. This information does not reflect proposed salary or benefit adjustments. It also does not reflect allotments for Improving Student Accountability and ABC Incentive Awards since those funds are distributed based on test scores which are not yet finalized. If you have any problems, contact the School Allotments Section at (919) 807-3739.

**(6) 2005-06 LOW WEALTH AND SMALL COUNTY PLANNING ALLOTMENTS or LOW WEALTH FORMULA CALCULATIONS:** To see your Low Wealth and/or Small County planning allotments or Low Wealth formula calculation, go to the Financial and Business Services website at [www.ncpublicschools.org/fbs/](http://www.ncpublicschools.org/fbs/) under "What's New" and click on the link to bring up the Excel spreadsheet. Then simply type in your LEA number and you can review the planning allotment for 2005-2006. This information does not reflect proposed salary or benefit adjustments. If you have any problems, contact the School Allotments Section at (919) 807-3739.



**(7) Please Verify Your BUD Transactions:** SIPS had line problems on Monday, June 13. If you sent any BUD items (adjustments/202s, federal budgets or federal amendments), there is a chance that DPI did not get your file(s). Please make sure that you receive communication forms back on all BUD transactions transmitted to DPI.

Please contact the Customer Support Center via phone - 919-807-4357 or E-Mail - [help@dpi.state.nc.us](mailto:help@dpi.state.nc.us) if you need assistance in verifying whether or not DPI received your BUD file(s).

**(8) AS/400 OPERATIONS REMINDERS:** To ensure your AS/400 communication lines are working and your distribution lines are clear, please do the following commands **at least daily:**

\*\*\*Type: **WRKSBS** on an AS/400 command line, press <ENTER>  
Check QSNADS subsystem to make sure it is active. If QDSNX is listed, the subsystem is active. Transfers of network file to/from your system will **NOT** work unless this subsystem is active.

\*\*\*Type: **WRKDSTQ** on an AS/400 command line, press <ENTER>.  
For any queue not having a status of Waiting, type 3 (Hold Queue) in the option column and press <ENTER>. Then, type 6 (Release Queue) in the option column and press <ENTER>. If the status goes to Rty-Fail, please call the Customer Support Center (919-807-4357) at DPI for assistance.

\*\*\*Type: **WRKCFGSTS \*LIN SIPS\*** on an AS/400 command line, press <ENTER>.  
Check that status is ACTIVE for SIPSAS4001, SIPS400CTL and SIPSDSX01

Verifying the lines are up and available and your distribution queue is clear will help DPI access your files and will help minimize calls from DPI at year-end. Please contact the Customer Support Center via phone - 919-807-4357 or E-Mail - [help@dpi.state.nc.us](mailto:help@dpi.state.nc.us) if you need assistance with the above commands.

**(9) Reminder - Please Use the NEW local PRCs:** In 2002 the NCASBO Blue Ribbon Chart of Accounts Committee recommended a standardized list of local PRCs. The use of the new PRCs was optional in FY 2002-2003. However, the new codes were mandated in FY 2003-2004.

It has come to DPI's attention that LEAs are continuing to use the old PRCs, which may impact your local per pupil numbers. In order to help LEAs identify if they are still using old PRCs, we added new verification messages to the MFR - Verification Messages Issued Report (PGA10RP4-V).

If you are still using the old PRCs, please do an AJE (adjusting journal entry) in your GL to move the expenditures and revenues to the correct code.

The local PRCs that were reassigned are:

State Textbooks (Local Use) (used to be PRC 061) - **Use PRC 130**

Impact Area Grants (Local Use) (used to be PRC 070) - **Use PRC 308**

Head Start (Local Use) (used to be PRC 071) - **Use PRC 309**

Smart Start Programs (Local Use) (used to be PRC 073) - **Use PRCs 401 - 409**

Indian Education Act (Local Use) (used to be PRC 076) - **Use PRC 310**

Medicaid Reimbursement for Health Related Services (Local Use) (used to be PRC 079)  
- **Use PRC 306**

Before and After School Care Programs (Local Use) (used to be PRC 081) - **Use PRC 701**

Community Schools (Local Use) (used to be PRC 082) - **Use PRC 704**

If you have any questions about your MFR error messages or verification messages, please E-Mail Richard Smith at [rismith@dpi.state.nc.us](mailto:rismith@dpi.state.nc.us).

\*\*\*\*\*

**Attachment:** To get the attachment referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachment to send.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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**Newsletter No. 001-05/06, July 6, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

\*\*\*\*\*

**(1) Travel Subsistence Rate Revision Effective July 1, 2005:** Effective July 1, 2005, the subsistence reimbursement will be increased. Attached is a memorandum from David McCoy, Office of State Budget and Management which list the changed rates of subsistence per day for travel related expenses for In-State and Out-of-State. The changes are as follows:

|                                | <b>In-State</b> | <b>Out-of-State</b> |
|--------------------------------|-----------------|---------------------|
| <b>Breakfast</b>               | <b>\$ 7.00</b>  | <b>\$ 7.00</b>      |
| <b>Lunch</b>                   | <b>\$ 9.25</b>  | <b>\$ 9.25</b>      |
| <b>Dinner</b>                  | <b>\$ 15.75</b> | <b>\$ 17.75</b>     |
| <b>Lodging (actual, up to)</b> | <b>\$ 59.75</b> | <b>\$ 71.00</b>     |
|                                |                 |                     |
| <b>Total</b>                   | <b>\$ 91.75</b> | <b>\$105.00</b>     |

**(2) Small County FY 05-06 Planning Allotments:** The Small County FY 05-06 Planning Allotments have been revised to reflect amounts calculated by the formula and will be posted to the web this week. The original Small County Planning Allotment was overstated. We apologize for any inconvenience. Please contact Karen Peng in the School Allotment Section at (919) 807 - 3750 if you have any questions.

**(3) Clean-up Allotment Revisions:** Allotment Revision 26 is available for printing from the AS 400. This is the first of our year-end clean-up revisions and it only affected 3 LEAs and one Charter School. Allotment Revision 27 also for clean-up will upload on Wednesday, July 6, 2005 and will be available for printing on Friday, July 8, 2005. This revision will affect 2 LEAs. Every LEA and Charter School was sent Allotment Revision 26 and will be sent Allotment Revision 27. Only these few LEAs will have changes and they have been in contact with us. Please contact Mike Thompson in the School Allotments Section at (919) 807 - 3732 if you have questions.

**(5) 2005 FBS Summer Conference - Sheraton Imperial Hotel, July 27 & 28:**

Conference Registration has been extended to July 15 at 5:00 PM. The conference registration fee per participant is \$80.00. After July 15, the registration fee per participant will be \$95.00. You will be able to register on-site at the fee of \$95.00 per participant as well. If you must register on-site, please bring cash or check to pay the fees. If you have questions about the conference call Doris McCain at 919.807.3700.

\*\*\*\*\*

**Attachment:** To get the attachment referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachment to send.

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**Newsletter No. 002-05/06, July 15, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

\*\*\*\*\*

**(1) Clarification of the Continuing Resolution message sent to Finance Officers on Friday July 5, 2005.**

Unfortunately, some information in our previous communication related to the continuing resolution is being misinterpreted. We would like to make sure we clarify a few items:

- LEAs may fill vacancies. There is no restriction on hiring at the LEA level.
- LEAs should be cautious when filling positions if there is a difference in the Senate and House budgets or if the budgets have reductions outlined on the comparisons sent out previously (we have attached a document reflecting agreed upon reductions and disagreed upon allotment adjustments). Use the "worst case" amount in planning at this time. (See next bullet to determine the lowest anticipated funding level)
- LEAs can count on the funding received in their Planning Allotments if the Senate and House budgets reflect no change in the funding levels. Refer to the following web address to view the changes based on the Senate or House budget.  
[http://www.ncpublicschools.org/fbs/schlbus/allotments/whatnew\\_budgetcomparison.xls](http://www.ncpublicschools.org/fbs/schlbus/allotments/whatnew_budgetcomparison.xls)
- It is important to remember that the House Budget does not eliminate the discretionary reduction. Therefore, you will need to be prepared to return a portion of your allotment to eliminate this possible reduction.

**To better understand the explanations below, see the attached document (Agreed Upon Reductions and Disagreed Upon Allotment Adjustments) reflecting items agreed to and disagreed to in the Senate and House budgets.**

- If an allotment category has no change from Planning to Senate or House budgets on the Budget Comparison worksheet, located under the "What's New" section of the FBS website, then there will be no change to funding level and the planning allotment can be used as expected funding.
- If the Senate and House agreed to increases or decreases in the budgets on the Budget Comparison worksheet, located under the "What's New" section of the FBS website, then the amounts reflected on the budget comparison can be used for planning.

- If the Senate and House disagree on amounts to increase or decrease on the Budget Comparison worksheet, located under the "What's New" section of the FBS website, then use the "worst case" amount on the budget comparison can be used for planning.

