

USIMS Program Management Review

Utah Schools Information Management System

September 23, 2024 | Utah State Board of Education

Katrina Brinkley, Chief Product Owner and USIMS Program Manager

TOPICS

- Domains
- Roadmap
- USIMS Financials
- Educator Domain
- Student Domain
- Finance Domain
- Upcoming Events

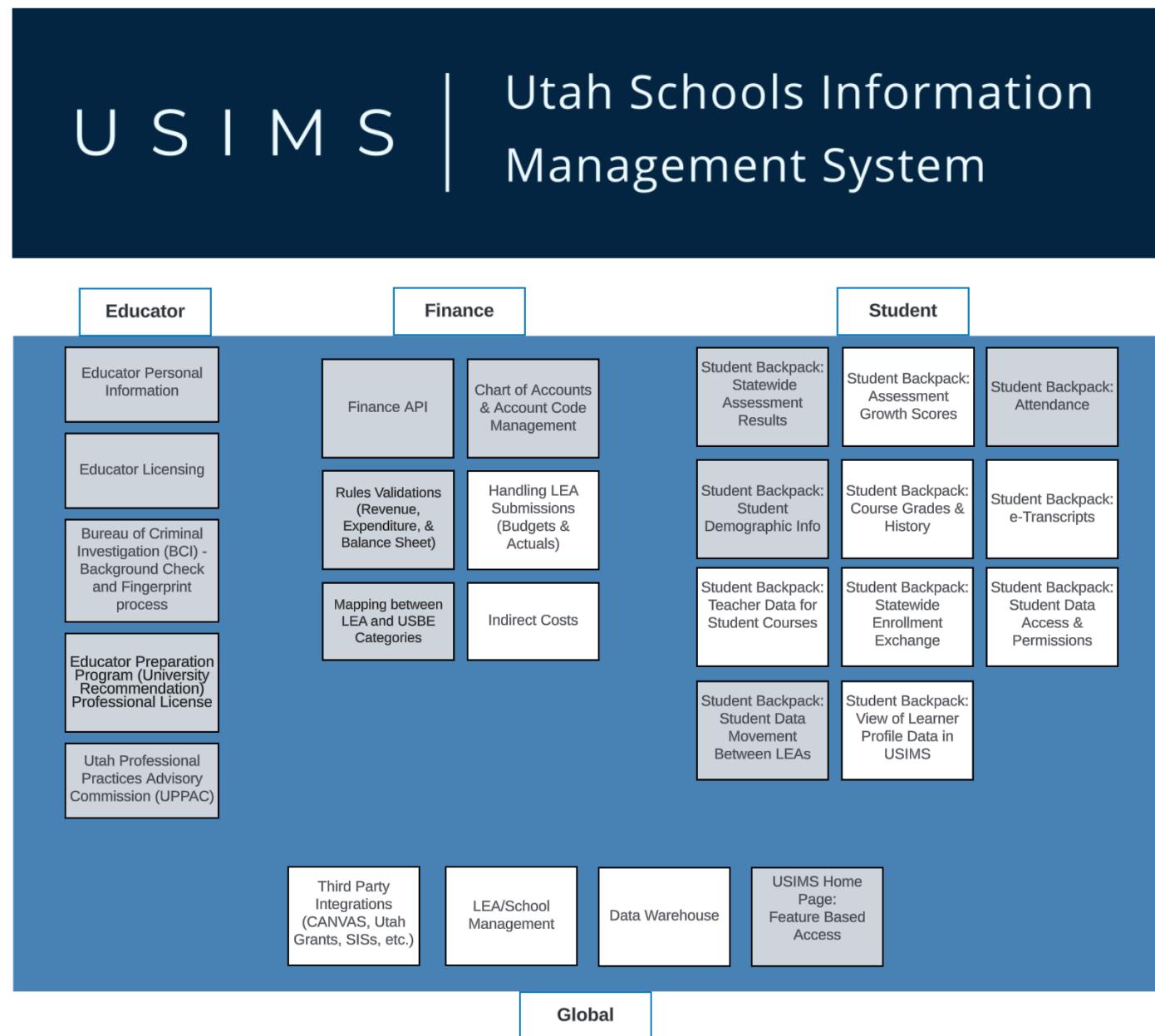
Domains

Educator domain includes all educator licensure processes like background checks, new licenses, duplicate licenses, etc.

Finance domain includes all financial submissions from LEAs, managing the USBE categories for revenue & expenses, and funding allocation.

Student domain includes the student backpack, student information exchange, and LEA reporting.

[USIMS Dashboard Link](#)



