

2022-2023

# New Charter Leaders' Tasks List

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Beginning Teacher Support Program

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Task Name	Task Description	Timeline for Completion	Contact Person
<b>Beginning Teacher Support Program</b>			

## New Charter Schools' Tasks List for Opening in 2022

Beginning Teacher Support Program Plan (BTSP)	As required by SBE Policy TCED-016, each PSU must have an approved Beginning Teacher Support Program Plan on file. The plan must meet policy requirements and be approved by the local board and DPI. A template is available for developing a BTSP Plan.	Prior to Opening	Dr. Monica Shepherd <a href="mailto:monica.shepherd@dpi.nc.gov">monica.shepherd@dpi.nc.gov</a> 336-469-4682
<b>DHHS: Division of Public Health – Children and Youth Branch</b>			
OPTIONAL: Hire a School Nurse	Make sure your school nurse is available to serve the entire student population and has the appropriate credentials. A person with a Registered Nurse (RN) license is preferred.	Recommended by August 1	<b><i>For Questions about Nurse Credentials Only:</i></b> Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Offer Generalized Diabetes Training	If you have students receiving assistance at school related to diabetes (for all school staff providing education or care for students with diabetes)	Recommended by the <b>first day of school</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Offer Intensive Diabetes Training	If you have students receiving assistance at school related to diabetes (for <b>at least 2 staff persons</b> involved in the care of specific students)	Recommended by the <b>first day of school</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson

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			West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Complete diabetes care plans	If you have students receiving assistance at school related to diabetes...Plans should be completed by the school nurse or other recognized medical professional.	Recommended by the <b>first day of school</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Acquire Epi Pens	<b>At least 2 epinephrine auto-injectors</b> should be on hand.	Recommended by the <b>first day of school</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Offer Epi Pen Training	At least 1 person must receive training in the use of emergency epinephrine.	Recommended by the <b>first day of school</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526

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Task Name	Task Description	Timeline for Completion	Contact Person
Develop a concussion plan	This plan must address the needs of students in any grade level suffering from concussions.	Recommended by <b>September 30th</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Appoint a Team for Return-to-Learn	This team is responsible for identifying the return-to-learn or play needs of a student who has suffered a concussion.	Recommended by <b>September 30th</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Provide Staff Development on Concussions	This training is for all teachers and other school personnel in order to support and assist students who have sustained a concussion.	Recommended by <b>September 30th</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Student Health History Update	Include a question on the student health history and emergency <b>medical update related to any head</b>	Recommended by <b>May 1</b>	Annette Richardson East(Districts 1-4)

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	injury/concussion a student may have incurred during the past year.		<a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
Provide required information to parents according to <a href="#">G.S. 115C-218.75(a)</a> . This should be on your website and in your handbook	<p><b>All Grade Levels:</b> Meningococcal Meningitis &amp; Flu</p> <p><b>Grades 5 – 12:</b> Cervical Cancer, Cervical Dysplasia, Human Papillomavirus</p> <p><b>Grades 7-12:</b> Preventable Risks for Pre-Term Births</p> <p><b>Grades 9-12:</b> Lawful Abandonment of a Newborn</p>	At the <b>Beginning of the School Year</b>	Annette Richardson East(Districts 1-4) <a href="mailto:annette.richardson@dhhs.nc.gov">annette.richardson@dhhs.nc.gov</a> 252-339-3009 or Amy Johnson West (Districts 5-8) <a href="mailto:amy.t.johnson@dhhs.nc.gov">amy.t.johnson@dhhs.nc.gov</a> 336-813-1526
<b>DHHS: Division of Public Health, Environment Health Section</b>			
<a href="#">Asbestos in School Rule</a>	<ul style="list-style-type: none"> <li>All buildings <b>Must be</b> tested for asbestos or submit the building's architect letter stating no asbestos used in the building during construction.</li> <li><a href="#">Occupational and Environmental Epidemiology: Health Hazards Control</a></li> <li><a href="#">NC DPH: Occupational and Environmental Epidemiology: Health Hazards Control</a></li> </ul>	Asbestos Management Plan <b>Received by NC DPH HHCU prior to that school building opening for school business</b>	James Lueck Industrial Hygiene Consultant Division of Public Health, Environmental Health Section Health Hazards Control Unit N.C. Department of Health Human Services (919) 707-5975 / 5950 (Office) (919) 870-4808 (Fax) Email: <a href="mailto:James.Lueck@dhhs.nc.gov">James.Lueck@dhhs.nc.gov</a>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>

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<b>Division of School Business</b>			
CSADM Phase II Final Verification	Phase II submission is required for new charters approved by the State Board of Education to open July 1, 2022. It displays the projected enrollment as indicated in the charter's application. The projected enrollment number will be used for the first installment of the annual allotment and will be the maximum actual ADM that the charter school may be funded on for the current school year.	<b>June 1 – 12</b>	amanda.cruz@dpi.nc.gov
<a href="#">EDDIE</a>	Complete and update school data  EDDIE information: <a href="https://www.dpi.nc.gov/districts-schools/district-operations/financial-and-business-services/demographics-and-finances/eddie">https://www.dpi.nc.gov/districts-schools/district-operations/financial-and-business-services/demographics-and-finances/eddie</a>	<b>July 7 or before PowerSchool completes end-of-year process</b>	Nicola Lefler <a href="mailto:nicola.lefler@dpi.nc.gov">nicola.lefler@dpi.nc.gov</a> 984-236-2457
<a href="#">Internal Revenue Services (IRS) Tax Exempt Status</a>	Apply for Tax Exempt Status as Charitable, Religious and Educational Organization (501(c)(3)) status	Per charter agreement and SBE policy	RS Tax Exempt and Government Entities Customer Account Services at (877) 829-5500 (toll-free number)
IRS Annual Exempt Organization Returns	In general, exempt organizations are required to file annual returns, although there are exceptions. If an organization does not file a required return or files late, the IRS may assess penalties. In addition, if an organization does not file as required for three consecutive years, it automatically loses its tax-exempt status.	<b>November 15th for FYE June 30</b>	RS Tax Exempt and Government Entities Customer Account Services at (877) 829-5500 (toll-free number)
Financial Management System	Per General Statute, SBE policy, federal requirements, Uniform Education Reporting System (UERS), Chart of Accounts (COA), School Reporting, etc.	<b>Prior to receipt of public funds</b>	Roxane L. Bernard School Financial Reporting Section North Carolina Department of Public Instruction Phone: (984) 236-2460 Email: <a href="mailto:roxane.bernard@dpi.nc.gov">roxane.bernard@dpi.nc.gov</a>