**Compare your FY 2004-05 funding levels on your final allotment revision worksheet to the lowest possible funding level at the website above.**

- This will give you an indication of how you should proceed in planning at this time and the ability to fill your vacancies.
- You control your budgets and can determine the best way to plan your hiring and spending for the 2005-06 school year.
- The only restriction we suggest is you use the "worst case" cut by either the Senate or House. That could be your allotment for the 2005-06 school year.
- We have made these documents available to you to ensure you have the best possible information to make decision for your school system.
- It is important to remember that the House Budget does not eliminate the discretionary reduction. Therefore, you will need to be prepared to return a portion of your allotment to eliminate this possible reduction.

**(2) NOTICE: Employer Matching Retirement Rate:** Per the Retirement system, the legal employer matching retirement rate is still 5.815%. Regardless of the matching rate used to produce the DPI Accrual file, any actual payrolls run prior to the passing of the budget must still be matched at the existing 5.815% rate. Once the budget is passed, you will receive additional information from DPI and/or the Retirement System on any adjustments that might be necessary. If you have questions contact Paul LeSieur at 919.807.3700, [plesieur@dpi.state.nc.us](mailto:plesieur@dpi.state.nc.us) or Alexis Schauss at 919.807.3708, [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(3) June Reports Netviewed:** Please note that the June state and federal expenditure reports which were netviewed to you this week are referred to as our "Cash Closeout Reports". These reports represent only the regular June 2005 expenditures, and do not reflect installment accruals.

The installment accruals will be posted by next week, and June reports reflecting accruals will be netviewed to you at that time. Please be sure to print out all of your yearend reports.

**(4) Adjustment and Refund Processing:** Fiscal year 2004-05 processing as the current fiscal year has now been closed. When you are refunding or adjusting expenditures for FY 2004-05, you are required to use BUD and indicate that the adjustments are prior year adjustments. Submitting hard copy checks and/or paper

FPD 202 forms for this fiscal year are not necessary nor desired, unless specifically requested from you by a member of the Information Analysis and Reporting staff.

If you are making adjustments or refunds for exceptions remaining for FY 2003-04 fiscal year or earlier, you are required to submit hard copy checks and/or paper FPD 202 forms. The BUD system only recognizes one prior fiscal year at any given time.

The current fiscal year is now 2005-06 for all BUD processing. If you have questions contact Alexis Schauss at 919.807.3708 or [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(5) Annual Transportation Report Due:** Reminder: Transportation directors are aware that the "TD-1" annual transportation report for 2004-2005 is due to DPI Transportation Services by August 1. This important information is required in order to determine state transportation funding for 2005-2006. Finance Officer, Superintendent and Transportation Director signatures are required. If you have questions contact Derek Graham at 919.807.3571.

**(6) FY 2005 13th Month MFR Rescheduled:** Due to the time frame of the FBS Summer Conference, we are rescheduling the pick up of your 13th Month MFR data. DPI will access your preliminary 13th month MFR file on Monday night, July 25.

Please be sure to do the following before building the 13th Month MFR File:

- 1) Book the Period 12 zero-out entry to your GL in June (Period 12).
- 2) Correct all of your MFR errors, including local account codes.
- 3) Review the AFR/MFR Recommendations posted on the Financial and Business Services web page to ensure accurate reporting of your Per Pupil expenditures: <http://www.ncpublicschools.org/fbs/afr-mfr04.html>

Please email your MFR questions to:

Alexis Schauss - [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us)

Ally Barfield - [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us)

Richard Smith - [rismith@dpi.state.nc.us](mailto:rismith@dpi.state.nc.us)

**(7) Prior Year Allotment Overdrafts:** Please note that the dollar amount of the exception for overuse of months in any allotment category under the "Months Allocated Versus Months Used" area of this report is based on the statewide average salary for that allotment category. The amount you need to refund is based on the employee you choose to refund for the number of months over used.

**(8) Allotment Overdrafts:** Allotment overdrafts for FY 2004 are being downloaded to you today. Please note that if you still have remaining exceptions, they need to be refunded, along with the associated penalties as soon as possible. These

refunds must be done on manual 202 forms, and require a hard copy check to accompany them. BUD only recognizes one prior fiscal year in processing.

Allotment overdrafts for June, FY 2005 (which do not reflect your accruals) will be downloaded to you early next week. Any allotment overdrafts and/or associated penalties are to be handled through BUD, and marked as prior year batches. These overdrafts are to be handled as soon as possible.

We have run preliminary allotment overdraft reports based on your accrual information, and projected allotment overdrafts are quite large. When you make your installment payments, you need to be sure to process prior year BUD batches at the same time to cover any overages you may have as you go.

You are reminded that using State funds to pay for expenditures in excess of your resources is against State law. Please be sure that you are in compliance and covering any unauthorized usage immediately.

**(9) 2005 FBS Summer Conference - Sheraton Imperial Hotel, July 27 & 28:**

Conference Registration expires at 5:00 PM today. The conference registration fee per participant is \$80.00. After today the registration fee per participant will be \$95.00. You will be able to register on-site at the fee of \$95.00 per participant as well. If you must register on-site, please bring cash or check to pay the fees. Attached is the tentative schedule detailing each session for the Financial and Business Services Summer conference, July 27-28, 2005. **PLEASE NOTE: There has been a change -** Thursday's lunch has been replaced by a breakfast buffet which will be from 7:30 - 8:30 AM. If you have questions about the conference call Doris McCain at 919.807.3700.

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 003-05/06, August 2, 2005**

\*\*\*\*\*

Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

\*\*\*\*\*

**(1) July UERS Data pull to include MFR file:** The July UERS financial data pull is scheduled to kick off at 6:00 Wednesday night, August 3rd. Please have your July Financial, retirement and MFR files ready as well as your April - June ESC file. Note that DPI will now be picking up the MFR file with each financial pull. In the past DPI has not picked up the July - September MFR files but, at the request of many finance officers, DPI will now pick up and process the MFR data each month. If you have any questions please contact Richard Smith at 919-807-3729.

**(2) Work Force Development:** Effective August 15, 2005 the NCDPI Work Force Development Program has been renewed with Montgomery Insurance.

Coverage provided for this program includes:

General Liability

- Each Occurrence \$ 1,000,000
- Fire Damage \$ 50,000
- Medical Expense (any one student) \$ 15,000
- Personal and Advertising Injury \$ 1,000,000
- Health Students Professional \$ 1,000,000
- Products and Completed Operations \$ 1,000,000
- General Aggregate \$ 3,000,000

Teachers performing within the scope of their duties will be covered under workers' compensation for accidents or injuries.

Renewal rates on this program have been reduced as follows.

Students participation in Work Force Development programs

|                   |                              |
|-------------------|------------------------------|
| 1-10 days         | \$ 0.34 (expiring \$ 0.50)   |
| 11 or more days   | \$ 17.40 (expiring \$ 25.00) |
| Health Occupation | \$ 10.44 (expiring \$ 17.00) |

There is no Administrative Fee of \$ 50.00.

Please complete the attached Work Force Development Invoice and follow instructions on the form for mailing your enrollment numbers and check to Moore and Johnson Agency.

Contact Eileen Townsend if you have any questions at (919) 807-3522 or [etownsen@dpi.state.nc.us](mailto:etownsen@dpi.state.nc.us).

**(3) Sales Tax Holiday Scheduled for Aug. 5-7** - The Department of Revenue is sponsoring a Sales Tax Holiday whereby certain items sold between 12:01 a.m. on Friday, Aug. 5, through 11:59 p.m. on Sunday, Aug. 8, will be exempt from sales tax. Clothing, footwear, and school supplies of \$100 or less per item; sports and recreation equipment of \$50 or less per item; and computers of \$3,500 or less per item will be exempt. For full details, please go to the Department of Revenue's Web site at [http://www.dor.state.nc.us/taxes/sales/salestax\\_holiday.html](http://www.dor.state.nc.us/taxes/sales/salestax_holiday.html).

**(4) STATE BOARD TO MEET:** The State Board of Education will meet Wednesday and Thursday, Aug. 3-4, 2005, in the 7th Floor Board Room, Education Building, 301 N. Wilmington Street, Raleigh. During Wednesday's Issues Session, Board members will view a video presentation, "Thomas L. Friedman Reporting: Searching for the Roots of 9/11," and receive updates on various high school reform initiatives. Items up for action by Board members include the 2004-05 ABCs/AYP Report and 2005-06 Assistance Program (Thursday presentation), approval of a policy delineating the test development process for the North Carolina Writing Assessment, supplemental education service providers for 2005-06, disadvantaged student supplemental funding program for 2005-06, and recommendations for preliminary approval of 2005 Charter School applications. Discussion items include a policy delineating use of end-of-course tests for accountability. In addition, a number of special recognitions will occur on Thursday morning as new Board members are sworn in, incoming State Board advisors are recognized and Senior Project State Board of Education awards are presented. To view the complete agenda, please go online to [http://www.ncpublicschools.org/sbe\\_meetings/index.html](http://www.ncpublicschools.org/sbe_meetings/index.html) and click on the appropriate link.

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**Attachment:** To get the attachment referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachment to send.  
\*\*\*\*\*  
To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.  
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**Newsletter No. 004-05/06, August 12, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) 05/06 BUDGET BILL:** The budget bill has been approved by the House and Senate, and once it has been signed by the Governor the following will be provided to you.

- Initial Allotments will be distributed within two weeks.
- Salary Schedules will begin being posted to the website.
- New hospital insurance, and retirement rates as well as effective dates will be communicated.