	Educator Team (Skywalkers)	Student Team (Maverick)	Student Team (Sirius)	Finance Team (Illusionists)
Current Work	<p>CBR/BCI Auto Renewal of Rapback T&L CBR/BCI results High Priority Enhancements</p> <p>Assignments Provide the LEA the ability to manage Educator Assignment Details</p>	<p>Backpack: Real Student Enrollment/Identity Data Associate Student Enrollment/Identity from LEA to Student Backpack in USIMS</p> <p>Backpack: Real Student RISE Scores Consume and Share Live Scores with LEAs</p>	<p>Backpack: Real Student Enrollment/Identity Data Associate Student Enrollment/Identity from LEA to Student Backpack in USIMS</p> <p>Backpack: Real Student Attendance Data Consume and Share Live Attendance Data</p>	<p>Finance API - Improve & Standardize Swagger Documentation</p> <p>Indirect Cost - Base Calculations</p>
Future Work (in order of current priority)	<p>Consume Utah Education Network (UEN) features in USIMS</p> <p>UPPAC Integrate Board Hearing Process High Priority Enhancements</p> <p>Provide Educator Licensing USIMS data reporting</p> <p>Professional License Renewal form removal requirement</p> <p>Provide the ability to do LEA Management (Districts and Schools) in USIMS</p> <p>Resolve USIMS tech debt</p> <p>Ed Prep Program</p>	<p>Backpack: Real Student UT Aspire Plus Scores Consume and Share Live Scores with LEAs</p> <p>Backpack: Real Student ACT Scores Consume and Share Live Scores with LEAs</p> <p>Backpack: Real Student Acadience 3rd Grade Reading Consume and Share Live Scores with LEAs</p> <p>Backpack: WIDA Screener Results Consume and Share Live Select WIDA Screener Scores with LEAs</p> <p>Backpack: Select SCRAM Data Associate Scores and View In Special Education Learner Profile</p> <p>Backpack: Eligibility & Determination Report</p>	<p>Backpack: Real Student and School Growth Scores Consume and Share Live Student and School Growth Scores</p> <p>Backpack: Real Student Demographics Data Consume Live Data from LEAs and LEAs Can Retrieve Data</p> <p>Backpack: Real Course Grades and History Data Consume Live Data from LEAs and LEAs Can Retrieve Data</p> <p>Backpack: Teacher Data for Student Courses Consume Live Data from LEAs and LEAs Can Retrieve Data</p> <p>Backpack: Select Birth and Health Data Explore adding select birth and health info to Student Backpack via URDC API</p> <p>Backpack: eTranscripts</p>	<p>Indirect Cost - Adjustments</p> <p>Indirect Cost - Carry Forward Calculations</p> <p>Manage Accounts</p> <p>Manage Accounts Combinations</p>

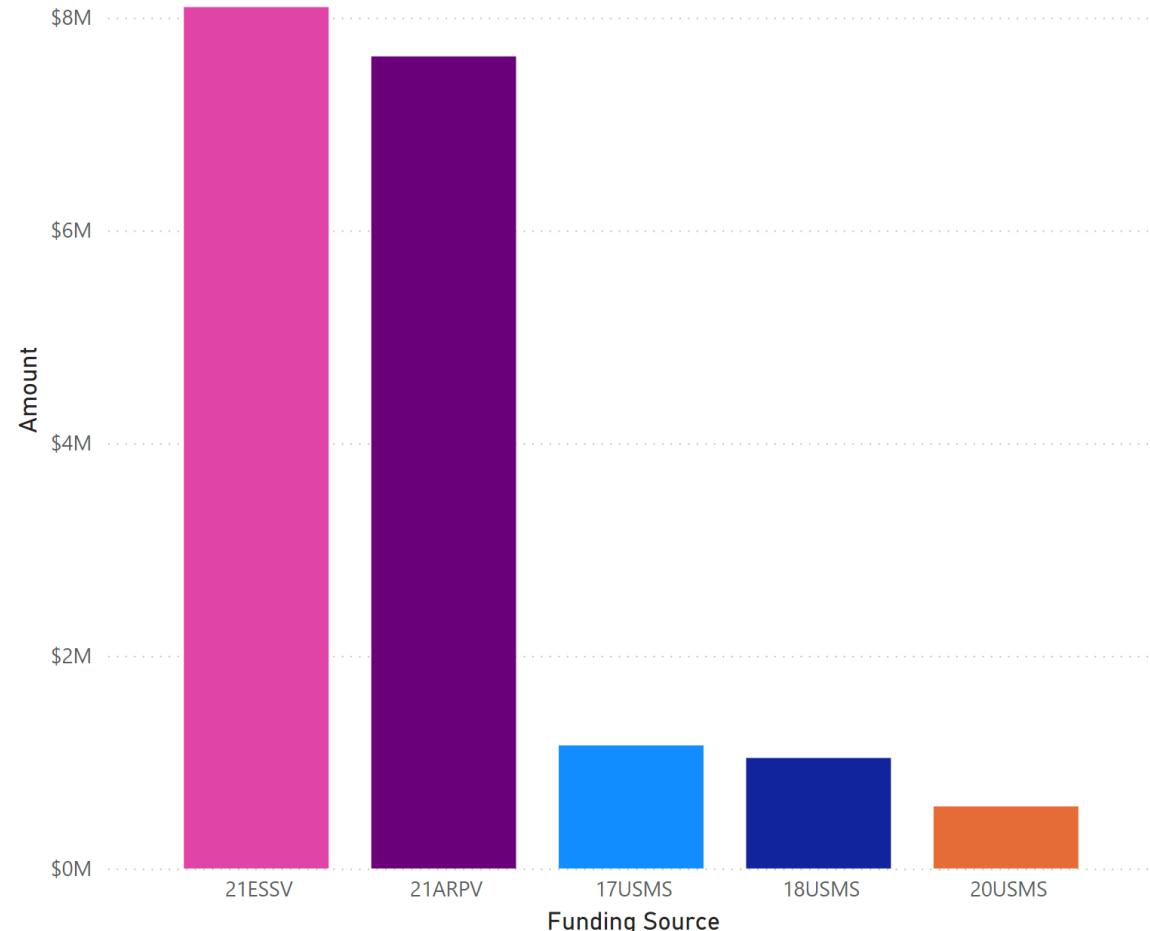
Roadmap [\(Link\)](#)
as of 23 Sept 2024