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			Gwendolyn Tucker <a href="mailto:gwendolyn.tucker@dpi.nc.gov">gwendolyn.tucker@dpi.nc.gov</a> 984-236-2458
<a href="#">Fiscal Management Policies and Procedures</a>	Part of Financial Management System - Development and approval of comprehensive fiscal management policies and procedures clarifying authority over the school's financial affairs, internal controls, accounting practices, purchasing, segregation of duties, and other related practices.	Prior to receipt of public funds	David A. Isgett, Lead Fiscal Monitor NC DPI – Internal Audit – Monitoring and Compliance Division, 6334 Mail Service Center, Raleigh, NC 27699-6336 (984) 236-2442 (office) <a href="mailto:David.Isgett@dpi.nc.gov">David.Isgett@dpi.nc.gov</a>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
Annual Audit - Charter School Audit Contract Form (LGC-205)	Submission to the Local Government Commission State and Local Government Finance Division for approval by the Secretary of the LGC.  <a href="https://www.nctreasurer.com/state-and-local-government-finance-division/local-government-commission/local-fiscal-management">https://www.nctreasurer.com/state-and-local-government-finance-division/local-government-commission/local-fiscal-management</a>	<b>August</b>	NC Department of State Treasurer Local Fiscal Management section at (919) 814-4300. <a href="mailto:SLGFD@nctreasurer.com">SLGFD@nctreasurer.com</a> Also, see Annual Audit Forms and Resources at <a href="https://www.nctreasurer.com/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx">https://www.nctreasurer.com/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx</a>
Annual Audit - Invoices	Submission and approval by the Secretary of the LGC pursuant to GS 115C-447.	Prior to payment	NC Department of State Treasurer Local Fiscal Management section at (919) 814-4300. <a href="mailto:SLGFD@nctreasurer.com">SLGFD@nctreasurer.com</a> Also, see Annual Audit Forms and Resources at <a href="https://www.nctreasurer.com">https://www.nctreasurer.com</a>



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			<a href="https://www.nctreasurer.com/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx">/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx</a>
Amended Audit Contracts	If an audit cannot be completed by the due date or if the fees in the original contract are modified, an Amended Contract Form (Amended LGC-205) must be filed.	<b>December 1</b>	NC Department of State Treasurer Local Fiscal Management section at (919) 814-4300. <a href="mailto:SLGFD@nctreasurer.com">SLGFD@nctreasurer.com</a> Also , see Annual Audit Forms and Resources at <a href="https://www.nctreasurer.com/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx">https://www.nctreasurer.com/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx</a>
Annual Audit - Audited Financial Statements to LGC	Submission to the Local Government Commission State and Local Government Finance Division	<b>October 31</b>	NC Department of State Treasurer Local Fiscal Management section at (919) 814-4300. <a href="mailto:SLGFD@nctreasurer.com">SLGFD@nctreasurer.com</a> Also , see Annual Audit Forms and Resources at <a href="https://www.nctreasurer.com/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx">https://www.nctreasurer.com/slg/lfm/forms-instructions/Pages/Annual-Audit-Forms-and-Resources.aspx</a>
State and Local Government Memo Listing	Bookmark and review regularly for applicable memos.	Ongoing	<a href="https://www.nctreasurer.com/slg/Pages/MemosList.aspx">https://www.nctreasurer.com/slg/Pages/MemosList.aspx</a>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>

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Single Audit (required if expend \$750,000 or more in federal awards)	Submission to the Federal Audit Clearinghouse (FAC) Internet Data Entry System (IDES)	30 days after receipt of the auditor's report(s), or 9 months after the end of the fiscal year — whichever comes first.	866-306-8779 <a href="https://harvester.census.gov/facweb/resources.aspx">https://harvester.census.gov/facweb/resources.aspx</a> ; <a href="https://harvester.census.gov/facides/Account/Login.aspx">https://harvester.census.gov/facides/Account/Login.aspx</a>
SAM.gov registration	Active registration for any entity to do business with the Federal Government	Prior to applying for and/or accepting Federal awards.	<a href="http://www.SAM.gov">www.SAM.gov</a>
Dun & Bradstreet Number	Required for SAM.gov registration.	Prior to registering in SAM.gov	<a href="https://fedgov.dnb.com/webform/">https://fedgov.dnb.com/webform/</a>
<a href="#">Charter School Financial Manual</a>	<b>Read the manual. Again, read the manual, all of it.</b>	<b>Prior to School Opening</b>	<a href="https://www.dpi.nc.gov/districts-schools/district-operations/financial-and-business-services/independent-public-schools-operations#procedures-and-guidance">https://www.dpi.nc.gov/districts-schools/district-operations/financial-and-business-services/independent-public-schools-operations#procedures-and-guidance</a>
New Charter School Training	<a href="#">SBE Policy CHTR-006</a> states that charter schools must attend required financial training. Attend Cash Management Training to review cash and MSA systems and to review monthly financial reports.	Training sessions <b>April or May</b> before the school opens	Roxane L. Bernard School Financial Reporting Section North Carolina Department of Public Instruction Phone: (984) 236-2460 Email: <a href="mailto:roxane.bernard@dpi.nc.gov">roxane.bernard@dpi.nc.gov</a>
<b>LINQ Training/subject to change</b>	Complete training on the LINQ software. LINQ is the software vendor that assists the charter schools in uploading their monthly general ledger to DPI. The software is used to record expenditures and revenue (the general ledger).	<b>Prior to School Opening</b>	Tammi Mixen <a href="mailto:tmixen@linq.com">tmixen@linq.com</a> 800.541.8999  LINQ Customer Support and Training for New Charters:

