BOCES SAMS: CO-SERS AND THE LAS (A SED TALK)

ASBO SBMW
November 3, 2021
WHAT IS SAMS?

S. A. M. S. stands for:
State
Aid
Management
System
WHAT IS SAMS?

SAMS is accessed via the SED Business Portal:

Portal Web Address: https://portal.nysed.gov/abp
WELCOME TO SAMS

Helpful tips:

1. SAMS, in general, likes the Firefox browser
   • If Firefox is not an option, try Chrome.
   • Accessing SAMS using Internet Explorer or Edge is not recommended.
WELCOME TO SAMS

The 2021-2022 BOCES Financial State Aid Claim Year forms and schedules will be available by September 1, 2021.

Thank you.

There is a known issue with SAMS and Microsoft's newest version of Internet Explorer 11.

We are currently working on this issue and hope to have this issue resolved soon. In the meantime, you can do the following:
1. Downgrade to an earlier version of Microsoft's Internet Explorer
2. Use an alternate web browser. We recommend either Mozilla's Firefox or Google's Chrome browser.

Welcome to the BOCES/CoSer State Aid Management System

BOCES SAMS Financial System Training Manual for BOCES Users

SAMS - Latest News and Updates
WELCOME TO SAMS

Helpful tips:

2. Don’t forget to change the Claim Year!
   • BOCES Aid is claimed in the year after services are rendered.
   • In other words, the 2021-22 School Year is the 2022-23 Claim Year.

1. Change it! 2. Set it!
WHAT IS THE LAS?

L. A. S. stands for List of Active Services

• The BOCES CO-SER LAS is the “menu” of services that a BOCES offers in a given school year
  • Remember that the CLAIM YEAR is one year AFTER the current SCHOOL YEAR

• The LAS is where new CO-SERs are entered and where existing CO-SERs are amended
WHAT IS THE LAS?

The LAS has 2 “sides”—

1. Official Data
2. Revision Data
WHAT IS THE LAS?

Official Data LAS

- Official Data LAS is the first place you look whenever working with CO-SERs.
- Make sure LAS is cleaned and certified before the CO-SER Rollover.
- All data in Official LAS is populated into the next year during CO-SER Rollover.
### List of Active Services for the 2021-2022 School Year

**Programs Awaiting Approval**

This table includes all CoSerS that are awaiting CoSer Service Description approval and is for information purposes only. Once a CoSer has been approved, it will be removed from this list and added to the LAS.

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>PSN</th>
<th>Activity Title</th>
<th>Program name</th>
<th>First Year Service Offered</th>
<th>CoSer Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000</td>
<td>001</td>
<td>Administration</td>
<td>Central Administration</td>
<td>2008-2009</td>
<td>Active</td>
</tr>
<tr>
<td>1900</td>
<td>002</td>
<td>Undistributed</td>
<td>Capital &amp; Facility Rentals</td>
<td>2008-2009</td>
<td>Active</td>
</tr>
<tr>
<td>3000</td>
<td>101</td>
<td>General Occupational Education</td>
<td>CAREER EDUCATION</td>
<td>2008-2009</td>
<td>Active</td>
</tr>
<tr>
<td>3006</td>
<td>102</td>
<td>Other</td>
<td>COOPERATIVE SERVICES MODEL</td>
<td>2008-2009</td>
<td>Active</td>
</tr>
<tr>
<td>3001</td>
<td>103</td>
<td>Special Occupational Education</td>
<td>SPECIAL CAREER EDUCATION</td>
<td>2008-2009</td>
<td>Active</td>
</tr>
<tr>
<td>4220</td>
<td>202</td>
<td>Staffing 1.12.1</td>
<td>Special Education 12.1</td>
<td>1994-1995</td>
<td>Active</td>
</tr>
<tr>
<td>4230</td>
<td>203</td>
<td>Staffing 16.1</td>
<td>Special Education 6.1</td>
<td>1994-1995</td>
<td>Active</td>
</tr>
<tr>
<td>4240</td>
<td>204</td>
<td>Staffing 13.2</td>
<td>Special Education 13.2</td>
<td>1994-1995</td>
<td>Active</td>
</tr>
<tr>
<td>4235</td>
<td>205</td>
<td>Staffing 13.1</td>
<td>Special Education 13.1</td>
<td>1994-1995</td>
<td>Active</td>
</tr>
<tr>
<td>7010</td>
<td>302</td>
<td>Business Manager</td>
<td>Shared Business Manager</td>
<td>2008-2009</td>
<td>Active</td>
</tr>
</tbody>
</table>
OFFICIAL DATA LAS

