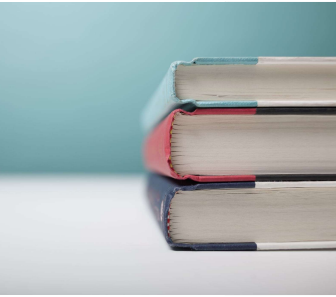**Slide 1**

How to Survive a Monitoring (Field) Review

Tips for Preparing for a Successful Monitoring Review

Chad Eggleston
&
Michael Thomas

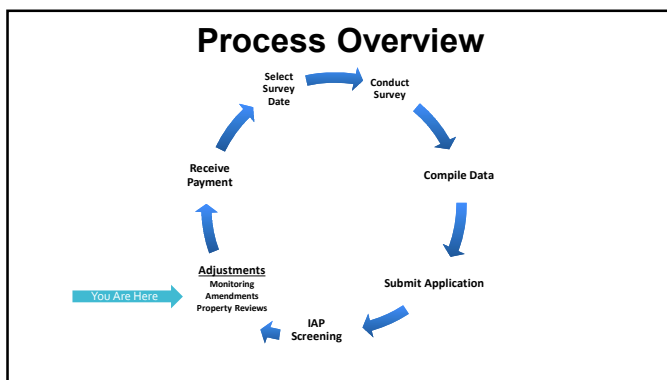NAFIS Conference
March 14, 2022

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Slide 2

Roadmap

A	What is Monitoring?
B	How Do I Know I Have Been Selected?
C	How Do I Prepare?
D	It's Submitted – Now What?

2

Slide 3

Process Overview

Select Survey Date → Conduct Survey → Compile Data → Submit Application → IAP Screening → Adjustments (Monitoring, Amendments, Property Reviews) → Receive Payment → (back to Select Survey Date)

You Are Here → Adjustments

3

Slide 4

What Are the Types of Monitoring?

Site Visit — OR → Virtual

We come to you!
➢ Documents are reviewed on site

You send documents to us!
➢ Documents are uploaded in IAGS
➢ Results are viewed in IAGS

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Slide 5

How am I Notified?

5

Slide 6

Notification of Monitoring?

- **Site Visit**
  ➢ Email notification from IAGS
  ➢ Login to view specific instructions

- **Virtual Review**
  ➢ Email Notification from IAGS
  ➢ Login to view link to monitoring letter

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Slide 7

How Do I Prepare?

7

Slide 8

Step 1 - Organize Your Data

Sort by Category	Sort Category by Property	Alphabetize By Child's Last Name	Note the numbers of each grouping

• Group military children that live on base together
• Group military children that do not live on base together
• Group LRH children together
• Group Indian lands children together
	• Group live on military on Ft. Sill together
	• Group live on military on Tinker AFB together
	• Group civilian parents that work on Ft. Sill together
		• Group live on military on Ft. Sill together
		  • Adams, John
		  • Cena, Jose
		  • Smith, Susy
			• Uploading by Category and Property
			• On-site groups of 50

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Slide 9

Categories

Federal Connection			
STUDENT	**PARENT**	**CATEGORY**	**WEIGHT**
Resides on federal property	Civilian who works on federal property in the LEA	A(i)	1.00
Resides on federal property	Foreign military officer and accredited foreign gov't official	A(ii)	1.00
Resides on federal property	Is in U.S. uniformed service	B	1.00
Resides on Indian Lands		C	1.25
Does not reside on federal property	Is in U.S. uniformed service	D(i)	0.20
Does not reside on federal property	Foreign military officer and accredited foreign gov't official	D(ii)	0.20
Resides in Low Rent Housing	Does not work on federal property	E	0.10
Resides on federal property	Civilian who does not work on federal property	F	0.05
Does not reside on federal property	Works on federal property in same county as LEA	G(i)	0.05
Does not reside on federal property	Works on federal property in same state as LEA	G(ii)	0.05

The categories above correspond to the categories you will see on your payment voucher. Each category of student has a specific weight when calculating final payments according to the Impact Aid law.
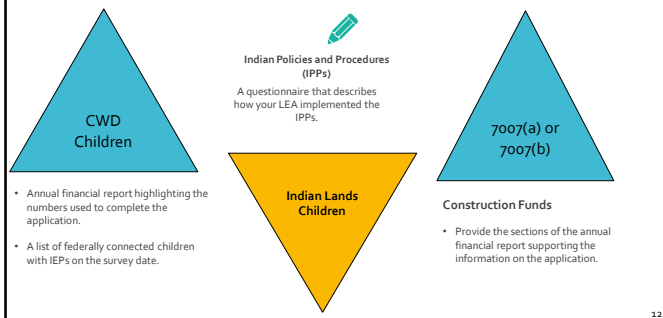
9

Slide 10

Step 2 – Other Documents?

All Monitoring -

1. **A report of your total membership.** This includes all of the children enrolled in your school district ON THE SURVEY DATE.

2. **A report of your tuition-in children.** The number of children for which the LEA **RECEIVES** a tuition payment.

3. **A report of your tuition-out children.** The number of children for which the LEA **PAYS** another LEA to educate.

4. **Average Daily Attendance Data.** If your LEA used actual ADA or sampled ADA, and included summer school – provide a report showing the hours of summer school attendance and a report showing total days of instruction.

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Slide 11

Case By Case Documents

CWD Children
- Annual financial report highlighting the numbers used to complete the application.
- A list of federally connected children with IEPs on the survey date.