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			Kevin Kelly <a href="mailto:kkelly@linq.com">kkelly@linq.com</a> Director LINQ Customer Care
Task Name	Task Description	Timeline for Completion	Contact Person
<b>Educator Recruitment &amp; Support Division</b>			
EVAAS Administrator	Establish a district EVAAS Administrator by contacting Joseph Foster by email.	By November	Joseph Foster <a href="mailto:joseph.foster@dpi.nc.gov">joseph.foster@dpi.nc.gov</a> 984-236-2113
HR Listserv & <a href="#">HR Division</a>	The person primarily responsible for Human Resources policies at the school should join the HR Listserv by emailing Tom Tomberlin.	At your discretion	Tom Tomberlin <a href="mailto:thomas.tomberlin@dpi.nc.gov">thomas.tomberlin@dpi.nc.gov</a> v 984-236-2114
<b>English Learners</b>			
<i>Note the Performance Framework Requirement: A5 – EL Component.</i>			
Task Name	Task Description	Timeline for Completion	Contact Person
Access to WIDA Secure Portal and WIDA AMS Accounts	Ensure the school testing coordinator has access to these accounts. These are critical for the EL identification window (30 days upon student enrollment). The testing coordinator and the EL coordinator/designee may have access to these accounts and should have completed the screener training in the online secure portal. WIDA accounts should also be created for a teacher(s) assigned to be the test administrator for the annual language proficiency assessments ACCESS for ELLs/Alternate ACCESS for ELLs.	<b>Before school starts</b>	Regional Accountability Coordinator assigned to your SBE Education District.
Home Language Survey (HLS) Review	Review all enrolled students' HLS to identify students who may need to be screened using the WIDA Screener for language services.	Ongoing	Susan Walz <a href="mailto:susan.walz@dpi.nc.gov">susan.walz@dpi.nc.gov</a> 984-236-2847

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EL Data PowerSchool Updates	The data manager should have EL Coordinator rights in PowerSchool in order to complete EL Data Records.	Ongoing	Susan Walz <a href="mailto:susan.walz@dpi.nc.gov">susan.walz@dpi.nc.gov</a> 984-236-2847
EL Headcount Report	A report that provides the headcount for students identified as English Learners (ELs) in NC Schools enrolled by October 1 of each year. This report is submitted to the Joint Legislative Education Oversight Committee by December of each year.	<b>Due November 1, 2022 for all students enrolled by 10/1 and identified in PowerSchool as ELs.</b>	Stacy Daniel <a href="mailto:stacy.daniel@dpi.nc.gov">stacy.daniel@dpi.nc.gov</a> 984-236-2829  Susan Walz <a href="mailto:susan.walz@dpi.nc.gov">susan.walz@dpi.nc.gov</a> 984-236-2847
Immigrant Children & Youth Headcount Report October 2022	NC allocates a portion of funding to PSUs based upon the share of immigrant children and youth in the state. The term "immigrant children and youth," which is defined in section 3201(5) of Title III, refers to individuals who: (A) are aged 3 through 21; (B) were not born in any State; and (C) have not been attending one or more schools in any one or more States for more than 3 full academic years.	<b>Due October 7, 2022, for all students enrolled by 10/1 and identified in PowerSchool as immigrants by October 7th.</b>	Stacy Daniel <a href="mailto:stacy.daniel@dpi.nc.gov">stacy.daniel@dpi.nc.gov</a> 984-236-2829  Susan Walz <a href="mailto:susan.walz@dpi.nc.gov">susan.walz@dpi.nc.gov</a> 984-236-2847
Language Instruction Educational Plan (LIEP)	Complete the LIEP based on your school's needs and resources following the guidance, template, and samples provided on the English Language Development (ELD) website. Link: <a href="https://bit.ly/NCELSWebsite">bit.ly/NCELSWebsite</a> <a href="#">ESL/Title III - Charter Schools (CS)</a>	<b>Submit the LIEP service chart by September 30 through Epicenter.</b>  Epicenter Support <a href="mailto:Joseph.Letterio@dpi.nc.gov">Joseph.Letterio@dpi.nc.gov</a>	<b>ESL/Title III Consultant assigned to your area in the state:</b> West (SBE Districts 5-8) <a href="mailto:Ivanna.Anderson@dpi.nc.gov">Ivanna.Anderson@dpi.nc.gov</a> 984-236-2828  East (SBE Districts 1-4) <a href="mailto:Xatli.Stox@dpi.nc.gov">Xatli.Stox@dpi.nc.gov</a> 984-236-2834
Become familiar with federal and state documentation to support English Learners	Review these links: <ul style="list-style-type: none"> <li>● <a href="#">Schools' Civil Rights Obligations to English Learners and their families</a></li> <li>● <a href="#">US Department of Education, OELA English Learner Tool Kit</a></li> <li>● <a href="#">US Department of Education, OELA Newcomer Tool Kit</a></li> </ul>	Ongoing	<b>ESL/Title III Consultant assigned to your area in the state:</b>  West (SBE Districts 5-8) <a href="mailto:Ivanna.Anderson@dpi.nc.gov">Ivanna.Anderson@dpi.nc.gov</a> 984-236-2828

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	<ul style="list-style-type: none"> <li><a href="#">US Department of Education, NCELA English Learner Family Tool Kit</a></li> </ul>		East (SBE Districts 1-4) <a href="mailto:Xatli.Stox@dpi.nc.gov">Xatli.Stox@dpi.nc.gov</a> 984-236-2834
<b>Exceptional Children Division</b>			
EC Director needs to reach out to Regional Coordinator	Call and talk with your <a href="#">Regional Coordinator</a> to introduce yourself and to ask questions regarding steps moving forward. <b>E</b>	August 30	<b>EC Charter School Regional Coordinators:</b>  Lynn Metcalf Northwest, West, Southwest <a href="mailto:Lynn.Metcalf@dpi.nc.gov">Lynn.Metcalf@dpi.nc.gov</a> 984-236-2599  Michelle Hamm Northeast, Southeast, Sandhills <a href="mailto:michelle.hamm@dpi.nc.gov">michelle.hamm@dpi.nc.gov</a> 984-236-2565  Robert McOuat Piedmont-Triad, North Central <a href="mailto:robert.mcouat@dpi.nc.gov">robert.mcouat@dpi.nc.gov</a> 336-416-1695
611 Grant Training	Attend 611 grant training if available.	Tentatively scheduled for October 31	EC Charter School Regional Coordinator (see list above)
Complete the 611 Grant	Using information from the grant training, complete and submit the 611 Grant.	Tentatively scheduled for December	EC Charter School Regional Coordinator (see list above)
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
Establish NCID # and <a href="#">ECATS</a> login	Work with your HR/Principal to get an NCID number so you can submit Child Count Transfer (EC Director and Principal) and ensure you're an established user in <a href="#">ECATS</a> (EC Directors)	August 30	HR/Principal of Charter School  Charter School EC Coordinator