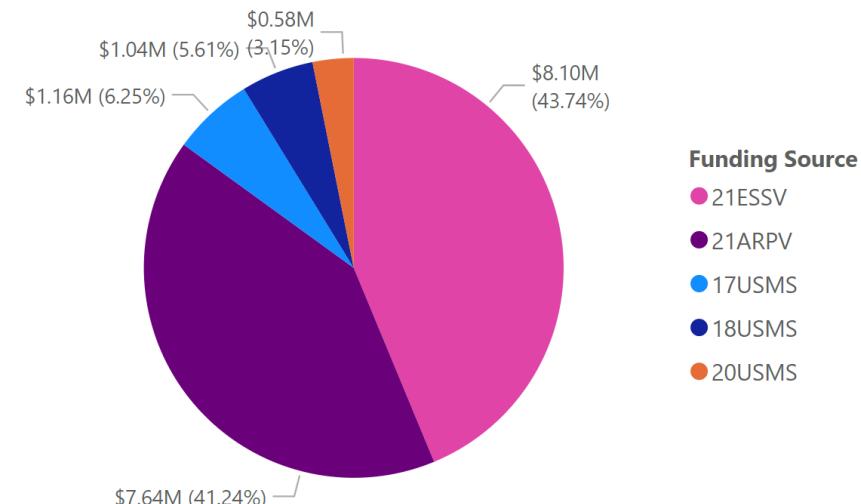
USIMS Financials

Amount by Funding Source and Program (groups)

Program (groups) ● 17USMS ● 18USMS ● 20USMS ● 21ARPV ● 21ESSV



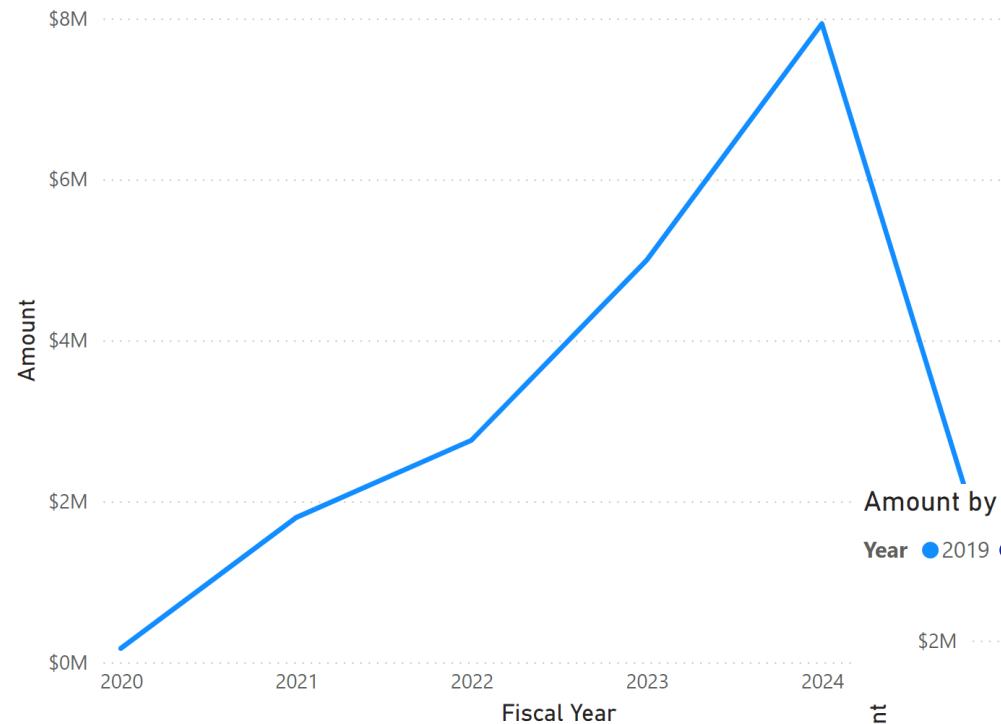
Amount by Funding Source



Funding Source	Spent	Encumbered	Funded
17USMS	\$1,157,500.87	\$16,638.5	\$3,467,473.00
18USMS	\$1,039,138.08	\$0	\$1,039,138.00
20USMS	\$583,766.60	\$0	\$17,200,000.00
21ARPV	\$7,635,401.68	\$1,484,356.27	\$8,201,961.00
21ESSV	\$8,099,364.78	\$0	\$8,098,039.00
Total	\$18,515,172.01	\$1,500,994.77	\$38,006,611.00

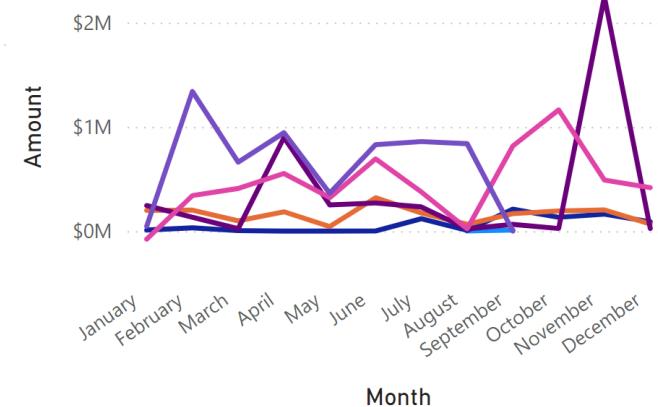
Year	Month	Amount
2022	March	\$23,446.57
2022	April	\$897,665.37
2022	May	\$250,804.14
2022	June	\$268,968.09
2022	July	\$231,681.62
2022	August	\$20,830.79
2022	September	\$64,273.73
2022	October	\$25,208.84
2022	November	\$2,245,832.38
2022	December	\$24,945.53
2023	January	(\$77,797.82)
2023	February	\$340,344.71
2023	March	\$408,622.24
2023	April	\$551,875.86
2023	May	\$320,058.95
2023	June	\$692,608.88
2023	July	\$374,825.15
2023	August	\$21,361.34
2023	September	\$816,948.68
2023	October	\$1,162,167.26
2023	November	\$489,918.27
2023	December	\$416,213.05
2024	January	\$46,130.72
2024	February	\$1,339,114.85
2024	March	\$660,812.57
2024	April	\$944,194.90
2024	May	\$362,955.24
2024	June	\$828,508.43
2024	July	\$857,941.48
2024	August	\$838,856.66
2024	September	\$130.00
Total		\$18,515,172.01