• Enter a new CO-SER

*Note: in the official data area, all hyperlinks and buttons (except Reset) will save the form.
1. Enter the Activity Code and PSN:
2. Enter local Program Name and a Description of the Services to be Provided:
3. Enter the Service Plan information into the remaining fields.

NOTE: Sections F, G, & H are only used if applicable. All other fields are required.
ENTERING A NEW CO-SER, IN SEVEN EASY STEPS

4. Enter Projected Budget

<table>
<thead>
<tr>
<th>Object Code</th>
<th>Object Name</th>
<th>Projected Budget Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>150</td>
<td>Certified Salaries</td>
<td></td>
</tr>
<tr>
<td>150</td>
<td>Other Salaries</td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>Capital Outlay/Equipment</td>
<td></td>
</tr>
<tr>
<td>300</td>
<td>Supplies and Materials</td>
<td></td>
</tr>
<tr>
<td>400</td>
<td>Contract and Other</td>
<td></td>
</tr>
<tr>
<td>440</td>
<td>Professional Services</td>
<td></td>
</tr>
<tr>
<td>450</td>
<td>School Districts/Other BOCES</td>
<td></td>
</tr>
<tr>
<td>800</td>
<td>Employee Benefits</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>0</td>
</tr>
</tbody>
</table>

5. Enter Anticipated Districts to be Served

<table>
<thead>
<tr>
<th>BIDS Code</th>
<th>District Name</th>
<th>% of Service</th>
<th>Remove?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>add row</td>
</tr>
</tbody>
</table>

New York State EDUCATION DEPARTMENT
Knowledge  Skill  Opportunity
6. Save Your Entry

7. BOCES DS Approves

After DS approves, the CO-SER is reviewed by SED for further revision or approval.
ENTERING A NEW CO-SER

Helpful tip for BOCES developing a new CO-SER for entry in SAMS:

The “Get Other CO-SERs” button is your friend!

It allows BOCES to view (and select and use!) previously approved CO-SER narrative language from CO-SERs with the same Activity Code among all BOCES in the State!
ENTERING A NEW CO-SER

Helpful tip for BOCES developing a new CO-SER for entry in SAMS:

1. A new window will open up when you click the button. Leave it open and go back to the new CO-SER form in SAMS.

2. Back in SAMS, select the previously approved CO-SER you would like to view.
### ENTERING A NEW CO-SER

Helpful tip for BOCES developing a new CO-SER for entry in SAMS:

3. After selecting the CO-SER you want to view, go back to the pop-up window to view the narrative as approved. If you want to reuse language, make sure the corresponding check-box on the left is selected and then click “Add These Details”.