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Complete child count transfer	Input new student information into system to receive funding Deadline: <b>By the 10th of the following month after the child is first enrolled during the first 60 days of the school year</b>	See deadline notes to the left.	Melissa Dearman <a href="mailto:Melissa.Dearman@dpi.nc.gov">Melissa.Dearman@dpi.nc.gov</a> 984-236-2444
Prepare for December 1 Child Count	Maintain current IEP/eligibility for all students. <b>Ensure students are in ECATS.</b> Run reports as needed to double check.	Daily/Weekly	Charter School EC Coordinator
<b>Federal Programs</b>			
Access to the Comprehensive Continuous Improvement Process (CCIP)	Online grants management system that houses the federal consolidated application	End of September for new charters	Eastern Charters - Dr. Tina Hinson <a href="mailto:tina.hinson@dpi.nc.gov">tina.hinson@dpi.nc.gov</a> 984.236.2803  Western Charters - James Popp <a href="mailto:james.popp@dpi.nc.gov">james.popp@dpi.nc.gov</a> 984.236.2801
Eligible School Summary Report (ESSR) in Power School	This report collects the total number of students enrolled in the school, total number of low-income students, the Title I program that will be operated, and CEP participation. This report is usually completed in May to prepare for the upcoming school year.	End of September for new charters	Eastern Charters - Dr. Tina Hinson <a href="mailto:tina.hinson@dpi.nc.gov">tina.hinson@dpi.nc.gov</a> 984.236.2803 Western Charters- James Popp <a href="mailto:james.popp@dpi.nc.gov">james.popp@dpi.nc.gov</a> 984.236.2801
<b>Homeless Children and Youth</b>			
<p><i>The following tasks are required under Subtitle VII-B of the McKinney-Vento Homeless Assistance Act and are outlined in the NCDPI State Plan. For more information visit: <a href="https://uscode.house.gov/view.xhtml?path=/prelim@title42/chapter119&amp;edition=prelim">https://uscode.house.gov/view.xhtml?path=/prelim@title42/chapter119&amp;edition=prelim</a> as well as <a href="https://www.dpi.nc.gov/districts-schools/federal-program-monitoring">https://www.dpi.nc.gov/districts-schools/federal-program-monitoring</a>.</i></p>			
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Resource</b>
Appoint Homeless Liaison	Every LEA, whether or not it receives a McKinney-Vento subgrant, is required to designate a local liaison.	<b>Prior to opening day of school</b>	<a href="#">McKinney-Vento Homeless Assistance Act</a>

## New Charter Schools' Tasks List for Opening in 2022

Register/Update Homeless Program	Register the homeless liaison with the North Carolina Homeless Education Program (NCHEP). Access to listservs, emails and other program requirements will be sent regularly.	Prior to opening day of school	<a href="#">Liaison Contact Information Submission Form</a>
Public Posting of Program Information	District website must post contact information for the homeless liaison, a brief description of the law including student rights, and a link to NCHEP. The link should be submitted to NCHEP via the provided portal link and updated as needed.	Prior to opening day of school	<a href="#">LEA McKinney-Vento Posting Submission Link</a>
New Homeless Liaison Training	Attend training that will provide specific details on the law, best practices, resources and the requirements of charter schools.	September	<a href="#">NCHEP Local Liaison Web Page</a>
Compliance Forum	Attend the required forum for all homeless liaisons to ensure compliance with program requirements under the McKinney-Vento Act.	TBD, annually	<a href="#">NCHEP Local Liaison Web Page</a>
Data Collection	All charter schools are required to enter a student identified into the "homeless" page in PowerSchool (PS). Each year, the liaison must certify the count in PS, even if no identification of a student was made. Data collection is required by the U.S. Department of Education.	TBD , annually	<a href="#">NCHEP Data Collection Resource Page</a>
Needs Assessment	Annual needs assessment completed on the data and activities conducted to ensure that the charter school program is identifying and meeting the needs of homeless children and youth. Needs assessments are maintained at the charter school for review during program monitoring. New charters are required to submit their initial results to NCHEP during the first year of the school being opened. Charter schools with identifications above 50 students should contact their Program Specialist to discuss an alternative template.	End of August; update annually	<a href="#">NCHEP Local Liaison Web Page</a>
Dispute Resolution Policy	All LEAs are required to have an LEA dispute resolution policy that aligns with the NC State Dispute Resolution Policy.	End of August; update annually	<a href="#">NC Dispute Resolution Policy</a>

## New Charter Schools' Tasks List for Opening in 2022

<p>Questions on any of these activities or resources, as well as other technical support can be directed to your <a href="#">regional NCHPEP Program Specialist</a> or the <a href="#">NC State Coordinator for Homeless Education</a>.</p>			
<b>Office of Early Learning Division</b>			
Contact Office of Early Learning Division	<ul style="list-style-type: none"> <li>Identify a Read to Achieve (RtA) contact for the school. This person will be the point of contact between the K-3 Literacy division and the charter school. Contact <a href="mailto:tonia.parrish@dpi.nc.gov">tonia.parrish@dpi.nc.gov</a> to be added to the RtA Contact list.</li> <li>Visit the <a href="#">RtA Repository</a> for helpful information about K-3 Literacy and Read to Achieve</li> </ul>	<b>Upon Opening</b>	<p>Tonia Parrish  <a href="mailto:tonia.parrish@dpi.nc.gov">tonia.parrish@dpi.nc.gov</a>            919-796-6926</p>
<b>Division of Academic Standards</b>			
All areas	<ul style="list-style-type: none"> <li>Visit the NCDPI website: <a href="https://www.dpi.nc.gov/">https://www.dpi.nc.gov/</a> to access the K-12 <a href="#">Standard Course of Study</a>, as well as <a href="#">programs and initiatives</a> and other relevant information. Here you also will find support materials, training opportunities, and other helpful information for each area.</li> <li>Sign up for updates from a variety of areas at the <a href="#">NC Public School NC Department of Public Instruction web site</a>:   <a href="https://www.dpi.nc.gov">https://www.dpi.nc.gov</a> <ul style="list-style-type: none"> <li><a href="#">NC Standard Course of Study (direct link)</a></li> <li><a href="#">Programs and Initiatives (direct link)</a></li> </ul> </li> </ul>	Ongoing	<p>Dr. Mary Hemphill-Joseph            Director of Academic Standards            North Carolina Department of Public Instruction            984-236-2755 <b>*NEW NUMBER*</b>  <a href="mailto:mary.hemphill@dpi.nc.gov">mary.hemphill@dpi.nc.gov</a></p> <p>***Contact <a href="mailto:amy.betsill@dpi.nc.gov">amy.betsill@dpi.nc.gov</a> to be added to the C and I Leaders listserv.</p>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
Oct. 1 EL Headcount Report – Oct. 2022	A report that provides the headcount for English Learners (ELs) enrolled in North Carolina Public Schools as of October 1 each year. This report is to be submitted to the Joint Legislative Education Oversight Committee by December 15 of eachF year.	Due November 1; goes to the SBE and JLEOC in December	<p>Stacy Daniel  <a href="mailto:stacy.daniel@dpi.nc.gov">stacy.daniel@dpi.nc.gov</a>            984-236-2829</p> <p>Susan Walz  <a href="mailto:susan.walz@dpi.nc.gov">susan.walz@dpi.nc.gov</a></p>