Amount by Fiscal Year



Amount by Month and Year

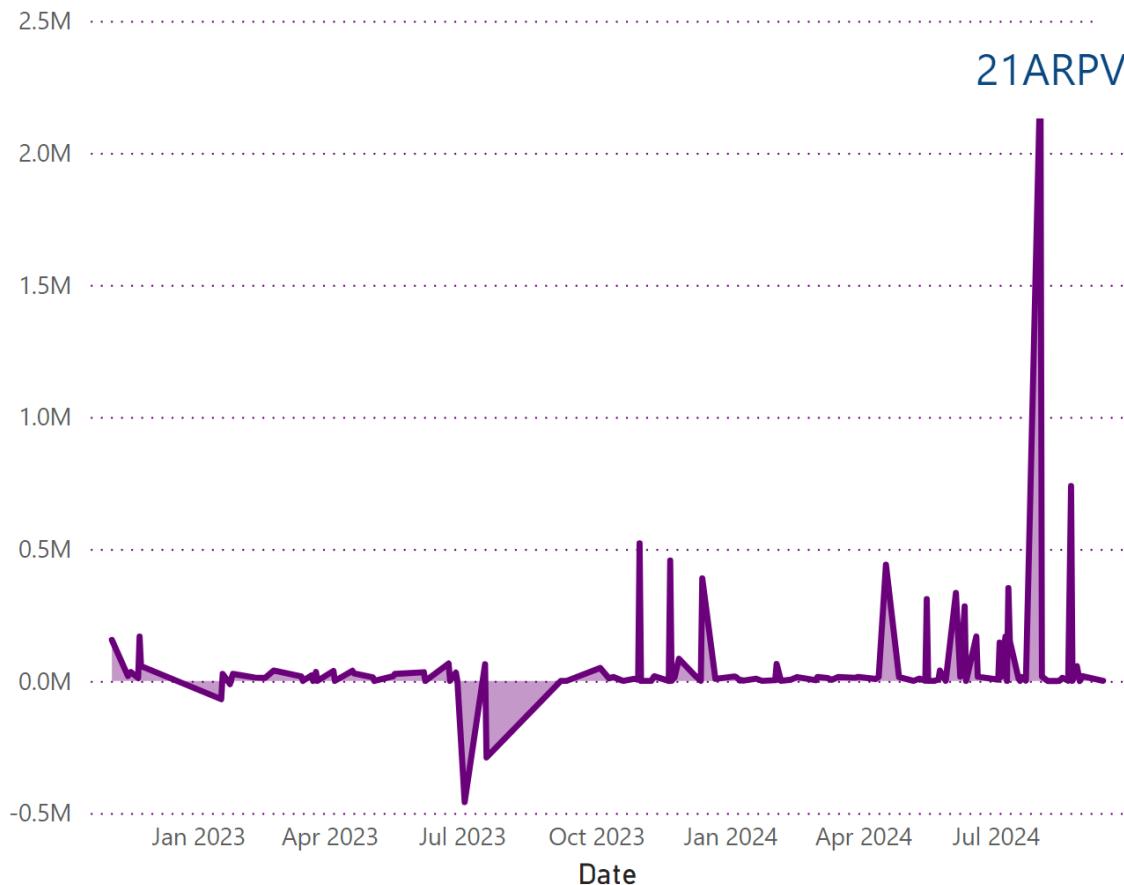
Year ● 2019 ● 2020 ● 2021 ● 2022 ● 2023 ● 2024



Finances by Fiscal Year



Total by Date

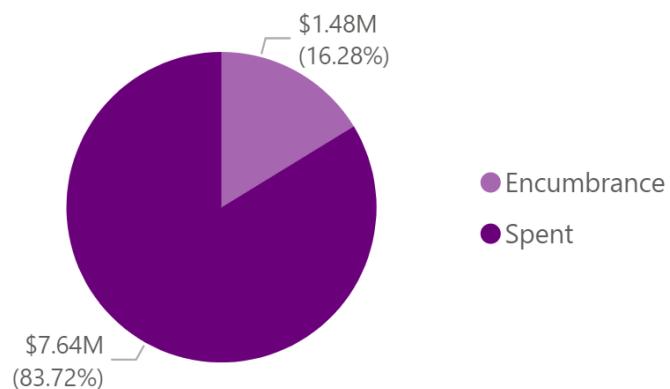


Finances by Fund

21ARPV is time limited and must be expended by 30 September 2024

Total	Date
130.00	13 September, 2024
17,794.63	30 August, 2024
-524.93	28 August, 2024
55,847.55	26 August, 2024
0.00	23 August, 2024
737,737.16	22 August, 2024
524.93	20 August, 2024
11,524.64	16 August, 2024
524.93	14 August, 2024
-464.80	12 August, 2024
65.33	8 August, 2024
-548.20	6 August, 2024
16,375.42	2 August, 2024
2,300,072.05	1 August, 2024
7,635,401.68	
Encumbrance	
\$1,484,356.27	Total Budget
	\$8,201,961.00