Should you have questions you may contact Paul LeSieur at 919.807.3700 or [plesieur@dpi.state.nc.us](mailto:plesieur@dpi.state.nc.us).

**(2) BUD Release 6.4.0:** DPI sent the BUD release to your AS/400 between July 28-August 1. Approximately ninety LEAs are now operating on the new BUD Release.

BUD Release 6.4.0 contains the following enhancements:

- changes for the calendar bill to allow for 21.5 days,
- correct the retirement calculation in adjustment batches for retired teachers (object code 128) to post to the correct 228 account code, and
- Rewrite of the BUD Purge Program.

Please keep in mind that DPI cannot transmit your communication forms, federal allotment amounts, carryover amounts, COA changes, etc. unless you are on BUD Release 6.4.0.

The install instructions are available on the FBS webpage under the "What's New" section: <http://www.ncpublicschools.org/fbs/>.

If you have any problems installing the release, please contact the Education Support Center Help Desk at 919-807-4357. Please tell them that you are installing BUD Release 6.4.0.

**(3) NOTICE - July Datafile and the Salary System:** Due to technical issues with DPI's server, we are experiencing a delay in loading the July UERS Salary data file to the salary system. It is expected that the data will be loaded by early next week, but no definite date has been determined yet. **DPI will post an announcement to the Lic/Sal web announcement page as soon as the data is loaded.**

**(4) ABCS BONUSES:** Funds for the ABCs incentive awards for teachers, principals, other certified staff, and teacher assistants will be distributed to local education agencies and charter schools within a few days. Funding is not available until the General Assembly approves the state budget for fiscal year 2005-06.

**(5) E-Rate Training Opportunity:** We are in the beginning stages of planning an E-Rate training session involving staff from the Schools and Libraries Division (SLD) of USAC, to take place in late October or early November (date has not yet been set, and will depend on the SLD schedule). This training session would be offered simultaneously at sites across the state served by the North Carolina Information Highway, to enable as many school systems and libraries as possible to participate. For planning purposes, we need to know how many people from your school system are interested in attending. A maximum of 3 per LEA is suggested to assure adequate space. Please contact Stephanie English, State E-Rate Coordinator, at 919-807-3686 or [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us) as soon as possible, but no later than Friday, August 19, with the number of participants from your school system.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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Newsletter No. 005-05/06, August 16, 2005

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) 05/06 BUDGET SUMMARY:** Last week we sent you information regarding the budget as it stood prior to the vote of the House and Senate. The Governor signed the budget on Saturday, August 13. We have attached a comparison of the Governor, House, Senate and Final budgets.

--The \$44.3 million discretionary reduction remains in the continuation budget; therefore LEAs will need to reduce their budgets again after the revised initial allotments are distributed.

--The 2005-06 Salary Schedules are on the Financial and Business Services web site under "**Manuals**".

**Note the following items of interest in Senate Bill 622:**

--The raises for school building administrator's (2.11%) and individuals paid on the teacher salary schedule (2.24%) (actual salary increases will vary based on years of experience).

-- Raises for all other employees are the greater of \$850 flat amount or 2.00% annual salary increase for full-time permanent employees (9, 10, 11, and 12 months).

--Retirement Rate - 6.82% - Teachers and State Employees.

--Hospital Insurance \$3,748 - The monthly rate will increase from \$286 per month to approximately \$321.11 per month **beginning October 1**.

--40 additional Annual Leave hours (5 Days) - for full-time permanent employees of local boards of education not paid on the Teacher Salary Schedule or the School Based Administrators Salary Schedule and employed on September 1, 2005, who are eligible to earn annual leave shall have a one-time additional 5 days of annual leave credited on that date. It shall be accounted for separately, carried forward as in years past, and shall remain available until used.

Permanent part-time employees shall receive a pro rata amount of 20 hours.

--Certified employees paid on the teacher's salary schedule with 29+ years of experience shall receive a one-time bonus of 1.58%.

--Certified employees paid at the top of the principal and assistant principal salary schedule shall receive a one-time bonus of 2%.

Permanent part-time personnel shall receive the bonus adjusted pro rata.

--Eckerd Youth Alternative Therapeutic Camps (EYA) - This year you will not be required to verify and/or remit a check for children attending the EYA. Funds in the amount of \$1.6 million will be reduced from the At-Risk allocation prior to allocating funds based on the formula. A permanent transfer will be made to the Department of Juvenile Justice to support the program. There will be no additional reduction to the Exceptional Children funding for the EYA.

There is a clause under the retired teacher language which is being reviewed pertaining to teachers retiring on or before August 1st. We are requesting clarification prior to giving you guidance on the remainder of the language in Section 29.28 in Senate Bill 622.

--Retired Teachers returning to classroom are exempt from the cap. - LEA must continue to pay 11.7%.

**(2) New Benefit Rates Downloaded to BUD:** DPI transmitted a BUD file containing the FY 2005-2006 benefit rates to your LEA on Monday, August 15, if your LEA is on the current release of BUD. Your LEA must be using BUD Release 6.4.0 in order to get the new rates.

Please see the attachment for instructions on how to update your Federal Budgets/Amendments with the new benefit rates.

If you are not on BUD Release 6.4.0, you can find the install instructions on the FBS web page under "What's New": <http://www.ncpublicschools.org/fbs/>

Please call the Customer Response Center at 919-807-4357 if you have any problems regarding the attachment or installing BUD Release 6.4.0.

**(3) LEA-wide weather related Calendar Waiver Requests:** Waivers for the beginning and end date of the school year granted for the 2005-06 school year are for that year only and expire June 30, 2006. LEA-wide waivers are based on the 10 year inclement weather history, and an updated list of LEAs eligible to request a waiver can be found at <http://www.ncpublicschools.org/fbs/closeddays10years.html>

If your LEA is planning to submit a waiver request, the completed form must be submitted to DPI by November 1st, 2005. The request form can be found on the website at <http://www.ncpublicschools.org/fbs/calendar07waiverlea.pdf>. If you have any questions concerning the LEA-wide waiver, contact Alexis Schauss at 919.807.3708 or [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(4) E-Rate Training Opportunity:** We are in the beginning stages of planning an E-Rate training session involving staff from the Schools and Libraries Division (SLD) of USAC, to take place in late October or early November (date has not yet been set, and will depend on the SLD schedule). This training session would be offered simultaneously at sites across the state served by the North Carolina Information Highway, to enable as many school systems and libraries as possible to participate. For planning purposes, we need to know how many people from your school system are interested in attending. A maximum of 3 per LEA is suggested to assure adequate space. Please contact Stephanie English, State E-Rate Coordinator, at 919-807-3686 or [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us) as soon as possible, but no later than Friday, August 19, with the number of participants from your school system.

\*\*\*\*\*  
**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

\*\*\*\*\*  
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TO: Finance Officers

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**Questions and Answers:** Attached are three questions and answers:

--"Top of the Scale" Bonus for teachers, instructional support and school based administrators who are at the top of their respective salary schedule.

--"8500R2.0Raise" Q&A related to \$850 or 2.0% raise

--Calendar Bill

Contact Paul LeSieur with questions at [plesieur@dpi.state.nc.us](mailto:plesieur@dpi.state.nc.us) or 919.807.3700.

**2005-06 Substitutes Pay Ranges:** Substitute rates were affected by the Calendar Bill (HB1464), where it states that the "substitute rates and annual leave pay outs shall be calculated based on a 22 day month". The substitute minimum rates are as follows:

**Non certified:** 50% of (A00 Daily rate / 22 days)

$\$2,551/22=115.95$

$115.95 \times 50\% = 57.97 = \$58$

**Certified:** 65% of (A00 Daily rate / 22 days)

$\$2,551/22=115.95$

$115.95 \times 65\% = \$75.37 = \$75$

Substitute Maximum rates is the daily rate for a A00 calculated at 22 days

$\$2,551/22=115.95$

**Please note that these are only minimum and maximum dollar amounts allowable from State funds. LEAs may choose to pay anywhere within the range as long as a non certified substitute is not paid more than a certified substitute.**

**Hospital Insurance 05/06 Calculation:** We have attached a calculation of the Hospital Insurance for FY05/06 for your convenience.



**July MFR's Netviewed:** Please note that DPI will be netviewing MFR's for the month July-FY'06 this week on Thursday, August 18th. Due to requests from the finance officers, this is the first year that we are sending MFR's of the new fiscal year before October. **Please do not confuse the July reports with the 13th month MFR reports.**

Reminder: We will do a final pull of your 13th month MFR information on the night of August 25, 2005.

If you have any questions, please contact Richard Smith at 919-807-3729 or email at: [rismith@dpi.state.nc.us](mailto:rismith@dpi.state.nc.us)

Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 006-05/06, August 24, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**REMINDERS:**

**(1) 13th Month MFR - August 25:** Thursday, August 25th, DPI will be picking up the 13th Month File. If you have made any changes to the file please go into FY05 and REBUILD the file for 13th Month!

**Reminder: You must be in FY05.**

If you have questions contact Kendall Jordan at [kjordan@dpi.state.nc.us](mailto:kjordan@dpi.state.nc.us) or 919.807.3721.