## New Charter Schools' Tasks List for Opening in 2022

			984-236-2847
Cursive and Multiplication Report	Districts and charter schools are asked to complete a survey regarding the measures taken by each LEA/school to implement the requirements regarding cursive writing and memorization of the multiplication tables pursuant to § 115C-81.81 instruction of cursive writing in grades 3-5 and the memorization of multiplication facts. This survey informs a report due to the JLEOC each March.	Survey: November - January  Report goes to the SBE in February	Stacy Daniel <a href="mailto:stacy.daniel@dpi.nc.gov">stacy.daniel@dpi.nc.gov</a>
Advanced Math standards implementation	Installation of 4th level math standards in the 2020-21 SY; implementation in 2021-22 SY; For additional information on the Advanced Math standards, please visit the most recent webinar - <a href="#">Scheduling NC Mathematics Courses</a>	2021-22 SY	Beverly Vance <a href="mailto:beverly.vance@dpi.nc.gov">beverly.vance@dpi.nc.gov</a>
<b>Optional:</b> Implement CCRG legislation requirements for Math and English	Statewide implementation in all high schools required in 2021-22 SY (CCRG stands for Career and College Ready Graduates)	Beginning 2021-22 SY	David Stegall <a href="mailto:david.stegall@dpi.nc.gov">david.stegall@dpi.nc.gov</a>
<b>Advanced Learning and Gifted Education</b>			
Local AIG Plan 2022-2025	<ul style="list-style-type: none"> <li>• This is an <b>option</b> for charter schools.</li> <li>• To have the ability to identify AIG students officially, <b>charters must have a Local AIG Plan submitted first.</b></li> <li>• Contact one of the State Consultants in Advanced Learning and Gifted Education for listserv inclusion and next steps.</li> <li>• Visit <a href="#">AIG website</a> in the Advanced Learning and Gifted Education website for an introduction.</li> </ul>	Beginning 2021-22 SY	Beth Cross <a href="mailto:beth.cross@dpi.nc.gov">beth.cross@dpi.nc.gov</a> Stephanie Cyrus <a href="mailto:stephanie.cyrus@dpi.nc.gov">stephanie.cyrus@dpi.nc.gov</a>
Optional: Advanced Placement (AP)/ International Baccalaureate (IB) / Cambridge (CIE)	<ul style="list-style-type: none"> <li>• College-level courses offered in high school prepare students for post-secondary study.</li> <li>• Contact the State Consultant in Advanced Learning and Gifted Education for listserv inclusion and next steps.</li> </ul>	Beginning 2021-2022 SY	Beth Cross <a href="mailto:beth.cross@dpi.nc.gov">beth.cross@dpi.nc.gov</a>

## New Charter Schools' Tasks List for Opening in 2022

	<ul style="list-style-type: none"> <li>Visit the <a href="#">Advanced Coursework page</a> on the Advanced Learning and Gifted Education website for an introduction.</li> </ul>		
<b>Career and College Promise</b>			
<p><b>OPTIONAL:</b> Develop MOU with college partner(s)</p>	<p><b>Career and College Promise (CCP)</b> is North Carolina's dual enrollment program for high school students, allowing eligible NC high school students to enroll in college classes at NC community colleges through their high school. Career &amp; College Promise offers charter school students the option to choose from two pathways: College Transfer and Career and Technical Education.</p> <p>Information and resources available on the <a href="#">NCDPI CCP Website</a>:</p> <ul style="list-style-type: none"> <li><a href="#">CCP Advising Guidance for School Personnel</a></li> <li><a href="#">Dual Credit Allowances Chart</a></li> </ul> <p>Develop a Memorandum of Understanding (MOU) clarifying procedures for dual enrollment through the Career and College Promise Program.</p>	Before registering students for dual enrollment	Isaac Lake <a href="mailto:isaac.lake@dpi.nc.gov">isaac.lake@dpi.nc.gov</a> 984-236-2738
<b>Licensure Section</b>			
50% Teacher Licensure	Charter schools are required to have <b>50% of their teachers licensed in the area in which they are teaching</b> . The Licensure application process can take 4-6 weeks at non-peak times and 6-8 weeks at peak times (April, May, and December).	December 31, annually	<a href="http://www.dpi.nc.gov/educators/educators-licensure">http://www.dpi.nc.gov/educators/educators-licensure</a>  Licensure Specialists <a href="mailto:asklicensure@dpi.nc.gov">asklicensure@dpi.nc.gov</a> 919-716-1800  <a href="mailto:nadine.ejire@dpi.nc.gov">nadine.ejire@dpi.nc.gov</a>
Review Licensure Policies	Review State Board of Education Policies LICN 001-0021.	Ongoing	<a href="http://www.dpi.nc.gov/educators/educators-licensure">http://www.dpi.nc.gov/educators/educators-licensure</a>