Encumbrance and Spent



Educator Domain

Without USIMS Educator Domain	With USIMS Educator Domain	Positive Improvements
<ul style="list-style-type: none"> Utah Interactive functionality: Seven time-consuming inefficient one-time individual transactions: <ul style="list-style-type: none"> Educator ethics review Background check Duplicate license Expired license renewal Professional license renewal University recommends Update my contact information Continued use of the following infrastructure: <ul style="list-style-type: none"> CACTUS system, including teacher lookup tool, university recommends, CACTUS Application Programming Interface (API), Remote Desktop Service (RDS), and educator evaluations Utah Education Network (UEN) Utah Professional Practices Advisory Commission (UPPAC) spreadsheet Midas uploads CANVAS Utah Interactive CACTUS is unable to allow for an educator to have an assignment with multiple LEAs in regard to 53E-3-517 (2) 	<ul style="list-style-type: none"> All of the following under one USIMS account with integrated system notifications: Educator ethics review, background check, duplicate license, expired license renewal, professional license renewal, university recommends, and update my contact information Educator domain is the system of record for educator data and processes Provide infrastructure to provide for the following functionality: <ul style="list-style-type: none"> Initial (New) Licensure Awarded License maintenance activities (renewals, data updates, etc.) UPPAC Other educator business processes 	<ul style="list-style-type: none"> Improves the administrator's ability to effectively and efficiently manage educators inside of USIMS educator domain USIMS infrastructure analyzes and interprets data to assist LEAs for educator reporting One stop shop for educators, LEAs, and administrators for educator licensing activities USIMS does not require rollovers. The Educator Domain has the capability to distinguish between school years and have that information for funding/reports as needed Removes legacy systems integration and interoperability inadequacies

Educator Domain

Without USIMS Educator Domain	With USIMS Educator Domain	Positive Improvements
<ul style="list-style-type: none"> Bureau of Criminal Investigation (BCI) - Background Check and Fingerprint process (CBR) <ul style="list-style-type: none"> Manual process of Background Check and Fingerprint data Teaching & Learning(T&L) relying on Legacy system (CACTUS) for CBR/BCI results 	<ul style="list-style-type: none"> Bureau of Criminal Investigation (BC) - Background Check and Fingerprint process (CBR) <ul style="list-style-type: none"> CBR/BCI information sent directly to UPPAC authorized users Speeds up the data of the CBR/BCI data to UPPAC 	<ul style="list-style-type: none"> USIMS is the source of truth, and we can move towards sunsetting the CBR/BCI features in the Legacy system Provides an automated process that saves manual entry hours and errors USBE is now 1 of 4 state agencies that has real time connection CBR/BCI updates 24/7
<ul style="list-style-type: none"> Educator Preparation Program (University Recommendation) Professional License <ul style="list-style-type: none"> Manual recommend of expired licenses Recommends are done through the Remote Desktop Service and through T&L as needed 	<ul style="list-style-type: none"> Educator Preparation Program (University Recommendation) Professional License <ul style="list-style-type: none"> Automation of recommends for Educators with an expired license Sets the foundation for Educator Licenses in USIMS 	<ul style="list-style-type: none"> Framework of Educator License data lives in USIMS Recommends for expired educators licenses are now done in USIMS and not manually in the legacy system
<ul style="list-style-type: none"> Utah Professional Practices Advisory Commission (UPPAC) <ul style="list-style-type: none"> Excel spreadsheet is the source for Case creation Manual entry of case creation in an excel document 	<ul style="list-style-type: none"> Utah Professional Practices Advisory Commission (UPPAC) <ul style="list-style-type: none"> Allows case creation process to begin in USIMS Lays the foundation for the UPPAC process to live in USIMS as 1 place of entry 	<ul style="list-style-type: none"> Removes inherit risks associated with excel files being lost or corrupted UPPAC reliance on manual spreadsheet capture is reduced, data access and management is secured and auditable within USIMS

Educator Domain

Without USIMS Educator Domain	With USIMS Educator Domain	Positive Improvements
<ul style="list-style-type: none"> • Bureau of Criminal Investigation (BCI) - Background Check and Fingerprint process (CBR) <ul style="list-style-type: none"> ◦ Manual process of Rapback Renewal process ◦ Teaching & Learning(T&L) relying on Legacy system (CACTUS) for CBR/BCI results 	<ul style="list-style-type: none"> • Bureau of Criminal Investigation (BCI) - Background Check and Fingerprint process (CBR) <ul style="list-style-type: none"> ◦ Automated Rapback Renewal Process ◦ CBR/BCI results in USIMS ◦ Provide authorized LEA users Rapback tracked information ◦ Provide notification to Educator upon cleared CBR/BCI results 	<ul style="list-style-type: none"> • CACTUS is no longer necessary for background checks • Automated process that saves manual entry hours and errors • USIMS is the “one-stop shop” for CBR and BCI results. Fewer systems to access and update
<ul style="list-style-type: none"> • Assignments <ul style="list-style-type: none"> ◦ Assignments entered in multiple places manually ◦ Updated irregularly and only when necessary ◦ T&L relying on Legacy system manual process for assignment maintenance, reporting, and qualifications management 	<ul style="list-style-type: none"> • Assignments <ul style="list-style-type: none"> ◦ Framework to validate sharing of Educator Assignment information in USIMS is in place ◦ T&L mechanism for Educator assignment qualification maintenance/management 	<ul style="list-style-type: none"> • Assignments can be managed by the LEAs, updated easily in USIMS whenever a change in status happens • Removes manual entry in multiple systems as USIMS is the source of truth for assignment data • An educator can have multiple assignments – whether that’s in one LEA, or more