Indian Policies and Procedures (IPPs)
A questionnaire that describes how your LEA implemented the IPPs.

Indian Lands Children

7007(a) or 7007(b)

Construction Funds
- Provide the sections of the annual financial report supporting the information on the application.

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Slide 12

How Long Do I Have to Prepare?

The notification letter will specify how long you have to submit your data. It is typically 30 days.

30 Days?! Oh NO! -- What if I need more time? Your analyst may grant you an additional week at their discretion.

LEAs that fail to submit will be made ineligible.

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How Do I Provide Documents

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Virtual Reviews

LEAs will upload the documents in the IAGS.

Need help? See the User Guide.

- **https://impactaid.ed.gov/Training**

You will be able to upload many common document types, such as PDF, Word and Excel. There will be no size limits for the files.

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We Have Given You All the Data – What Now?

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After the Submission

1. Your analyst will review your data and record the findings in IAGS.

2. You will receive an email instructing you to log into IAGS to review the report.

3. You will have 60 days from the notice to provide any additional or corrected data to your analyst.

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Most Common Mistakes

● FY 2020 Number of Children

Errors	# of children
F&G Eligibility	3,877
No Supporting Documentation	2,463
Incomplete Forms	1,663
Missing DOB	1,401
Ineligible Property	1,216
Source Check Certification	1,132

● FY 2020 Number of LEAs

Errors	# of LEAs
F&G Eligibility	23
IEP Dates	20
National Guard Missing Orders	20
No Supporting Documentation	19
PPS Missing Information	16
PPS Missing Signature Date	15

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Most Common Mistakes

- Incomplete forms. Parent Pupil Survey Forms must have complete information. If any information is missing or incomplete, you will not be paid for those children.
- Missing Certifications for Source Checks. Please see
  http://impactaid.ed.gov/resources
- Providing an IEP date that is not active on the survey date.
  - Provide the IEP dates that were active on the survey date.
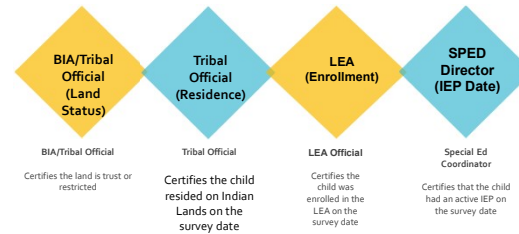- Missing National Guard/Reserve Orders.

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Most Common Mistakes Con't

- Claiming ineligible properties year after year

- Using the wrong source check for the category claimed

- Failing to provide everything on the checklist

- Claiming ineligible low rent housing

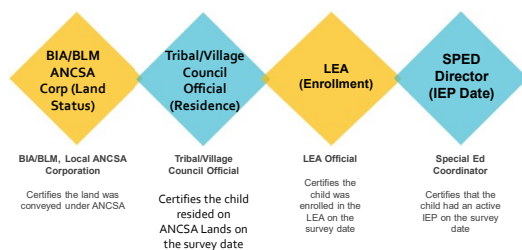- Failure to respond in a timely manner
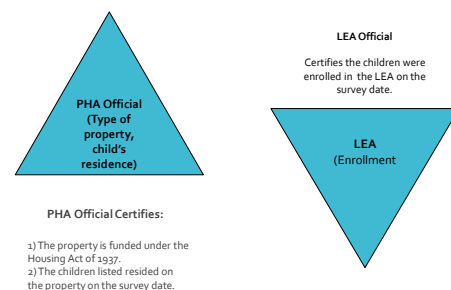
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Trust and Restricted Certifications

BIA/Tribal Official (Land Status)

BIA/Tribal Official

Certifies the land is trust or restricted

Tribal Official (Residence)

Tribal Official

Certifies the child resided on Indian Lands on the survey date

LEA (Enrollment)

LEA Official

Certifies the child was enrolled in the LEA on the survey date

SPED Director (IEP Date)

Special Ed Coordinator

Certifies that the child had an active IEP on the survey date

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ANCSA Certifications

BIA/BLM ANCSA Corp (Land Status)

BIA/BLM, Local ANCSA Corporation

Certifies the land was conveyed under ANCSA

Tribal/Village Council Official (Residence)

Tribal/Village Council Official

Certifies the child resided on ANCSA Lands on the survey date

LEA (Enrollment)

LEA Official

Certifies the child was enrolled in the LEA on the survey date

SPED Director (IEP Date)

Special Ed Coordinator

Certifies that the child had an active IEP on the survey date

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Low Rent Housing Certification

PHA Official (Type of property, child's residence)

PHA Official Certifies:

1) The property is funded under the Housing Act of 1937.
2) The children listed resided on the property on the survey date.

LEA Official

Certifies the children were enrolled in the LEA on the survey date.

LEA (Enrollment)

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Low Rent Housing

- **ONLY traditional public housing funded under the Housing Act of 1937 is eligible for Impact Aid**
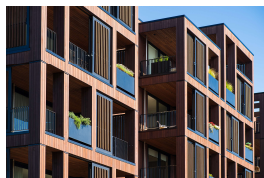
DO NOT include Annual Contributions Contract (ACC), Housing Choice Voucher Program (HCVP), Residential Assistance Demonstration (RAD), Section 8, Low Income Tax Credit (LITC) Housing, Market Rate housing, or privately-owned housing.

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Questions?

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Thank you!

- **IMPACT AID PROGRAM**
- 202-260-1357
- IMPACT.AID@ED.GOV
- https://impactaid.ed.gov/resources

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