**(2) Top of the Scale Bonuses:**

Teachers and Instructional Support certified persons are only eligible for the 1.58% top of the scale bonus if they were on step 29 **BEFORE** the bump. Therefore, they are at step 30 as of July 1, 2005.

Principals and Assistant Principals are only eligible for the 2.0% bonus if they are at the top of their respective salary schedule **BEFORE** the bump.

These bonuses are in lieu of a step increase and no employee shall receive a step increase **AND** the bonus.

**(3) Allotment Schedule:**

1. Initial Allotments- Uploaded to MSA on Thursday, August 18, 2005. Allotment Reports net viewed during the day on Friday, August 19, 2005.
2. Allotment Revision 1 - Upload on Wednesday, August 24, 2005 to MSA. Allotment Reports will be available for printing on Friday, August 26, 2005. This allotment revision will reduce LEA initial allotments for new and growing charter schools. This revision will also allot the first third of the FY 05-06 funding to charter schools with a current certificate of occupancy on file with the Office of Charter Schools at the Department of Public Instruction.
3. Discretionary Reduction - The Discretionary Reduction Worksheet will be mailed to LEA Superintendents, Finance Officers, and the Personnel Administrators on August 24, 2005. The reduction spreadsheet will be due back to School Allotments by September 9, 2005.
4. Allotment Revision 2 - Upload to MSA on Wednesday, August 31, 2005. Allotment Revision 2 reports will be available for printing on September 2, 2005. This revision will include, ABC Incentive Awards, FY 2004-05 Carryover re-allotments, and Special Small School Allotments.

These revisions will come very quickly because we want to get the funding out as soon as possible. It is important that you check your AS400 regularly and print reports when you see them to avoid losing the data.

If you have any questions, please contact School Allotments at (919) 807-3739.

**On the Web:**

**(1) BUDGET INFORMATION:** We have sent you several attachments in the last few weeks about the 05-06 Budget. The following attachments have been place on FBS website (<http://www.ncpublicschools.org/fbs/>) for your convenience:

2005 Bonus Leave  
Top of the Scale Bonus 2005 - Q&A  
2005 Legislative Rage \$850.00 - Q&A  
2005-2006 Payroll - Q&A  
2005-2006 Salary Schedules  
2005-2006 ABC Incentive Awards Allotment  
2005-2006 ABC Incentive Award Instructions  
Calendar Waiver Request Information

**(2) NCDPI Launches Redesigned Web Site:** Back to school marks the launch of a new look for DPI's Web site. The Communications & Information Division has unveiled a new home page (<http://www.ncpublicschools.org>) geared toward helping visitors get the information they need more easily. Graphically, this fresh entryway reflects ongoing changes to the remainder of the site. This new design also brings to the forefront several new tools to help visitors access information more quickly and efficiently. Features include dropdown menus containing lists of program areas and departments, common questions, highlights, and fast access the School Report Cards, the Education Directory, NCWISE, as well as other key information.

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To: Finance Officers

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**As you probably are aware by now, June Atkinson was sworn in as State Superintendent on Tuesday, August 23. We welcome her and are looking forward to working with her.**

**Allowable Carryover:** Attached is a spreadsheet that gives the allowable carryover from FY 2004-05 that will be allotted in revision 2 for FY 2005-06. Remember that At-Risk Student Services and Improving Student accountability carryover reverts August 31 and must be spent prior to then. Staff Development carryover reverts December 31. If you have any questions, please contact School Allotments at 919-807-3739.

**Allotment Revision 1:** Allotment Revision 1 uploaded to MSA last night and reduces the FY 2005-06 Initial Allotments for new and growing charter schools. The Allotment Revision report will be available for printing from the AS400 on Friday, August 26, 2005. If you have any questions, please contact School Allotments at 919-807-3739.

**Discretionary Reduction Worksheet:** The FY 2005-06 Discretionary Reduction Worksheet was emailed to the Superintendents, Finance Officers and Personnel Administrators on August 24, 2005. This Worksheet is due back to the School Allotments Section indicating reductions on September 9, 2005. If you have any questions, please contact Christal Kelly, 919-807-3675 or Karen Peng, 919-807-3750.

**Charter School Allotments:** The first 34% of the anticipated FY 2005-06 Initial Allotments for Charter Schools was uploaded to MSA on Wednesday, August 24, 2005. Information on how the Initial Allotment was calculated will be emailed to the Charters Schools this week. Please contact Judy Wilkinson at 919-807-3747 if you have questions.

**Reemployed Retiree Policy:** To update you on the provisions of Senate Bill 622 and how it affects reemploying retirees, review the two attachments, Reemployed Retiree Policy Chart, and the Reemployed Retirees Returning to Work Question and Answer Sheet. While the attachments may not answer all your questions, it should be useful in getting a basic understanding of the provisions. Information concerning bonus leave, salary increases, and other budget provisions are posted on our web site. Please go to <http://www.ncpublicschools.org/fbs/> to view these items. We know there will be questions concerning reemploying retirees that may not be answered using the attached documents. Please call or email Larry Simmons [lsimmons@dpi.state.nc.us](mailto:lsimmons@dpi.state.nc.us) or 919-807-3364 if you need further clarification.

Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**Newsletter No. 007-05/06, September 8, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) FINAL AFR 13th Month Pick-up:** The latest set of AFR reports were netviewed Wednesday night. Please print and review these reports carefully.

If you still have differences and errors, you need to:

- 1) correct your data
- 2) RE-BUILD your file in FY 05 period 13 (you MUST be signed into FY 05 to correctly rebuild the file and you MUST rebuild the file for your changes to be picked up by DPI)

There is a FINAL pick up scheduled for Monday night, September 12th! This will be the FINAL PICK UP!!!!

Please contact Kendall Jordan if you have any questions/concerns.

**(2) HB 1491 INSURANCE FOR SCHOOL SOCIAL WORKERS:** Under this new legislation, school districts are required to reimburse social workers for their increased premiums, if the LEA requires an employee to increase auto liability limits under their personal policies. If a school district does not require social workers to purchase additional limits under their personal automobile policies, then claims arising out of a social worker's use of their personal automobile on school business (which exceed the social worker's workers personal automobile insurance limit) could potentially be covered under the LEA's coverage with the NC School Board Trust or another automobile liability provider.

Before requiring your social worker to increase their auto liability coverage, LEAs may want to check with your auto insurance provider. Hired and Non-owned insurance provisions under an LEA's automobile contract may already provide adequate limits and coverage.

Call Eileen Townsend, Section Chief, DPI Insurance, 919-807-3522 or email, [etownsen@dpi.state.nc.us](mailto:etownsen@dpi.state.nc.us) if you would like additional information.

**(3) Clarification on the School Closing Date:** Communication was recently sent out concerning the school calendar requirements. The 6th item on that communication stated

\* If the State Board of Education has not granted a calendar waiver based on the 10-year inclement weather history, what is the latest closing date for the current school year? The school closing date shall not be after June 10th.

This item was referring to the original calendar dates set by the local board of education. However, all schools must have 180 instructional days in the school year and there is no waiver for this requirement. If there are circumstances that result in instructional days being missed and there is no ability to make up the days before June 10th, a local board of education may move the closing date past June 10th in order to fulfill the 180 day requirement. The last school day must be prior to July 1.

**(4) Assistance Team non salary expenses:** Effective July 1, 2005, all non salary expense items in the PRC037 chart of accounts were removed. Assistance team members were notified that they are now required to submit all travel and other reimbursement directly to DPI Curriculum area, Attn: Jackie Colbert, Director. Any expenditures received on the non salary object codes in State PRC037 through datafile will be denied and a refund will be required.

**(5) 2006 Federal Advanced Placement and International Baccalaureate Fee Program:** The U.S. Department of Education has awarded North Carolina funding that permits the payment of registration fees for the 2006 administration of AP & IB examinations. Review the attached AP Fee Reduction Memorandum and attachment concerning the allotment of these funds. If you have questions contact Wandra Polk at 919.807.3817 or [wpolk@dpi.state.nc.us](mailto:wpolk@dpi.state.nc.us).

**(6) Class Size Averages and Individual Class Size Ratio:** The North Carolina General Assembly has adjourned for this year and there are no changes in class size maximums for the 2005-06 school year. Attached you will find information regarding LEA-wide class size averages and individual class size ratios. If you need additional information regarding class size, please refer to Chapter 4 of the School Attendance & Student Accounting manual. The manual can be found at [www.ncpublicschools.org/fbs](http://www.ncpublicschools.org/fbs). If further assistance is needed, please contact Katrina Thorne at (919) 807-3734 or Scott Douglass at (919) 807-3737.

**(7) Enrollment of Gulf Coast Evacuees:** Please find attached a document detailing enrollment and immunization requirements of the Gulf State evacuees. This document can be found at <http://www.ncpublicschools.org/fbs/> under "What's New"

**(8) School Bus Safety Web Site Redesigned:** The North Carolina School Bus Safety Web site, [www.NCBUSSAFETY.org](http://www.NCBUSSAFETY.org), has recently been redesigned to make the site easier to navigate and more informative for school transportation personnel, parents and students. Every few weeks the home page will feature a photo and article related to school transportation in North Carolina. The Institute for Transportation Research and Education at NCSU maintains the School Bus Safety Web site with funding from the Governor's Highway Safety Program. Questions or comments should be directed to Laurie Vandiford Hobbs at [lav@unity.ncsu.edu](mailto:lav@unity.ncsu.edu).