<table>
<thead>
<tr>
<th>Needs Addressed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distance Learning Program Advisory Committee will meet to give input to assist in the development of the service so that it can meet the needs of participating districts. This committee consists of participating school district Superintendents, Principals and School Counselors who attend regularly scheduled meetings to provide input on courses and schedules.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic goals of this distance learning system include: Provision of expanded curriculum options to students in the Franklin-Eesus-Hamilton BOCES Distance Learning service area, including students with disabilities. Provision of additional opportunities for high school students to sample college courses. Provision of advanced or technical courses for those preparing to enter post-secondary college, technical schools or careers which call for such extensive preparation. Provision of enrollment opportunities which would otherwise not be available.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following measures will be implemented to provide evidence that Part 100 of the Commissioner’s Regulations have been followed. Electronic surveys completed by teachers and district staff upon course completion demonstrate students have completed 120 hours of instruction for initial courses and all other required testing and course requirements have been met. Statistics from School Counselors in regards to student grades and testing performance. Regional graduation statistics. Course enrollment numbers. Training workshop attendance. Periodic reviews by the Distance Learning Program Advisory Committee on success of service.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Evaluation Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOCES staff has assumed the overall leadership in establishing a strategic vision as described in this narrative. BOCES will employ suitable staff to ensure effective and efficient use of this service. Staff will be involved with the selection of teachers as well as curriculum that will be the basis of the service. Overall, the articulation of the service program will remain a responsibility of BOCES with input of a service wide delivery area advisory group made up of local Chief School Officers and an instructional planning committee made up of principals and school counselors who have been given programmatic responsibility for the service as the local school district. Two or more participating districts will share any designated testing site(s). Specific tasks-activities include: • Procure vendors and online courses for student enrollment. • Communicate with school districts and assist with questions for online programs. • Facilitate training of staff in academic and social emotional learning curricula. • Communicate regularly with online instructors. • Communicate regularly with teachers of record. Development of an online learning lab to assist students as needed.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOCES will hire and supervise part-time instructors and compensate them with a predetermined fee per session.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stipends</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOCES will hire and supervise part-time instructors and compensate them with a predetermined fee per session.</td>
</tr>
</tbody>
</table>
CO-SER REVISION?

- Process is similar for revisions to old CO-SERs
  - Revisions are made in Official LAS.
  - Major Difference:
    1. Select an active CO-SER from the LAS to edit, rather than entering a new CO-SER.
- DS approval is still needed in revised CO-SER.
CO-SER - SED APPROVAL

- Once CO-SER is “DS_APPROVED”, SED can perform final review.

Programs Awaiting Approval

This table includes all CoSers that are awaiting CoSer Service Description approval and is for information purposes only. Once a CoSer has been approved, it will be removed from this list and added to the LAS.

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>PSN</th>
<th>Activity Title</th>
<th>Program Name</th>
<th>First Year Service Offered</th>
<th>CoSer Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>5077</td>
<td>450</td>
<td>Distance Learning</td>
<td>Virtual Oasis - Online Academy</td>
<td>2021-2022</td>
<td>DS_APPROVED</td>
</tr>
</tbody>
</table>
CO-SER - SED APPROVAL

• SED Approval will include Aid Restriction Criteria, if applicable.
  • Aid restrictions are listed in CO-SER Criteria Guidelines.
CO-SER - SED APPROVAL

• Once SED approves, CO-SER is ACTIVE in the LAS.

• CO-SERs can be changed from Active to Inactive, or get Deleted, in the LAS:

...just be sure to save your changes!
• End of Year Procedures:
  1. Go through LAS
     • Make sure you know what services you are running
  2. Check CO-SER Status
     • Make sure that CO-SERs for next year are listed as ACTIVE before the Rollover
     • Any CO-SER that will NEVER run again can be DELETED
       • Only mark a CO-SER for Deletion if you are sure it will never be needed again.
OFFICIAL LAS

• End of Year Procedures:
  3. Print the LAS…before the CO-SER Rollover
     • Or copy and paste into Excel (trust me, it works!)
  4. District Superintendent must Certify the LAS
     • To ensure that all necessary data is included in the May State Aid Database, the Official LAS should be Certified by April 15th each year.
• AFTER THE ROLLOVER—
  • Compare “old” LAS to “new” LAS.
  • If a CO-SER didn’t “roll,” notify SED as soon as possible!
Revision Data LAS should only be used **AFTER** the Official Data Edit Report is “Clean” and the Official LAS has been Certified:

<table>
<thead>
<tr>
<th>Expand All</th>
<th>Collapse All</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cosar Forms</strong></td>
<td></td>
</tr>
<tr>
<td>- CosarForms_Clean</td>
<td></td>
</tr>
<tr>
<td>- List of Active Services Form</td>
<td></td>
</tr>
<tr>
<td>- Cross Contracting Form</td>
<td></td>
</tr>
<tr>
<td>- CoSer Edit Report_Clean</td>
<td></td>
</tr>
<tr>
<td>- CoSer Certification Form_Certified</td>
<td></td>
</tr>
<tr>
<td>- CosarSBM4Form</td>
<td></td>
</tr>
<tr>
<td>- SBM 4</td>
<td></td>
</tr>
<tr>
<td>- CoSer SBM4 Certification Form</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expand All</th>
<th>Collapse All</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cosar Forms</strong></td>
<td></td>
</tr>
<tr>
<td>- CosarForms_Clean</td>
<td></td>
</tr>
<tr>
<td>- List of Active Services Form</td>
<td></td>
</tr>
<tr>
<td>- CoSer Program Changes Form</td>
<td></td>
</tr>
<tr>
<td>- CosarSBM4Form</td>
<td></td>
</tr>
<tr>
<td>- SBM 4</td>
<td></td>
</tr>
<tr>
<td>- CoSer SBM4 Certification Form</td>
<td></td>
</tr>
<tr>
<td>- CoSer SBM4 Program Changes Form</td>
<td></td>
</tr>
</tbody>
</table>
• If you use Revision to enter new information or changes, it MUST be completed in Revision to become part of Official.

In other words, don’t forget to hit submit!
• End of Year Procedure:
  1. Complete any edits to LAS
     1. Make sure SED approves any CO-SER revisions
     2. Make sure any new CO-SERs approved in Revision appear in Official before the Rollover
SPEAKING OF CO-SERS…

CO-SER Criteria Guideline System (CCGS)

• BOCES Handbook 2 has effectively been discontinued. Rather than provide a static paper or PDF handbook, NYSED compiled a dynamic online database that contains the guidelines for all available CO-SER Activity Codes, including program scope, specific requirements, and Aid criteria.
SPEAKING OF CO-SERS…

• Sample Guideline:

<table>
<thead>
<tr>
<th>Service Descriptors</th>
<th>Standards for Approval</th>
<th>Contracts for Staff</th>
<th>Aid Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Requirements</strong></td>
<td>Compliance with applicable laws, regulations, and general guidelines.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Specific Requirements</strong></td>
<td>Staff members providing instruction must hold an appropriate teaching certificate. Individuals who do not meet this requirement must work under the direct supervision of a certified teacher. Service delivery standards and service delivery agreements must be prepared as outlined in the attached document.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Service Plan Required</strong></td>
<td>A service plan must be submitted with the initial application for approval. The service plan must describe the service provided, the role of BOCES staff in the management and operation of the program, the role of consultants and/or contracts. The standards for which participants are billed, and any additional elements listed below.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Additional Service Plan Elements</strong></td>
<td>An explanation of how BOCES staff manage the instruction provided, including how staff are selected and supervised. Evidence of plans for an annual program review by a committee of secondary school principals to determine equivalency of instruction and student eligibility for credit. Evidence that the service meets the following criteria contained in Education Law §1590(4)(b):</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The proposed service will provide additional opportunities for pupils, including those with handicapping conditions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The proposed service will provide cost savings to participating districts, exclusive of additional aid.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The proposed service will ensure a greater or more appropriate use of facilities by BOCES.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• An identification of equipment to be used in the service, indicating the location of the respective equipment items, and a diagram illustrating the interconnection of the equipment.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SPEAKING OF CO-SERS…
CO-SER Criteria Guideline System (CCGS)

• CCGS can be found on the web:

https://eservices.nysed.gov/srr/ccgs_welcome
CO-SER CRITERIA GUIDELINE SYSTEM (CCGS)

• New and/or Amended CO-SER Guideline entries are announced on the CCGS home screen

• To search, click “Criteria Guidelines”
• Next, enter search criteria and click “Search”
CO-SER CRITERIA GUIDELINE SYSTEM (CCGS)

• Results are displayed below:

<table>
<thead>
<tr>
<th>CG Number</th>
<th>Title</th>
<th>Cluster</th>
<th>Division</th>
<th>PSN</th>
</tr>
</thead>
<tbody>
<tr>
<td>5877</td>
<td>Distance Learning</td>
<td>GENERAL EDUCATION SERVICES</td>
<td>General Education</td>
<td>400-499</td>
</tr>
</tbody>
</table>

Export options: CSV, Excel, XML
CO-SER CRITERIA GUIDELINE SYSTEM (CCGS)

• To view a list of ALL activity codes, simply click “Show All”

• Then export to the format of your choice (...I like Excel...)