USIMS Educator: Current and Upcoming Work

Green

Recent

- ✓ Production Deployments
 - ✓ No known production issues that need to be addressed at this time
- ✓ Continued Automation Framework (Playwright) implementation which enables testing and verification transparency with user groups
- ✓ Production enhancements for CBR/BCI
- ✓ Started work on the Assignments Skeleton framework

Right Now

- CBR/BCI: Automate Rapback Renewal process for Educator
- CBR/BCI providing data/reports to T&L
- Released Educator Preparation Program (University Recommendation) Professional License Process to Westminster, Rocky Mountain, Utah and Utah Tech and eliciting feedback
- Assignments: Provide a mechanism through which LEAs/SISs can share Educator Assignment information with USIMS to minimize, if not entirely remove, the need to enter the same information in multiple places.
- Assignments: Provide a mechanism where T&L can maintain assignment qualifications for the state of Utah
- Met with several LEAs to discuss their assignment process in multiple systems

Upcoming

- Ongoing effort for "Right Now" feature development
- [Remove renewal hours requirement for Educators with Active assignment for the past 5 years](#)

Issues/Risks

- Amount of development work getting CACTUS features into USIMS poses a risk to DoD
- To ensure productive DoD discussions, we must concentrate on high-level objectives and avoid delving into excessive detail that detracts from our primary goals.

Until we can decommission CACTUS, edit functionality will be available and is mutually incompatible to USIMS.

Mitigation

- Ensure team focus is on delivery of Definition of Done items
- Dedicated team member to address Help Desk issues
- Organize team to concentrate on specific functional areas to help complete DoD dev tasks
- Solicit feedback and input from stakeholders/SMEs to validate proper functionality

[USIMS Dashboard Link](#)

USIMS Educator Domain July 2025 Definition of Done

Target: 01 July 2025

Based on requirements from [53E-3-518](#):

- **Bureau of Criminal Investigation (BCI) - Background Check and Fingerprint process Phase 2**
 - Automate Rapback Renewal process for Educator
 - Provide T&L CBR/BCI info in USIMS
 - Provide LEA Users CBR/BCI info in USIMS including: tracked or not tracked
 - Provide notification to Educator upon clearance of CBR/BCI results: cleared
- **Assignments**
 - Provide a mechanism through which LEAs/SISs can share Educator Assignment information with USIMS to minimize, if not entirely remove, the need to enter the same information in multiple places
 - Provide a mechanism where T&L can maintain assignment qualifications for the state of Utah
 - Provide a mechanism for LEAs to access the state assignment qualifications to easily manage their educator assignments
- **Remove renewal form requirement**
 - [Remove renewal hours requirement for Educators with Active assignment for the past 5 years](#)
- **Utah Professional Practices Advisory Commission (UPPAC)**
 - Integrate UPPAC Hearing
 - Release of Phase 2 Case Creation enhancements
 - Provide a mechanism through which authorized UPPAC users can administer UPPAC Holds that LEA users can view
 - Provide authorized LEA users the ability to view UPPAC Holds for authorized educators

USIMS Educator Domain July 2025 Definition of Done

Target: 01 July 2025

Based on requirements from [53E-3-518](#):

- **Educator Preparation Program (University Recommendation) Professional License Phase 2**
 - Rolling Release of University Recommendation functionality to Utah institutions/users
 - Start with Westminster, Rocky Mountain, Utah and Utah Tech – Functionality Completed
 - 2nd phase: Utah Valley, Weber
 - Phase 3: Release to the remaining universities
 - Incorporate improvements/feedback from rolling releases
 - Integrate Notification to Educators who have not acted on a University Recommendation as the 1-year mark approaches.
 - Foundations of Reading Cut Score changed to 240 (Required for Early Childhood Education, Elementary Education, and Special Education)
- **Consume Third Party Providers**
 - Incorporate desired Utah Educator Network (UEN) features in USIMS
- **LEA School Directory**
 - Provide the ability to do LEA Management (Districts and Schools)
- **LEA Specific Licenses**
 - a) Provide a mechanism for LEAs to request an LEA Specific License
 - b) Provide a mechanism for USBE/T&L to Process/Approve LEA Specific Licenses
- **Educator Licensing USIMS data reporting**
 - Provide the foundation for Data reporting & analysis to T&L for Educator Licensing Process for data reconciliation.
- **Address Tech Debt**
 - Eventhubs to CosmosDb events
 - Upgrade services to latest dotnet version
 - Move away from Azure functions to Web API-host in container apps