**(9) NC WISE HAS NEW STATUS PAGE:** A new status page is available on the NC WISE Web site. The page provides users with information on recent system-wide problems, issues and workarounds if available. The page is updated frequently allowing personnel to monitor the status of software problems. Using the Help Desk Education Automation Tool (HEAT) System, the NC WISE Help Desk closely monitors the types of errors that users report. When multiple calls are received for a particular issue, the NC WISE Help Desk posts the issue to the Status Page. Related information will be provided and updated frequently until a problem has been resolved. To access the Status Page, please go online to [http://www.ncwise.org/ncwise\\_status\\_page.htm](http://www.ncwise.org/ncwise_status_page.htm). If you have additional questions, please contact the NC WISE Help Desk at 919/807-4357 or email [sis\\_support@dpi.state.nc.us](mailto:sis_support@dpi.state.nc.us).

**(10) NC WISE AUGUST NEWSLETTER ONLINE:** The August edition of the NC WISE "Words to the Wise" newsletter is now available online. To read or download the newsletter, please visit the NC WISE Web site at [www.ncwise.org](http://www.ncwise.org) and click on [http://www.ncwise.org/newsletter/wise\\_newsletter\\_082605.pdf](http://www.ncwise.org/newsletter/wise_newsletter_082605.pdf).

**(11) Proposals for Consulting Services to Study the Transportation Funding Formula:** The Department of Public Instruction has issued a request for proposals for consulting services to study the Transportation Funding Formula. The document is available through the Division of Purchase and Contract web page at <http://www.ips.state.nc.us/ips/AGENCY/PDF/04391200.pdf>.



**(12) REMINDER: Discretionary Reduction Worksheet:** The FY 2005-06 Discretionary Reduction Worksheet was emailed to the Superintendents, Finance Officers and Personnel Administrators on August 24, 2005. This Worksheet is due back to the School Allotments Section indicating reductions on September 9, 2005. If you have any questions, please contact Christal Kelly at (919) 807 - 3675 or Karen Peng at (919) 807 - 3750.

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 008-05/06, September 15, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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(1) **NOTICE:** The AS/400 will be shutdown completely at 4pm today, Thursday, September 15th for approximately two (2) hours for repairs. The system will be back up at 6pm. Sorry for any inconvenience.

(2) **Matching Retirement Adjustment:** The North Carolina Retirement System recently sent a letter to all Finance Directors stating that the difference that has resulted between the employer matching amount paid and the employer matching amount calculated at the new 6.82% rate should be adjusted by no later than October 31, 2005. This adjustment must be made at the individual 221 object code levels. (Fund, purpose, PRC, object code level - you do not need to post it to the individual school code levels) SunPac and ISIS users have query reports that will calculate the matching difference by individual budget code. Please use these reports to accrue the adjusting invoices to your next payment to the retirement system. Remember, the adjustments **MUST** be made at the individual 221 object code level. There is NO single adjustment budget code as was available last year. If you have any questions please contact Ally Barfield at 919-807-3715 or [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us).

(3) **Change in IRS Mileage Rate:** The Office of State Budget and Management has distributed a memo detailing a change in the IRS mileage rate. I have attached the memo for your review. You will also find the memo on our website at [www.ncpublicschools.org/fbs/](http://www.ncpublicschools.org/fbs/) under "What's New."

(4) **Estimated Lottery Distribution:** Estimated Lottery Distributions for LEAs is posted on our website at [www.ncpublicschools.org/fbs/](http://www.ncpublicschools.org/fbs/) under "What's New."

(5) **REMINDER - Assistance Team non salary expenses:** Effective July 1, 2005, all non salary expense items in the PRC037 chart of accounts were removed. Assistance team members were notified that they are now required to submit all travel and other reimbursement directly to DPI Curriculum area, Attn: Jackie Colbert, Director. Any expenditures received on the non salary object codes in State PRC037 through datafile will be denied and a refund will be required.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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**Newsletter No. 009-05/06, September 23, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

\*\*\*\*\*

**(1) Federal Initial Allotments:** The Federal Initial Allotments uploaded to MSA on Wednesday, September 21, 2005 in Allotment Revision 4. Please see the attached Federal Initial Allotment Formula File for more information on which PRCs were uploaded. This file also notes whether 100% or an installment of funding was allotted. Only LEAs/Charters with approved applications and budgets received funding. Please contact the School Allotments Section at (919) 807 -3739 if you have any questions.

**(2) Matching Retirement Adjustment:** The North Carolina Retirement System recently sent a letter to all Finance Directors (see attached) stating that the difference that has resulted between the employer matching amount paid and the employer matching amount calculated at the new 6.82% rate should be adjusted by no later than October 31, 2005. This adjustment must be made at the individual 221 object code levels. (Fund, purpose, PRC, object code level - you do not need to post it to the individual school code levels) SunPac and ISIS users have query reports that will calculate the matching difference by individual budget code. Please use these reports to accrue the adjusting invoices to your next payment to the retirement system. Remember, the adjustments MUST be made at the individual 221 object code level. There is NO single adjustment budget code as was available last year. If you have any questions please contact Ally Barfield at 919-807-3715 or [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us).

**(3) Discretionary Reduction:** The Discretionary Reductions were processed in Allotment Revision 4 on Wednesday, September 21, 2005. Please remember that the amount of the reduction on Allotment Revision 4 will differ for the Discretionary Reduction Worksheet for the position and the months of employment allotments because the Worksheet calculates the reduction at the Statewide Average Salary and the Allotment Revision calculates the reduction at the LEA's Average Salary. The reduction on the worksheet USES the Statewide Average Salary because this is the salary used to fund the State Public School Fund Budget. The allotment after the Discretionary Reduction should match the last column on the Discretionary Reduction Worksheet. If you have any questions, please contact the School Allotments Section at (919) 807 – 3739.

**(4) Make It A Goal: Revert NO Federal Money:** Please pay close attention to your FY 2003-04 federal grant funds and help our state revert zero, no, nada, zilch, nil federal funds. Funds for grants with a 15 month term must be spent by September 30, or the funds revert. Funds for grants with a 27 month term must be encumbered by September 30 and those encumbrances must actually be liquidated by December 31, or the funds revert. If you have any questions, please contact School Allotments at (919) 807 - 3739.

**(5) MSA Cash Management Training:** MSA and Cash Management training is being offered this year on the following dates: November 1, 2005, January 18, 2006, and March 28, 2006-LEA's only; and December 7, 2005 - Charter schools. There is no registration fee for the class, but you must register in order to attend. On-line registration is available at the following site: <http://training.dpi.state.nc.us/>. Class description: "Surviving the School Business Jungle" - DPI Systems Training. This class is designed for those who work in an LEA or Charter schools finance office - Finance Officers and finance staff. The class consists of "hands-on" training in the MSA/DBS General Ledger System and the Cash Management System. Instruction is targeted to the beginner or new user, or as a refresher. Questions for the LEA training, please contact Richard Smith at [rsmith@dpi.state.nc.us](mailto:rsmith@dpi.state.nc.us) or (919) 807-3729; and questions for charter school training, contact Karen Frazier at [kfrazier@dpi.state.nc.us](mailto:kfrazier@dpi.state.nc.us) or (919) 807-3738.

**(6) Flood Insurance:** A letter dated 9/7/2005 was sent to school finance directors from Janice T. Burke from the Department of State Treasurer regarding Flood Insurance. If you are an Insured Member of the Public School Insurance Fund, please be advised that a certificate of insurance has been prepared for your LEA and provided to the Department of State Treasurer.

Please keep in mind that if your school property is located in Flood Zones "A or V," coverage is only available from the National Flood Insurance Program (NFIP) through FEMA. Insurance offered by the Public School Insurance Fund for Flood Zones "A & V" is excess coverage over NFIP and subject to the special flood deductible equal to all flood insurance that would have been available in the flood occurrence as if the community participated in the national flood insurance program. Please review your flood plan maps as drawn by FEMA and secure coverage accordingly.

Contact Eileen Townsend, Section Chief, Insurance if you would like more information or a copy of the Certificate of Insurance sent to the State Treasurer's office.

[ETownsen@dpi.state.nc.us](mailto:ETownsen@dpi.state.nc.us) or 919.807.3522.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 010-05/06, September 29, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**Sales Tax Refunds and How it Should be Handled:**

- 1) The State tax paid in 2005-06 will be redirected in 2006-07 (when LEAs would normally receive the reimbursement) to the State Public School Fund. So you would apply in 2005-06 for the State tax paid in 2004-05 (4.5 cents), but you would not apply in 2006-07 for the State tax paid in 2005-06.
- 2) The amount redirected is based on previously filed reports. You will not be able to apply for a refund of your State sales taxes paid in FY 2006-07. In fact, you will not have to file any report related to State sales taxes.
- 3) The 'intent' of the General Assembly action was to redirect the 4.5 cents to the State Public School Fund and allow you to apply to get reimbursed the 2.5 cents (local). The language in the Budget Bill (Section 7.51) does eliminate your ability to apply for any sales tax refund; however, we do think the language will be modified in the short session to allow you to apply for reimbursement of the 2.5 cents (in other words, keep your records because you will be able to apply for the local sales tax paid next year).