## New Charter Schools' Tasks List for Opening in 2022

	Go to the licensure website: <a href="http://www.dpi.nc.gov/educators/educators-licensure">http://www.dpi.nc.gov/educators/educators-licensure</a>		<a href="https://ralc.us/contact/">https://ralc.us/contact/</a>  Licensure Specialists <a href="mailto:asklicensure@dpi.nc.gov">asklicensure@dpi.nc.gov</a> 919-716-1800
Review Licensure Laws	Review G.S. 115C-296, Session Law 599, and Session Law 621.  Go to the licensure website: <a href="http://www.dpi.nc.gov/educators/educators-licensure">http://www.dpi.nc.gov/educators/educators-licensure</a>	Ongoing	<a href="http://www.dpi.nc.gov/educators/educators-licensure">http://www.dpi.nc.gov/educators/educators-licensure</a>  <a href="https://ralc.us/contact/">https://ralc.us/contact/</a>  Licensure Specialists: 919-716-1800 <a href="mailto:asklicensure@dpi.nc.gov">asklicensure@dpi.nc.gov</a>
Licensure Training	The RALC Director for your region is available to assist you with licensure questions and individual licensure training.	Ongoing	<a href="https://ralc.us/contact/">https://ralc.us/contact/</a>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
View Video Tutorials	Watch the Licensure Management and Application Online System <a href="#">Tutorials</a>  <a href="http://www.dpi.nc.gov/educators/educators-licensure">www.dpi.nc.gov/educators/educators-licensure</a>  Also, the RALC Directors are a good resource for assisting the charter with basic licensure policy or system questions.  <a href="https://ralc.us/">https://ralc.us/</a>	<b>Before School Starts</b>	<a href="http://www.dpi.nc.gov/educators/educators-licensure">http://www.dpi.nc.gov/educators/educators-licensure</a>  Licensure Specialists <a href="mailto:asklicensure@dpi.nc.gov">asklicensure@dpi.nc.gov</a> 919-716-1800
<b>Multi-Tiered System of Support</b>			
Review Joining Charters/ Non-traditional School Cohort one-pager	<a href="#">Joining Charter/Non-traditional School Cohort</a>	Recommended by August 31	Rhonda Harrell <a href="mailto:rhonda.harrell@dpi.nc.gov">rhonda.harrell@dpi.nc.gov</a> 252-299-3395  Ashley Springs

## New Charter Schools' Tasks List for Opening in 2022

			<a href="mailto:ashley.springs@dpi.nc.gov">ashley.springs@dpi.nc.gov</a> (984) 236-2159
Complete Partnership Agreement if interested in joining Charters/ Non-traditional School Cohort	<a href="#">Partnership Agreement</a>	As you are ready to join the Cohort	Rhonda Harrell <a href="mailto:rhonda.harrell@dpi.nc.gov">rhonda.harrell@dpi.nc.gov</a> 252-299-3395  Ashley Springs <a href="mailto:ashley.springs@dpi.nc.gov">ashley.springs@dpi.nc.gov</a> (984) 236-2159
Contact Regional IABS Consultant	Contact your regional IABS Consultant to assist you with the next steps below: <ul style="list-style-type: none"> <li>• Designating a <a href="#">MTSS contact/coordinator</a></li> <li>• Forming a school MTSS Leadership Team</li> <li>• Accessing the NC MTSS School Based Modules</li> <li>• Understanding how and why to utilize the <a href="#">NC MTSS Implementers Doc</a> and embedded resources</li> <li>• Attending the <a href="#">Regional MTSS Coordinator Meetings</a></li> </ul>	After you complete the Partnership Agreement	See page two of <a href="#">Joining Charter/Non-traditional School Cohort</a> document
<b>North Carolina Total Retirement Plans: 401(k) 457 403(b)</b>			
NC 401k & NC 457 Retirement Plans	Should the charter school decide to participate in the Teachers & State Employees Retirement System, then both the NC 401(k) & NC 457 Retirement plans would be available.	With a <a href="#">Board Resolution</a> and the completion of the <a href="#">Operational Information</a> , anticipate 4-6 weeks for implementation	Margaret Hendershot 919-214-1906 <a href="mailto:margaret.hendershot@prudential.com">margaret.hendershot@prudential.com</a>  (and the <a href="#">Retirement Education Counselor</a> for the location)
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
<a href="#">NC 457 Retirement Plan</a>	Should the charter school decide to decline participation in the TSERS pension, then the NC 457 Retirement Plan would be available. [Note: See attached list of <a href="#">Charter School Employers</a> who opted for the NC 457 Retirement Plan with a contribution or match.]	<a href="#">Board Resolution</a> and the completion of the <a href="#">Operational Information</a> , 4-6 weeks for implementation	Margaret Hendershot 919-214-1906 <a href="mailto:margaret.hendershot@prudential.com">margaret.hendershot@prudential.com</a>

## New Charter Schools' Tasks List for Opening in 2022

			(and the <a href="#">Retirement Education Counselor</a> for the location)
<b>Retirement Systems Division</b>			
Apply for entry into TSERS ( <b>optional</b> – does not apply to all new charter schools)	If an eligible charter school operated by a private nonprofit corporation wishes to join the Teachers' and State Employees' Retirement System (TSERS), which includes making mandatory payroll-based contributions toward employees' retirements, the charter school may apply for provisional entry into TSERS any time in the school's first two years of operation. Provisional entry is valid for one year. The school may apply for continued (full) participation to take effect one year after the effective date of provisional entry. An eligible charter school that has operated for more than two years may apply for full entry without the provisional step. Please see G.S. 135-5.3 for more information.	<b>Provisional entry:</b> within first two years of operation.  <b>Full entry:</b> After first two years of operation, or one year after provisional entry.	Patrick Kinlaw <a href="mailto:patrick.kinlaw@nctreasurer.com">patrick.kinlaw@nctreasurer.com</a> 919-814-4157  <a href="mailto:Doug.Mayer@nctreasurer.com">Doug.Mayer@nctreasurer.com</a>  *Contact Mr. Kinlaw for Sample Charter Provisional Requirements and FAQs.
<b>School Connectivity / E-rate</b>			
<i>Note: To connect to NCREN (free Internet) and get assistance in paying for WiFi, consult: <a href="#">NC E-rate Handbook</a>. This assumes there is already an <u>address</u> to start the circuit install for internet access and a 3-digit building code. Circuit now takes over 120 days from day of order to actual install. E-rate program information: <a href="#">NC School Connectivity Initiative (ncsu.edu)</a></i>			
LOA/479	Documentation to start the Internet Access circuit process	December 1 - prior to opening	<a href="mailto:Connectivity@dpi.nc.gov">Connectivity@dpi.nc.gov</a>
FCCRN	Register for a username and FCCRN from the FCC	December 1 - prior to opening	<a href="mailto:Connectivity@dpi.nc.gov">Connectivity@dpi.nc.gov</a>
BEN & EPC Login	Request Billed Entity Number and Account Admin from USAC	Immediately after receiving the FCCRN	<a href="mailto:Connectivity@dpi.nc.gov">Connectivity@dpi.nc.gov</a>
Enrollment and poverty rate	NCDPI State Valid File and Entity Update for USAC and EPC	December 1 - prior to opening	<a href="mailto:Connectivity@dpi.nc.gov">Connectivity@dpi.nc.gov</a>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
E-rate contact	Name, email, phone of E-rate contact for training and outreach	December 1 - prior to opening	<a href="mailto:Connectivity@dpi.nc.gov">Connectivity@dpi.nc.gov</a>
<b>School Nutrition</b>			