Utah State Board of Education

What Student Domain Improves: Backpack Capability

USIMS Student Domain	With USIMS Student Domain	Positive Improvements
<ul style="list-style-type: none">Reconciling learner profile data across different USBE systems and SIS systems can be inaccurate and take hours of manual workLocal data storage of data means risk of losing student data (i.e., natural disaster, etc.)	<ul style="list-style-type: none">A cloud based, single source for key student information including:<ul style="list-style-type: none">Statewide assessment results<ul style="list-style-type: none">RISE, UT Aspire +, ACT, Acadience ReadingGrowth ScoresStudent demographicsStudent attendanceCourse grades & historyTeacher data for courses taken<ul style="list-style-type: none">Yrs. experience, degree, licensing & endorsements	<ul style="list-style-type: none">Captures and provides a consolidated collection of student historical data so data isn't lost along the student journeyProvides data sets to track student progress over time & provides educators and administrators with more insights on students
<ul style="list-style-type: none">Data sets are accessed through separate vendor portals or manually collected, standardized and managed; taking educators and administrators away from doing more impactful workCurrent architecture makes it hard to respond to new requirements as LEA needs evolve	<ul style="list-style-type: none">A standardized, flexible SIS agnostic record of the student's journey that can expand and move with the student	<ul style="list-style-type: none">SIS's store, share, and aggregate in common ways that retain a student's academic history and informationResponds faster to new requirements and reduces associated costs with unnecessary rework

What Student Domain Improves: Backpack Capability

Without USIMS Student Domain	With USIMS Student Domain	Positive Improvements
<ul style="list-style-type: none">When a student moves from one LEA to another disparate records are often created thus making it difficult to reconcile the data.	<ul style="list-style-type: none">Identifies the student across LEAs including when a student is mid-transition between LEAs	<ul style="list-style-type: none">Reduced data duplicationIncreased awareness and access when services are required
<ul style="list-style-type: none">Some data sets (e.g. assessment results) are reported too late for educators to best help students when they need it.	<ul style="list-style-type: none">Student Backpack Learner Profiles that consolidate and provide the latest information for a student	<ul style="list-style-type: none">Aids LEAs in diagnosing, informing, and personalizing learners needs fasterPrepares the LEA to align resources faster for a new learner
<ul style="list-style-type: none">Difficult to control who has what access to data via manual controls	<ul style="list-style-type: none">Limit/restrict LEA access to Student Backpack based on enrollment status and authorized LEA's roles and rights	<ul style="list-style-type: none">Further secure learner profile data to only authorized LEAs at the right time
<ul style="list-style-type: none">No state-wide data standards<ul style="list-style-type: none">Data sync issuesUnnecessary duplicate auditing of informationOvercollection of data, including duplication via surveys	<ul style="list-style-type: none">A standardized data exchange API that allows LEAs to get Student Backpack data for existing and new students coming to their LEA	<ul style="list-style-type: none">Reduces manual handling and updating of dataFewer surveys to request data which was already sent – data is easily shared to those who need it

USIMS Student: Current and Upcoming Work

Green

Recent Wins

- ❑ Live Statewide Assessment Results: RISE
 - ❑ Consuming Live RISE Results from Vendor

Right Now

- ❑ Statewide Enrollment Exchange
 - ❑ Live Enrollment/Student Identity Data for Assessments in USIMS (SIF)
- ❑ Live Statewide Assessment Results: RISE
 - ❑ Sharing Live RISE Scores with LEAs

Upcoming

- ❑ Live Statewide Assessment Results: UT Aspire Plus
 - ❑ Consuming Live UT Aspire Plus Results from Vendor
 - ❑ Sharing Live UT Aspire Plus Results
- ❑ Live Attendance
 - ❑ Consuming Live UT Aspire Plus Results from LEAs
 - ❑ Sharing Live UT Aspire Plus Results
- ❑ Live Statewide Assessment Results: ACT
 - ❑ Consuming Live UT Aspire Plus Results
 - ❑ Sharing Live UT Aspire Plus Results

Issues/Risks

- Interoperability
 - ❑ Multiple student information systems (SIS) means a data standard is required and must be implemented by every SIS.
 - ❑ Capability testing of Assessment API completed by other SIS vendors
- Depth and breadth of Student Backpack and its definitions
 - ❑ Student backpack and its data is defined contextually based on need.
 - ❑ Identifying and defining, with consensus, the various use cases takes time and effort.
- Speed of Development
 - ❑ Deliver functionality to production faster

Mitigation

- Integration
 - ❑ Sharing documentation and joint Ed-Fi API integration testing with other SIS vendors so they can plan for integration.
- Engaging Stakeholders
 - ❑ Consistent roadmap review in Student FWG to increase understanding of the value of what is being built.
 - ❑ Visual representation of data to tease out further user cases
- Accelerate and continue focus on delivering value
 - ❑ Organizing teams based on specific subdomains to promote end to end ownership and delivery.
 - ❑ Focusing on delivering functionality in smaller increments so stakeholders can use and provide feedback faster.



Utah State Board of Education

USIMS Student Domain: July 2025 Definition of Done

Student Backpack: Real Student Data

Statewide Assessment Results

- RISE Scores
- UT Aspire Plus Scores
- ACT Scores
- Acadience Reading 3rd Grade Scores
- Prior Scores – Previous student scores for comparison

Assessment Growth Scores (SGP SPS)

- Student Growth Percentile (SGP)
- School Performance Scores
- Prior Scores – Previous student and school growth for comparison

Student Demographics Info

- Basic Characteristics
- Homelessness, Econ Disadvantaged, Immigrant
- Limited English
- Military Status
- Additional Data – Explore additional data to move with the student

Student Attendance

- Attended and Membership Days
- Absences (excused, unexcused, suspension)
- Prior Attendance – previous student data for comparison
- Additional Data – Explore adding Absences by Course