If you have any additional information on sales tax refunds you may contact Alexis Schauss at (919) 807-3708 or Paul LeSieur at (919) 807-3701.

**First Month ADM Adjustments**

ADM adjustments will be handled as in the past. A letter or e-mail requesting us to review your ADM from your first month principal monthly report is required for an adjustment to be made to your allocations. You must have 100 in ADM or 2% increase over your initial allotment ADM to be eligible receive additional funding.

Please refer to the Allotment Policy Manual for additional information regarding how to apply for and what you may receive if your LEA meets the requirements for additional ADM increases in the first or second month of school.

<http://www.ncpublicschools.org/fbs/allot/general.html#allotgrowth>

For additional questions you may contact the School Allotment Section at (919) 807-3739 or Paul LeSieur at (919) 807-3701.

**Salary System:**

DPI is investigating a potential problem with the way the salary system is calculating pay for employees on installment pay with an indicator code of 3. We will update you on this situation in the next newsletter.

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**Newsletter No. 011-05/06, October 5, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) LEA Full-time Personnel and Salary Supplements Data:** Two forms are attached to collect essential data we cannot get by any other means: Public School Full-time Personnel Report (SS-200) and Local Salary Supplements Report (SS-300). Review the attached memorandum and follow the instructions for completion of the reports. Please have all forms completed and returned via e-mail no later than October 31, 2005. If you have any questions, contact Dr. Muhammad Mannan at (919) 807-3756.

**(2) Textbook Purchases:** As we near a closure to this year's textbook purchase/delivery cycle, several issues have arisen that are of concern. Please review the attached memorandum concerning these issues.

**(3) Estimated Lottery Distribution:** The Estimated Lottery Distribution File has been updated to reflect the redistribution of the average daily membership when boundaries cross county lines. The new calculation will be posted to the website this week. Please go to "What's New" on the following website for the updated calculation: <http://www.ncpublicschools.org/fbs/>. Contact the School Allotments Section if you have any questions at (919) 807-3739.

**(4) Salary System:** As we indicated in the last Newsletter, DPI is investigating a potential problem with the way the salary system is calculating pay for employees on installment pay with an indicator code of 3. We appreciate your patience as we are still researching the problem. We will update you soon.



**(5) Matching Retirement Adjustment:** The North Carolina Retirement System recently sent a letter to all Finance Directors (see attached) stating that the difference that has resulted between the employer matching amount paid and the employer matching amount calculated at the new 6.82% rate should be adjusted by no later than October 31, 2005. This adjustment must be made at the individual 221 object code levels. (Fund, purpose, PRC, object code level - you do not need to post it to the individual school code levels) SunPac and ISIS users have query reports that will calculate the matching difference by individual budget code. Please use these reports to accrue the adjusting invoices to your next payment to the retirement system. Remember, the adjustments MUST be made at the individual 221 object code level. There is NO single adjustment budget code as was available last year. If you have any questions please contact Ally Barfield at 919-807-3715 or [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us).

**(6) Travel Directive Amendment:** In compliance with Governor Easley's directive to restrict state employees' travel, OSBM issued a set of travel directives establishing a "no travel" policy with limited exceptions. Please review the attached memorandum. The travel directive issued by the State Budget Office on September 12, 2005 has been extended to October 31, 2005. To the maximum extent possible, agencies should engage in energy conservation practices.

**(7) Employment Security Commission Invoices and Statements:** The ESC is currently preparing year end invoices and unemployment statements. These will be mailed to your LEA on or about November 15, 2005. However, you will be able to access the information early using your online ESC account. It will be available the week of October 24, 2005. (You will be reminded and notified of the exact date as it approaches.) The individual in your LEA assigned to receive communication about unemployment from the ESC will receive the year end information.

It is important that the year end statement be reviewed, prepare the worksheets that you will receive from DPI, and mail your unemployment payment check back to us. (Instructions about this process will be forthcoming)

The ESC will not grant us any waivers for late payments. We are committed to provide them with full payment by January 9, 2006.

Please call or email Tarsha Silver 919.807.3521 or [silver@dpi.state.nc.us](mailto:silver@dpi.state.nc.us) with any questions.

**(8) 2006-07 Calendar Waiver Deadline:** The deadline to request a LEA-wide or individual school calendar waiver for the 2006-07 school year is November 1, 2005.

LEA-wide waivers must be requested annually. A list of LEAs eligible to request a LEA-wide waiver due to their 10 year history of inclement weather is on the FBS website at <http://www.ncpublicschools.org/fbs/calendar04.html> "10 Year Closing History". Those LEAs who would like to request a waiver should complete the Waiver Request Form "06-07 by LEA" found on the same webpage.

Individual School or Program waivers are renewed on the same cycle as the school improvement plan. All schools must request a waiver, even those under SB 656, Innovative Education Initiatives Act. Those LEAs who would like to request a school waiver should complete the Waiver Request Form "06-07 by Individual School or Program" found on the same webpage.

The State Board of Education will act on calendar waivers once each year. **Missing the November 1 deadline will delay your request for one year.**

If you have questions, please contact Alexis Schauss at [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**WAY TO GO!** **Durham Public Schools Transportation Services** was recently recognized nationally by School Transportation News for having the best public sector transportation newsletter. Read about it at [www.ncbussafety.org](http://www.ncbussafety.org).

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 012-05/06, October 14, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Salary System News:** DPI has inserted the September vouchers (Pay Period 3) in the salary system as of October 10, 2005.

Please Note: DPI is experiencing problems with our server. Your patience is appreciated while we work to resolve the issues.

**(2) Revisions To Property Risk Control Services:** The Governor's call for fuel conservation has prompted Public School Insurance Fund to review our school inspection travel practices, and to find better ways to do our part in the conservation effort. To achieve this goal and maintain our commitment to provide quality loss control services, we have revised our survey inspection method.

Risk Control Specialists will begin to utilize teleconferencing as a means to identify concerns prior to conducting physical Risk Control Field Inspections. They will contact maintenance directors, finance officers and personnel they have worked with in the past via phone to begin oral communication of how inspections will be conducted. We will strive to inspect properties based on prior recommendation concern, and will continue to inspect any properties you request. Property, where we have not had loss control issues in the past, will be inspected as time permits.

This revision reduces the number of visits to a school system; the number of miles traveled; and allows us to cover more than one school system in a planned trip.

Teleconferencing will again be used to convey the results of our property survey back to your school system; together we will develop improvement plans.

It is our hope that this revision will continue to focus on servicing your school needs and require less of your time and resources. If you have circumstances that require our service outside of this plan, please contact your Risk Control Specialist. Or, you can contact Joseph Gramer at DPI 919-807-3532.

Your insurance coverage will not be affected by this revision. Please let us hear from you with any problems or concerns.

Please share this information with your Maintenance Director.

**(3) REMINDER: 2006-07 Calendar Waiver Deadline:** The deadline to request a LEA-wide or individual school calendar waiver for the 2006-07 school year is November 1, 2005.

LEA-wide waivers must be requested annually. A list of LEAs eligible to request a LEA-wide waiver due to their 10 year history of inclement weather is on the FBS website at <http://www.ncpublicschools.org/fbs/calendar04.html> "10 Year Closing History." Those LEAs who would like to request a waiver should complete the Waiver Request Form "06-07 by LEA" found on the same webpage.

Individual School or Program waivers are renewed on the same cycle as the school improvement plan. All schools must request a waiver, even those under SB 656, Innovative Education Initiatives Act. Those LEAs who would like to request a school waiver should complete the Waiver Request Form "06-07 by Individual School or Program" found on the same webpage.

The State Board of Education will act on calendar waivers once each year. Missing the November 1 deadline will delay your request for one year.

If you have questions, please contact Alexis Schauss at [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(4) State Board Meeting Highlights:** The State Board of Education last week. Complete Board Highlights are posted online at <http://www.ncpublicschools.org/sbehighlights>.

**(5) 2005 HRMS Conference:** Please see attached information regarding the upcoming 2005 HRMS Conference, December 4-7 at the Koury Convention Center/Sheraton in Greensboro, NC. Please contact Jennifer Pugh ([jpugh@dpi.state.nc.us](mailto:jpugh@dpi.state.nc.us)) or Mike Muirhead ([mmuirhea@dpi.state.nc.us](mailto:mmuirhea@dpi.state.nc.us)) at 919-807-3249 for additional conference information or questions.

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 013-05/06, October 19, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) DUE NOW - Matching Retirement Adjustment:** The North Carolina Retirement System requests that all differences between the employer matching amount paid and the employer matching amount calculated at the new 6.82% rate be adjusted by no later than October 31, 2005. The adjustment may be included with your regular October reporting or it may be submitted earlier as a separate adjustment. If you choose to submit it as a separate adjustment, please mail it to the attention of Janice Wilkins with the North Carolina Retirement System and include a note stating that it is to adjust the July and August retirement matching. If you have any questions about the adjustment amount owed by your LEA, please contact Janice Wilkins at 919-508-5348. If you have any questions about making the adjustments by fund to the individual 221 object codes, please contact Ally Barfield at 919-807-3715 or [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us).