Export options: CSV | Excel | XML
CO-SER CRITERIA GUIDELINE SYSTEM (CCGS)

- Save the file for future reference.
CO-SER Activity 5842: Arts in Education

- BOCES operates a shared service to integrate arts into curriculum
  - Activities may include—
    - Music
    - Drama
    - Dance
    - Writing
    - Visual and Digital arts
    - Staff development on specific art(s)

- Can be used to allow installment purchase agreements (IPAs) for otherwise cost-prohibitive specialized art equipment to districts (e.g. Musical Instruments)
CO-SER Activity 7470: Safety/Risk Management

- This is a FACILITIES PLANNING SERVICE...
  - Scope is to provide leadership and training on—
    - Right-to-know (hazardous materials)
    - OSHA/SOSHA guidelines and requirements
    - Disaster preparedness
    - Fire and Building Code
    - Planning for asbestos and other hazardous material abatement

- Not for water testing; That is unaided in Activity 7410 (Facilities Service)
- Not for physical health screenings (e.g. COVID testing); That is partially aided in Activity 6709 (Community School Resources)
CO-SER QUESTIONS: ALLOWABLE? AIDED?

CO-SER Activity 5877: Distance Learning

- This is a Gen Ed Central Service
- The CO-SER was developed to provide supplemental instruction to students that otherwise are unable to receive instruction in-person

- In response to COVID-19 concerns, the Department has allowed standalone Virtual Schools with the following caveats:
  - The program may be offered only to districts that are components of your BOCES
  - any teachers of core academic classes must be hired as BOCES employees or remain fully employed by the “home district” but assigned to the BOCES virtual program
  - Approved applications for regional virtual schools may run through June 30, 2023
CO-SER QUESTIONS: ALLOWABLE? AIDED?

CO-SER Activity 6709: Community School Resources

• This is a central service that can contain multiple types of student and school community supports
• CO-SER scope is to deliver co-located or school-linked academic, health, mental health, nutrition, counseling, legal and/or other services to students and their families in a manner that will lead to improved educational and other outcomes; for example—
  • Health screening and referral service
  • Short-term health care (not a permanent primary care service)
  • Academic guidance, tutoring, and counseling
  • Family resources (legal assistance, mental and behavioral health services)

• A good rule of thumb for Aid—if the service requires a medical license, it is not aided…but admin and other BOCES costs can be.
Planning/Improvement CO-SERs:
- 6211: School/Curriculum Improvement
  - Instructional Support
  - Provides PD to raise district standards and build local capacities
- 6212: Planning, Instructional
  - Instructional Support
  - Assists in development/improvement of specific programs and internal planning processes
- 7210: Planning Service, Management
  - Non-instructional Support
  - District planning service, designed to provide long-range plans around personnel, finance, facilities, etc.

- When combined, these three CO-SERs could constitute a comprehensive BOCES strategic planning service.
CO-SER QUESTIONS: ALLOWABLE? AIDED?

Technology CO-SERs:

- **6360**: Instructional Technology Service
  - Provides classroom and other instructional hardware, software, and related technical support and maintenance services
  - Model Schools CO-SER (6368) is a requirement to participate in 6360.
    - Model Schools CO-SER provides the training and integration plans for the technology
    - Aligns with the regional 793 plan

- **7710**: Computer Service, Management
  - CO-SER is for Regional Information Centers (RICs) only.
  - Provides central monitoring and management services, such as—
    - Cyber security
    - Building perimeter security (passive technology only)
      - Facial recognition software is expressly disallowed
    - Technology infrastructure
    - State reporting
    - Data warehouse / Data management services
Questions?