## New Charter Schools' Tasks List for Opening in 2022

<p><b>Note:</b> <i>There is not a definitive application start date for the School Nutrition Program, but <b>if the application process is started by the school in January 2022</b>, a possible timeline follows. The timeline is subject to change based on the responsiveness of the school and the ability to meet the School Nutrition requirements in a timely manner. School Nutrition Services does not allow retroactive claims; therefore, reimbursement will not be received for meals served prior to the final approval of the School Nutrition Program.</i></p>			
Complete School Interest Form	Complete form and return to School Nutrition along with school calendar.	<b>If Start in January 2022*:</b> January 1-5	Jacquelyn McGowan <a href="mailto:jacquelyn.mcgowan@dpi.nc.gov">jacquelyn.mcgowan@dpi.nc.gov</a> 984-236-2909
View Introduction to SN Program PowerPoint	Provides a brief overview of the School Nutrition Program along with requirements for the application process	January 6-10	Jacquelyn McGowan <a href="mailto:jacquelyn.mcgowan@dpi.nc.gov">jacquelyn.mcgowan@dpi.nc.gov</a> 984-236-2909
Initial Meeting	Schedule an onsite meeting or webinar to discuss particulars of the program.	January 11- January 31	<a href="#">School Nutrition Staff</a> (Scheduling will be based on availability of SN staff.)
Contact SN Staff regarding Procurement Plan	Procure catering services or services with a Registered Dietician who is knowledgeable of the School Nutrition Program	February 1 -April 30	<a href="#">School Nutrition Staff</a>
Menu Certification	Meet federal regulations for all meals served in the SN Program	May 1 – August 1	<a href="#">School Nutrition Staff</a>
Submit required electronic documents and various procedural documents required for SN operation	Procurement Plan Certificate of Occupancy Verification Plan Proof of Professional Standard Requirement Complete a Certified Food Protection Manager exam and submit proof of successful completion to State Agency Create and Submit Local Wellness Policy Cash Management Procedures Civil Rights Procedures and other required documents	August 1 – November 1	<a href="#">School Nutrition Staff</a>  <b>*The timeline for processing each step starts after the documentation is received by the School Nutrition Staff.</b>
Complete Annual Agreement process	Effective Date of Free or Reduced-Price School Meals Household Application Determination Attestation of Compliance with the Meal Pattern Requirement Signature Pages	August 1 – November 1	<a href="#">School Nutrition Staff</a>  ***Free and Reduced-Priced Meal Application Packet

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Task Name	Task Description	Timeline for Completion	Contact Person
<b>School Safety</b>			
Critical Incident Response for School Faculty and Staff	Video and Powerpoint that is presented to school faculty and staff that details best practices when dealing with critical incidents in their schools	Prior to opening and then yearly	Jay Jackson <a href="mailto:Jay.Jackson@dpi.nc.gov">Jay.Jackson@dpi.nc.gov</a> 984.236.2068 (office)
Vulnerability Assessment	Complete a detailed vulnerability report and compile an overall summary and detailed report on the school.	Prior to opening and yearly	Karen Everett n <a href="mailto:karen.everett@dpi.nc.gov">karen.everett@dpi.nc.gov</a> 984.236.2243
State Emergency Response Application (SERA)	Floor plan schematics for the state's K-12 public schools have been incorporated in the State Emergency Response Application (SERA), including nearly 3,000 school locations. This data is being leveraged in the School Risk Management Plan (SRMP) tool, that uses the collected school, building and asset data to facilitate the creation of school risk management plans in a consistent manner.	Yearly	Karen Everett <a href="mailto:karen.everett@dpi.nc.gov">karen.everett@dpi.nc.gov</a> 984.236.2243 (of
Register for SSARS	Go through the Center for Safer Schools to complete the Say Something Anonymous Reporting Application.	September 30	Mike Anderson <a href="mailto:mike.anderson@dpi.nc.gov">mike.anderson@dpi.nc.gov</a> 984-236-2242 (office)
Task Name	Task Description	Timeline for Completion	Contact Person
<b>Student Information System</b>			
Student Information System (PowerSchool)	PowerSchool is the North Carolina Student Information System (SIS). It is one of the Home Base applications used statewide by the public schools of North Carolina. This web-based application replaces the former student information system, NC WISE. It houses all aspects of student data including demographics, grades, attendance, etc. PowerSchool is required to be used by		Tessa Hine <a href="mailto:tessa.hine@dpi.nc.gov">tessa.hine@dpi.nc.gov</a>

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	all Public School Units of North Carolina for State Reporting, Federal Reports, and Student Final Grades. Further details will be provided separately to each PSU.		
PowerSchool Training	Initial Product Training (IPT) certification course will be a virtual 5 day course for the SIS Admin to attend. This course is required unless an already IPT certified SIS Admin is hired.	Summer (typically July/August)	Tessa Hine tessa.hine@dpi.nc.gov
PowerSchool Instance	PowerSchool instance access will be granted when SIS Admin staff from the Public School Unit attend the PowerSchool IPT Certification course in the summer.	Summer	Tessa Hine tessa.hine@dpi.nc.gov
PowerSchool Certified Technical Contacts	<ul style="list-style-type: none"> <li>• Each public school unit will have designated certified technical contacts to engage with PowerSchool support by submitting tickets. Each LEA/charter school with less than 30,000 ADM will have up to 2 designated technical contacts who may contact PowerSchool for support services.</li> <li>• PowerSchool IPT Certified Technical Contacts is a compliance requirement.</li> </ul>	Beginning of August	Tessa Hine tessa.hine@dpi.nc.gov
<b>State Health Plan</b>			
Group Setup	Complete Group Set-Up form  <a href="https://www.shpnc.org/new-groups-interested-joining-plan">https://www.shpnc.org/new-groups-interested-joining-plan</a>	60 days prior to desired Effective Date	<a href="mailto:HBRInquiries@nctreasurer.com">HBRInquiries@nctreasurer.com</a>