**(2) Travel Directive:** On September 30, 2005, at the direction of Governor Easley, OSBM issued a directive restricting statewide travel. Since its issuance, circumstances surrounding fuel availability have improved. In light of these changed circumstances, OSBM is rescinding the Memo of September 30, 2005, but continues to ask that all future travel be managed in a prudent manner. See attached Memorandum from David McCoy, Office of State Budget Management.

**(3) LEA Full-time Personnel and Salary Supplements Data:** In the October 5, 2005 Newsletter we attached two forms to collect data; Public School Full-time Personnel Report (SS-200) and Local Salary Supplements Report (SS-300). We have attached the SS-200 form again because some LEAs have had problems with the previously sent form. Both forms can also be found on our website at [www.ncpublicschools.org/fbs/](http://www.ncpublicschools.org/fbs/). If you have any questions, contact Dr. Muhammad Mannan at (919) 807-3756.

**(4) REMINDER: 2005 HRMS Conference:** Please see attached information regarding the upcoming 2005 HRMS Conference, December 4-7 at the Koury Convention Center/Sheraton in Greensboro, NC. Please contact Jennifer Pugh ([jpugh@dpi.state.nc.us](mailto:jpugh@dpi.state.nc.us)) or Mike Muirhead ([mmuirhea@dpi.state.nc.us](mailto:mmuirhea@dpi.state.nc.us)) at 919-807-3249 for additional conference information or questions.

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**Newsletter No. 014-05/06, October 26, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) SALARY SCHEDULE INCREASE:** As you are aware, the Governor has authorized an increase in the teacher salary schedule. The following provides more detailed information on the effect.

Each step on the Bachelor's teacher salary schedule (A Schedule) will be increased by \$75.

The master's and NBPTS schedules will continue to be tied to the Bachelor's schedule with the 10% and 12% differential, respectively. Therefore, the Master's steps will be calculated as 10% x (Bachelors +\$75).

The Assistant Principal Schedule will continue to be 1% higher than the Master's schedule and the Principal's schedule will continue to be tied to the Assistant Principal schedule.

As a result Masters and NBPTS certified individuals will receive higher than the \$75 per month.

All individuals who are required to be paid from the State Certified Salary Schedules will receive the raise.

The effective date is the 5th pay period (which may not necessarily be November 1 for your LEA). DPI will adjust the salary system for the 5th pay period data, therefore, ALL 5th pay period certified data should reflect the new salary schedules and no proration should take place.

Your allotments will be reflected accordingly and more details on this will be sent shortly.

Attached are the new teacher/instructional support schedules. The new school based administrators salary schedules will be posted before the end of the week.

## Substitute Pay

Effective 5th pay period Substitutes Pay Ranges:

The substitute minimum rates are as follows:

Non certified: 50% of (A00 Daily rate / 22 days)

$\$2,626/22=119.36$

$119.36 \times 50\% = 59.68 = \$60$

Certified: 65% of (A00 Daily rate / 22 days)

$\$2,626/22=119.36$

$119.36 \times 65\% = \$77.59 = \$78$

Substitute Maximum rates is the daily rate for a A00 calculated at 22 days

$\$2,626/22=119.36$

Please note that these are only minimum and maximum dollar amounts allowable from State funds. LEAs may choose to pay anywhere within the range as long as a non certified substitute is not paid more than a certified substitute.

Contact Alexis Schauss with questions at [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us) or 919.807.3708.

**(2) DUE NOW - Matching Retirement Adjustment:** The North Carolina Retirement System requests that all differences between the employer matching amount paid and the employer matching amount calculated at the new 6.82% rate be adjusted by no later than October 31, 2005. The adjustment may be included with your regular October reporting or it may be submitted earlier as a separate adjustment. If you choose to submit it as a separate adjustment, please mail it to the attention of Janice Wilkins with the North Carolina Retirement System and include a note stating that it is to adjust the July and August retirement matching. If you have any questions about the adjustment amount owed by your LEA, please contact Janice Wilkins at 919-508-5348. If you have any questions about making the adjustments by fund to the individual 221 object codes, please contact Ally Barfield at 919-807-3715 or [abarfiel@dpi.state.nc.us](mailto:abarfiel@dpi.state.nc.us).

**(3) POTENTIAL NCIH SITES FOR JULY 1, 2006 to JUNE 30, 2007:** School districts that are considering adding a North Carolina Information Highway (NCIH) site during FY 2006 (July 1, 2006 to June 30, 2007) and wish to be incorporated into the state's next consortium application for NCIH E-Rate funding should contact Stephanie English by November 15, 2005. Contact information is [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us) or 919/807.3686.

If you choose to participate as a consortium member, you will need to provide DPI with a signed Letter of Agency (LOA). DPI will e-mail this document to you. DPI and ITS



(NC Office of Information Technology Services) will then prepare and file the necessary documents for the E-Rate funding. Providing DPI with a signed LOA does not mean you MUST involve your school district in NCIH during FY 2006, you can choose to not to participate.

For information on NCIH technical requirements, please contact Brian Layh at [brian.layh@ncmail.net](mailto:brian.layh@ncmail.net) or 919/754.6622.

**(4) FACILITY NEEDS SURVEY ARRIVING SOON:** As required by NC General Statutes a facility needs survey is required to be completed by each LEA every five years. The results of this survey help to assess projected facility needs for the next 5-10 years, both statewide and locally. **Superintendents will receive the surveys** on CD-ROM within the next week and they should be forwarded to the appropriate staff to complete. Many of you may be asked to complete the survey. The completed surveys must be returned to School Planning by Tuesday, January 17, 2006. For more information, please contact Kenneth Phelps, School Planning, NCDPI, at 919-807-3561, or by email, [kphelps@dpi.state.nc.us](mailto:kphelps@dpi.state.nc.us).

**(5) UNEMPLOYMENT 2005 YEAR END BILLING:** You will receive your 2005 year end bill from the Employment Security Commission within the next weeks. Bills are being mailed directly to the designated LEA Unemployment Insurance Coordinator. Please coordinate with your Unemployment contact person if you are not directly involved in year-end charges. If you do not receive these statements, they are available online via the ESC website. (see attached instructions)

**The following information is due to DPI by 12/23/2005.**

Unemployment Billing Instructions and a Worksheet for unemployment benefits are attached. Please download the attached excel worksheet onto your C Drive and use for each claimant's payroll funding allocations.

See 2005 Unemployment Billing-Year End Audit instructions for information on accessing 2005 charges and how to complete worksheets. There should be a worksheet completed for EACH name on the list.

DPI will not incur penalties levied upon schools for late payments. Please provide the requested information by the date requested. (12/23/05)

Please contact Tarsha Silver if you have any questions at 919-807-3521 or [lsilver@dpi.state.nc.us](mailto:lsilver@dpi.state.nc.us).

**(6) NC EDUCATION DIRECTORY 2005-06:** A comprehensive guide to the professional staff in the state education department, education associations and organizations, individual schools systems and all public elementary and secondary schools in North Carolina is available. Directory is spiral bound with tabs for quick access to sections. To order a copy of the Education Directory, visit Publication Sales on the Web or call 1.800.663.1250 (inside North Carolina) or 919.807.3470 (outside North Carolina).

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**Attachments:** To get the attachments referenced in the newsletter, please email Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) and let her know which attachments to send.

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**Newsletter No. 015-05/06, November 8, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Reimbursement for Locally Paid Educators and Educators in Year Round Schools:**

The attachment provides further explanation and guidance on the reimbursement process for payment of the additional \$75 per month for Teachers and Assistant Principals for the 2005-06 school year. Should you have questions contact Alexis Schauss at [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us) or 919.807.3708.

**(2) Input Sought on 2006-07 Legislative Request:**

It's time to begin thinking about the 2006-07 legislative request. The NCDPI and the State Board of Education would like your input on education policy and finance as we continue to improve our schools. You can participate in this important process by completing the Budget Input Survey available online at <http://www.zoomerang.com/recipient/survey.zgi?p=WEB224RRQJB5V4>. Please complete the survey by Nov. 23.

You should contact Becky McConkey at [bmconke@dpi.state.nc.us](mailto:bmconke@dpi.state.nc.us) or 919.807.3741 with questions.

**(3) State Board Adopts Reduced Idling Incentives:**

On Thursday, November 3 the State Board of Education revised the Allotment Policy Manual as follows: **"In order to be eligible to receive any mid-year transportation allotment resulting from increased fuel prices, an LEA must have a reduced idling policy in place at the beginning of the school year. For the 2005-2006 school year, the policy must be in place no later than January 10, 2006. The local policy must, at a minimum, prohibit all unnecessary school bus idling on school grounds and prohibit the warming up of buses longer than 5 minutes. As always, any increase in allotments will be subject to the availability of funds."**

The North Carolina School Boards Association has provided a sample policy and administrative procedure that meet the requirements.

There are also videos and a driver training PowerPoint that may be of use in explaining the reduced idling issues to local boards of education. All of these idling materials are

available at <http://www.ncbussafety.org/ldling.html>. Transportation directors should mail locally adopted policies to DPI Transportation Services. Please contact Derek Graham with questions at [dgraham@dpi.state.nc.us](mailto:dgraham@dpi.state.nc.us).