Course Grades and History

- Courses (number, title, core code, year)
- Grades/Credits
- Where Taken (LEA, school)
- When Taken (term, section, entry and exit)
- How Taken (online)
- Prior Course Grades and History – previous student data for comparison
- Additional Data – Explore additional data to move with the student

Teacher Data For Student Courses

- Yrs. experience
- Degree
- Licensing and endorsements

USIMS Student Domain July 2025 Definition of Done

Student Backpack: Expanding Data

WIDA Screener Scores

- Select WIDA Screener Info – (Proficiency Score and Proficiency Data)

Select SCRAM and IEP

- Select SCRAM Info
 - 1% indicator
 - Disability Type
 - Environment
 - Regular Placement
- Movement of Eligibility Evaluation Summary & Determination Report
- Explore movement of full IEP

504 Plans and Accommodations

- Explore Select Accommodation data
- Explore movement of 504 plans

Select Birth & Health (via URDC API)

- Sex indicated on Birth Certificate
- Birth Date
- Select Immunization Info (when received, history, etc.)
- Select Allergy Info

Other Candidates to Explore

- Any incident reporting needed ([53F-4-207](#)) Early Warning System and others)
- Other data sets as discovered

USIMS Student Domain July 2025 Definition of Done

Student Backpack: Functionality and Additional Work

Functionality

1. Statewide Enrollment Exchange

- Further Work on Identify Student Record Data Across Multiple LEAs

2. Student Data Access and Permissions

- Enhancements to Further Improve Access Levels and Security
- Explore Learner Profile Level Permissions

3. Student Backpack Movement Between LEAs

- Sharing *Live* Backpack Data from State to LEA (each Learner Profile)
 - Additional enhancements as identified and prioritized
- Sharing *Live* Backpack Data from LEA to State (each Learner Profile)
 - Additional enhancements as identified and prioritized

4. E-Transcripts

- Providing transcripts for grades 9-12 in Electronic format

Additional Work

Documenting Data Usage

- Documenting why and how we are capturing, storing and using Backpack data

SIS Integration Support with LEAs

- Any supporting work with LEAs and SIS vendors to ensure data is transmitting correctly

What USIMS Finance Improves

Without USIMS Finance	With USIMS Finance	Positive Improvements
<ul style="list-style-type: none">Manual uploads/submissions of financial data by LEAs to USBEReactive: USBE can only receive financial data from LEAs at the end of the fiscal year<ul style="list-style-type: none">Lacking any monitoring capability or ability to identify early symptoms of potential issuesMostly static accounts available to LEAs each fiscal yearLimited ability to link financial submissions to other USBE or other Utah platforms (no “apples to apples” comparisons)	<ul style="list-style-type: none">Automate financial submissions using APIs for LEAs using USIMS supported financial platformsProactive: Ability to monitor & identify LEA financial issues before they growUSBE Finance can add & change accounts/combinations available to LEAs when necessaryUtilize Ed-Fi standards for financial data submissions	<ul style="list-style-type: none">Improves the quality & potential frequency of data USBE receivesProvides capability to expand Accounts & Account Combinations available to LEAsBetter financial information for audits and grant applications through customization and sharingAbility to more directly link student performance to state funding initiativesIdentify data which is consistent throughout LEAs quickly and at multiple levels

Finance – Current and Upcoming Work

Green

Recent Wins

- ✓ USIMS is working with seven vendor teams connecting to the Finance API, two have sent account information to USBE
- ✓ Provided instructions to the FWG for Account and Account Combination (Rule) Searches using USIMS
- ✓ Provided each 3rd-party Finance vendor a unique Azure ID & Secret

Right Now

- Supporting 3rd-party Finance vendors as they connect to the USIMS Finance API
- Gather feedback from more LEAs on Account & Account Combination searches using USIMS
- Finishing validations for Indirect Cost calculations

Upcoming

- Securely provide some LEAs individual Azure ID/Secret
- Continue incorporating feedback to the Finance API
- Implement UI functionality for USBE Finance to manage Accounts & Account Combinations
- Exceptions components of Indirect Costs

Issues/Risks

Coordination with 3rd Party Finance Vendors – balancing stakeholder feedback related to the Finance API

Mitigation

Monthly updates to 3rd party finance vendors & responsive to their questions & feedback

[USIMS Dashboard Link](#)

USIMS Finance - FY 2025 Definition of Done

Finance API Improvements

- Supporting vendors as they test and connect to USIMS
- Show budget/actual submissions from LEAs
- Ongoing improvements to the Finance API

Indirect Cost - Carry Forward Calculations

- Implement LEA ability to enter in adjustments (leave, contracts, building space) for Indirect Costs
- Utilize Actual submissions to handle carry forward calculations
- Address Indirect Cost feedback across base, adjustments, & calculations

Manage Financial Accounts & Combinations

- Allow USBE to manage (add/edit/retire) individual Accounts
- Allow USBE to manage (add/edit/retire) Account Combinations
- Tracking LEA requests for updated Account Combinations

Upcoming Events

Date	Event / Meeting	Purpose
Every Tuesday	Educator Focus Working Group or Sprint Review	Working Groups provide continued iterative detail capture and incremental development for future sprint work while reviews inspect the outcome of the Sprint and determine future adaptations
Every other Monday	Student Focus Working Group and Sprint Review	
Every other Wednesday	Finance Focus Working Group and Sprint Review	
October 9, 2024, at 4:00 pm	Functional Advisory Board	Quarterly Review of completed and upcoming work
October 21 – 25, 2024	USIMS On Site	Provide in person conversations between development teams and the community