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Letter of Intent	Submit Letter of Intent to join SHP	60 days prior to desired Effective Date	<a href="mailto:HBRInquiries@nctreasurer.com">HBRInquiries@nctreasurer.com</a>
BOD Election submission	Submit board of directors' election to participate in the Plan	60 days prior to desired Effective Date	<a href="mailto:HBRInquiries@nctreasurer.com">HBRInquiries@nctreasurer.com</a>
Additional Info/Training	Conference Call with State Health Plan	Within one week after receiving above documents	<a href="mailto:HBRInquiries@nctreasurer.com">HBRInquiries@nctreasurer.com</a>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
<b>Testing &amp; School Accountability</b>			
Select a testing coordinator (TC)	Designate a TC. Provide TC contact info to RAC.	June 30	<a href="#">Regional Accountability Coordinator (RAC)</a>
EDDIE	Enter TC in EDDIE.	June 30	<a href="#">RAC</a>
Testing training	Ensure TC participates in BOG3 (elementary schools) and WIDA Screener trainings	<b>Prior to school opening</b>	<a href="#">RAC</a>
English Learner (EL) coordinator	Assign EL Coordinator if not the TC.	<b>Prior to school opening</b>	<a href="#">RAC</a>
EL School accounts	Set up WIDA and DRC school accounts	<b>Prior to school opening</b>	<a href="#">RAC</a>
PowerSchool	Establish PowerSchool and ensure completed enrollments (updating with new enrollments) and scheduling	<b>Prior to school opening, complete and accurate by 20<sup>th</sup> day</b>	<b>Three ways to request PowerSchool support:</b> <ol style="list-style-type: none"> <li>1. CHAT: Chat support will be available for you through the PowerSchool Community at: <a href="#">Launch Chat Support</a></li> <li>2. CASE: Submit a case via the PS</li> </ol>

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			PORTAL: <a href="https://help.powerschool.com/">https://help.powerschool.com/</a> 3. CALL: 1-855-339-4790
TC orientation	Ensure TC attends new TC training and sets up all testing accounts.	Prior to school opening or when scheduled by RAC	<a href="#">RAC</a>
North Carolina Identity Management Service (NCID)	School Administration sets up an established NCID Administrator for the school.  <a href="https://it.nc.gov/ncid-administrators/detail/lea-admin/Charter%20Schools%20000">https://it.nc.gov/ncid-administrators/detail/lea-admin/Charter Schools 000</a>	<b>Prior to opening</b>	Angela Coats <a href="mailto:angela.coats@dpi.nc.gov">angela.coats@dpi.nc.gov</a> 984-236-2418  <i>Support tickets:</i> <a href="https://ncgov.service-now.com/sp_dpi">https://ncgov.service-now.com/sp dpi</a>
<b>Task Name</b>	<b>Task Description</b>	<b>Timeline for Completion</b>	<b>Contact Person</b>
<b>Transportation Services</b>			
Needs Assessment	Assess the transportation needs of your population and develop a plan to address those needs. Things to think about depending on the school's plan include securing vehicles, setting up a website, developing routes, selecting a transportation contractor, registering for the Drug and Alcohol Clearinghouse, talking to DMV School Bus and Traffic Safety Division, etc.	When Student Enrollment Begins	School-Level Contact
Policies and Procedures	Create policies and procedures for attending students seeking transportation as well as any necessary forms for modification of that transportation arrangement.	<b>Prior to School Opening</b>	School-Level Contact
Modes of Transportation	Decide on whether you will provide for student needs with staff and your own hardware, if you will contract for those needs, or if you will rely on the school community to provide for them. <ol style="list-style-type: none"> <li>1. If you will provide transportation in-house: seek to hire staff and acquire equipment. Assure you assess and meet federal requirements for those staff and the equipment they will be using.</li> </ol>	<b>Prior to School Opening</b>	<i>For advice and direction, you may contact:</i> Kevin Harrison Section Chief NC DPI – Transportation Services <a href="mailto:Kevin.Harrison@dpi.nc.gov">Kevin.Harrison@dpi.nc.gov</a> 984-236-2932

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	<p>2. If you will contract for those needs, assure you assess your desired level of services (which determines costs) and check with multiple vendors.</p> <p>3. If you will rely on the school community for those needs, assess the legal ramifications and exposure in the event of incidents, your requirements for those drivers, if any, and how you will address shortfalls in availability or reliability. Create a position to facilitate.</p>		
Task Name	Task Description	Timeline for Completion	Contact Person
CDL License for Bus Drivers	If a school will be using/acquiring a vehicle that is capable of transporting 15 or more passengers, it would need to acquire the proper CDL license for the driver(s). NCDMV School Bus and Traffic Safety would be able to assist with some of that process dependent upon with what the vehicle is equipped.	30-90 days depending on equipment and accomplishment of outside requirements of driver	Contact a Trainer in the School Bus and Traffic Safety unit of NCDMV by calling 919-715-7000. Then ask for the contact information of the Trainer for the county in which the school resides.
School Safety Briefings	NCDMV School Bus and Traffic Safety personnel could offer school safety briefings regarding the safe proper legal operation of CDL vehicles and the needs of those CDL vehicles.	<b>Prior to School Opening</b>	Contact a Trainer in the School Bus and Traffic Safety unit of NCDMV by calling 919-715-7000. Then ask for the contact information of the Trainer for the county in which the school resides.

**Regardless of whether you are starting a new charter school or transitioning to a charter as a new leader, we hope you will find this checklist of use.**

Other useful information:

- Update **EDDIE**, <http://apps.schools.nc.gov/eddie>
- Epicenter**, new user activation email from [Joseph.Letterio@dpi.nc.gov](mailto:Joseph.Letterio@dpi.nc.gov)
- Get subscribed to the **Office of Charter School** newsletter, <https://content.govdelivery.com/accounts/NCSBE/bulletins/29ab8fb>

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- ❑ Follow us on **Twitter @NCCharterOffice**
- ❑ **Join Teacher Match/School Spring Teach NC statewide Job Board**, contact Wendy Hinson @ [Wendy.Hinson@dpi.nc.gov](mailto:Wendy.Hinson@dpi.nc.gov)
- ❑ **Subscribe to School Business Newsletter** at <https://www.dpi.nc.gov/districts-schools/district-operations/financial-and-business-services/school-district-finance-operations/procedures-and-guidance#newsletter>
- ❑ Bookmark the **Office of Learning Recovery & Acceleration (OLR)** website [Office of Learning Recovery & Acceleration | NC DPI](#)