**(4) E-Rate Training Session Scheduled:** An E-Rate training session will be held via the North Carolina Information Highway, on Monday, November 14, from 12:30 - 5 pm. Register online at [https://www.formrouter.net/forms@SLNC/erate\\_registration.htm](https://www.formrouter.net/forms@SLNC/erate_registration.htm). A maximum of 3 per LEA is suggested to assure adequate space. Also please note that you will need to download and print your own handouts for the training. Instructions for this are on the online registration form. This training will be videotaped for archiving on the web. Please contact Stephanie English at [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us) or Kathryn Wilson at [kathryn.r.wilson@ncmail.net](mailto:kathryn.r.wilson@ncmail.net) if you have questions.

**(5) State Board Meeting Highlights:** The State Board of Education met on November 2 and 3. Complete Board Highlights will be posted online at <http://www.ncpublicschools.org/sbehighlights> by tomorrow afternoon.

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To subscribe to the Finance Officers' Weekly Newsletter email or call Debby Jackson at [debjacks@dpi.state.nc.us](mailto:debjacks@dpi.state.nc.us) or 919.807.3603 and provide your name and email address.

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**Newsletter No. 016-05/06, November 18, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Governor's Salary Increase:** The School Allotments Section is recalculating the allotments to include the Governor's salary increase that was effective November 1, 2005. This allotment will be processed in Revision 11 and will upload to MSA on November 30, 2005. Allotment Revision Reports will be available on the AS 400 for printing on December 2, 2005. The following process will be used to calculate the increases:

**Position and Months of Employment Allotments** - The average salaries used to calculate the dollars for the position and months of employment allotments will be increased by \$525 for Teachers, Instructional Support, Career and Technical Teachers (per 10 month position), and Assistant Principals (per 10 month position). The average salary for Principals will be increased by \$600 (per 12 month position).

**Categorical and Dollar Allotments** - The funding generated from the salary increase on positions paid out of categorical and dollar allotments will be used to increase the budget for these categories. The formula will be recalculated and funding factors will be increased accordingly.

If you have any questions, please contact the School Allotments Section at (919) 807 - 3739.

**(2) 2006-07 School Calendar and Veteran's Day:** Many of you are completing your 2006-07 school calendars and the following question has arisen from several LEAs:

"If Veteran's Day (November 11th) falls on a weekend, are schools required to observe the Friday or Monday as a holiday?"

The Department of Public Instruction has received communication from the General Assembly legal staff on the response.

Yes, LEAs shall be required to designate a holiday on the same day the State of North Carolina designates the holiday (Friday or Monday). There shall be no instructional day or staff workday on this observed day.

If you have questions contact Alexis Schauss at 919.807.3708 or [aschauss@dpi.state.nc.us](mailto:aschauss@dpi.state.nc.us).

**(3) Statistical Profile for 2005:** The 2005 Statistical Profile is available on DPI's website at [www.ncpublicschools.org/fbs/stats/index.html](http://www.ncpublicschools.org/fbs/stats/index.html)

**(4) A Message From The North Carolina Department of Insurance:** The NC Department of Insurance Healthcare Review Program has available a service called "External Review" to help employees when their health insurance company denies coverage for services on the grounds that they are not medically necessary. Please see the attached message from the North Carolina Department of Insurance about this important consumer service. The message from the Department includes a link to the web site which provides detailed information about External Review Service. If you have questions about External Review please contact the Healthcare Review Program at 919-715-1163 or toll-free at 877-885-0231.

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**Newsletter No. 017-05/06, December 8, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**(1) Transportation Allotment Update:** The Dec. 1 transportation allotment adjustment data were mailed to local superintendents, transportation directors and finance officers. The actual allotment will be issued by the NCDPI's School Business Section to finance officers later this month. Over \$280 million dollars is allotted for transportation operations for 2005-06. The average transportation budget rating is about 94 percent. This allotment bases fuel on an average statewide price of \$1.05 per gallon. As of this week, the annual average price of fuel is \$2.04 (and, fortunately, falling). Additional fuel allotments will be issued to LEAs that have an adopted reduced idling policy that will be in place by Jan. 10. County and City LEAs should work together to make sure that EACH LEA has an adopted policy in order to ensure that the complete fuel allotment is received. For more information, please contact Derek Graham, NCDPI's Transportation Services Section, 919/807-3570, or by email, [dgraham@dpi.state.nc.us](mailto:dgraham@dpi.state.nc.us).

**(2) 2006 E-Rate Filing Window Announced:** The Schools and Libraries Division of USAC has announced that the Form 471 application filing window for 2006 E-Rate funding will open on Dec. 6, and close on Feb. 16. If you have not already done so, please file Form 470 to assure that the 28-day posting requirement is met. For more information, please contact Stephanie English, NCDPI's Monitoring and Compliance Section, at [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us), or 919/807-3686.

**(3) E-Rate for Schools:** Information on E-Rate can now be found on the NCDPI Financial and Business Services' Web page at [www.ncpublicschools.org/fbs/erate/index.html](http://www.ncpublicschools.org/fbs/erate/index.html). The archived video stream from the Nov. 14 E-Rate training conducted by John Noran of the Schools and Libraries Division of USAC is accessible from the above Web site. For additional information, contact Stephanie English, NCDPI's Monitoring and Compliance Section, at [senglish@dpi.state.nc.us](mailto:senglish@dpi.state.nc.us), or 919/807-3686.

**(4) REMINDER: UNEMPLOYMENT 2005 YEAR END BILLING:** You should have received your 2005 year end bill from the Employment Security Commission. Bills were mailed directly to the designated LEA Unemployment Insurance Coordinator. If you have not received these statements, they are available online via the ESC website. (see attached instructions)

The following information is due to DPI by 12/23/2005.

Unemployment Billing Instructions and a Worksheet for unemployment benefits are attached. Please download the attached excel worksheet onto your C Drive and use for each claimant's payroll funding allocations.

See 2005 Unemployment Billing-Year End Audit instructions for information on accessing 2005 charges and how to complete worksheets. There should be a worksheet completed for EACH name on the list.

DPI will not incur penalties levied upon schools for late payments. Please provide the requested information by the date requested. (12/23/05)

Please contact Tarsha Silver if you have any questions at 919-807-3521 or [lsilver@dpi.state.nc.us](mailto:lsilver@dpi.state.nc.us).

**(5) State Board Meeting Highlights:** Highlights of the December State Board of Education meeting held last week are available online by at <http://www.ncpublicschools.org/sbehighlights>.

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**Newsletter No. 018-05/06, December 21, 2005**

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Philip Price  
Associate State Superintendent  
Department of Public Instruction  
6326 Mail Service Center  
Raleigh, NC 27699-6326  
Email: [pprice@dpi.state.nc.us](mailto:pprice@dpi.state.nc.us)

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**I hope that each of you have a joyous and wonderful Christmas and a happy New Year!**

**Philip**

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**Mileage Rate Change:** Effective January 1, 2006, the Internal Revenue Service (IRS) has decreased the business standard mileage rate from 48.5 cents per mile to 44.5 cents per mile, as fuel prices have stabilized after Hurricane Katrina. See attached memorandum from David McKoy, Office of State Budget & Management dated December 20, 2005.

**REMINDER - VIF and Other Contracted Teachers:** VIF teachers and reemployed retirees are contracted teachers and are not required to be paid from the State Salary Schedule. Therefore, these teachers are not required to receive the raise that became effective in 5th pay period.

**REMINDER:** City and County LEA Boards of Education must adopt a reduced idling policy by January 10, 2006 in order to qualify for additional transportation funding for fuel during 2005-2006. As of Friday, December 9th 33 of 115 LEAs have submitted adopted policies to DPI Transportation Services. Questions should be directed to Derek Graham (919/807-3571) [dgraham@dpi.state.nc.us](mailto:dgraham@dpi.state.nc.us).

**Transportation Funding Formula Study Underway:** The contract for performing the study of the transportation funding formula has been awarded to Management Partnership Services (MPS), a Pennsylvania company that provides consulting services dealing with pupil transportation operations, municipal fleet management and facilities management. MPS consultants met Wednesday, December 14th with DPI Transportation Services staff, Ben Matthews and Philip Price to begin work on the project. MPS, in conjunction with TransTech Management (a Greensboro transportation consulting firm), will begin the project by surveying superintendents, finance officers and transportation directors regarding experiences and opinions regarding the current formula and its implementation. The on-line survey will be available January 9-13 followed by a series of feedback sessions according to the following TENTATIVE SCHEDULE: January 31 - Asheville; February 1 - Greensboro; February 2 - Smithfield. It is anticipated that these sessions will run from 9 a.m. til noon. Contact: Derek Graham (919/807-3571).

**SECU Scholarship:** For the second year, the State Board of Education is pleased to announce the State Employees Credit Union (SECU) Foundation "People to People" Scholarship Program for North Carolina public school seniors. Every North Carolina public high school will receive one scholarship valued at \$10,000 (payable at \$1,250 per semester) to attend one of the 16 constituent campuses of the University of North Carolina. An information packet for each school's Scholarship Selection Committees to use in meeting the SECU Foundation's April 21 deadline was sent to superintendents and high school principals last Thursday. Should you have questions regarding any of this information, please call Jane Worsham, State Board of Education Office, at 919/807-3400.

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