

# USIMS Program Management Review

Utah State Board of Education

March 2026

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## Executive Summary

### Why USIMS Exists

USIMS was proposed to the legislature following an external study by the Division of Technology Services (DTS) recommending a build vs. buy implementation approach. The Utah State Board of Education manages education data for over 650,000 students and 36,000+ educators across 28 disparate legacy applications and subsystems. The three core legacy systems (CACTUS for educator licensing, UTREx for student data, and UPEFS for finance), along with their 25 associated subsystems, were developed on an ad-hoc basis over many years, lacked integration, and required ongoing maintenance and development resources to sustain.

These systems place a significant burden on both USBE staff and LEAs, requiring ongoing coordination to identify and correct data quality issues. SIS vendors lack sufficient validation rules on their end, which means errors in LEA data entry flow into the system and require manual remediation efforts on both sides to meet state and federal reporting requirements. Several of these systems are outdated in an absolute sense. CACTUS originated in the late 1980s, UTREx was built in the early to mid 2000s, and UPEFS dates to the early 2000s. These systems have long outlived their intended technology lifecycle, and maintaining them grows more difficult and costly every year. USIMS was designed to subsume these legacy applications, modernize our technology infrastructure, and create a unified platform built on modern data standards through EdFi for all Local Education Agencies statewide.

### The Critical Constraint

USIMS operates under a hard subsumption deadline. All three legacy systems must be retired and LEAs fully transitioned to USIMS by July 1, 2027, or state FTEs will be trapped in perpetual dual-system maintenance with no contractor support. Meeting this deadline requires ruthless prioritization of all program work directly toward legacy retirement.

Any new requirement introduced during the active transition period carries significant risk to this deadline, whether originating from legislative action, board rule changes, or stakeholder requests. When implementation timelines are short, new requirements must be built into legacy systems that are actively being retired, and then built a second time in USIMS. This creates duplicate work, duplicate cost, and diverts capacity from the retirement work required to meet the deadline. The funding appropriated for USIMS was scoped to cover the original program requirements, and new requirements introduced beyond that original scope will require a separate funding request. USBE Information Technology and USBE leadership share

responsibility for consistently communicating this constraint to all stakeholders, both internal and external.

## Program Status Overview

### Funding Status

As of February 2026:

Funding Source	Allocated	Spent to Date	Encumbered	Uncommitted Remaining
State Funds	\$22,946,645.60	\$13,263,876.23	\$3,225,124.00	\$6,457,645.37
COVID Funds	\$16,300,000.00	\$16,308,265.98	\$0	\$0 (fully expended)
<b>Total</b>	<b>\$39,246,645.60</b>	<b>\$29,572,142.21</b>	<b>\$3,225,124.00</b>	<b>\$6,457,645.37</b>

### Current Adoption Metrics

**Educator Domain:** Every prospective educator in the state is now going through USIMS for background checks, ethics review, professional license renewal, and professional license printing (Associate & LEA-Specific License renewals and printing are done inhouse). All ten university educator prep programs are submitting recommendations through the system. We have 104 pilot users from 41 LEAs actively testing assignment and employment features.

**Student Domain:** Aspire is actively using Student Backpack assessment data across all 101 districts. The infrastructure required to receive, validate, and surface student data from LEAs is being built incrementally. Features are released to LEAs as the underlying infrastructure is ready, rather than as a single statewide rollout, ensuring data quality and stability at each stage.

**Finance Domain:** Finance domain features are not yet available for broad user testing. Finance functionality must reach a sufficient level of completeness before wider release. Partial data would risk inaccurate reporting on billions in federal and state funding. Account and Account Combination searches have been validated by USBE Finance staff. Pilot LEAs are actively testing the financial submission API on the backend.

## Educator Domain

### Production Functionality (Live)

What	Who Uses It	Why It Matters
Background checks and Ethics Review	All prospective Utah educators	Ensures that every educator completes mandatory safety clearances and professional ethics requirements before working with students
Professional license renewal and printing	Educators with Professional licenses	Eliminates paper submissions, reduces processing time, provides official documentation on demand
Educator licensing dashboard	All Utah educators with historical records	Gives educators visibility into their status without calling the state; reduces support requests
University recommendations	10 educator preparation programs (BYU, SUU, U of U, USU, Utah Tech, UVU, Weber State, WGU, Westminster, Rocky Mountain)	Streamlines transition from university programs to workforce with real-time verification
Comprehensive educator information access	All LEA HR/Admin staff	Provides all licensing, endorsement, assignment, and employment data in one place with no duplicate entry and no need to call the state
Assignment and employment entry (soft release)	104 pilot users from 41 LEAs	Testing replacement for legacy dual-entry process

### In Testing and Active Development

What	Who Uses It	Why It Matters
Enhanced assignment and employment features	104 pilot users from 41 LEAs	Validates assignment and employment workflows with real LEA users before statewide rollout, ensuring the system is ready to fully replace CACTUS for all LEAs

**Target Legacy Retirement Date: July 1, 2027**

## Student Domain

### Production Functionality (Live)

What	Who Uses It	Why It Matters
Student Backpack: Assessment results (RISE, UT Aspire Plus, ACT, Acadience)	Educators and parents (via SIS). Aspire actively using assessments across all 101 districts.	New LEA can immediately inform instruction and identify where students need help

### In Testing (SIS Integration and/or Active User Testing)

What	Who Uses It	Why It Matters
Student Backpack: Enrollment history	Educators and parents (via SIS). 6 of 8 SIS solutions (Aspire, Davis, Focus, Infinite Campus, PowerSchool, Skyward) actively integrating and/or testing.	New LEA immediately knows where a student previously attended; enables follow-up with prior school
Student Backpack: Assessment results (RISE, UT Aspire Plus, ACT, Acadience)	Educators and parents (via SIS). 5 of 8 SIS solutions (Davis, Focus, Infinite Campus, PowerSchool, Skyward) actively integrating and/or testing.	Helps LEA measure student progress and inform instruction; identifies where the student needs specific help
Student Backpack: Growth scores	Educators and parents (via SIS). 6 of 8 SIS solutions (Aspire, Davis, Focus, Infinite Campus, PowerSchool, Skyward) actively integrating or testing.	New LEA understands student progress compared to peers statewide; provides context on previous school performance
Student Backpack: Demographics	Educators and parents (via SIS). 6 of 8 SIS solutions (Aspire, Davis, Focus, Infinite Campus, PowerSchool, Skyward) actively integrating and testing.	New LEA can align students with appropriate programs (e.g., English Learner services)
Student Backpack: Attendance	Educators and parents (via SIS). 6 of 8 SIS solutions (Aspire, Davis, Focus, Infinite Campus, PowerSchool, Skyward)	New LEA understands participation patterns to inform instruction and identify needed assistance

What	Who Uses It	Why It Matters
	actively integrating and testing.	

### Currently Working On

What	Who Uses It	Why It Matters
Course grades and history	Educators and parents (via SIS)	New LEA and student can see full course data including grades, credits, when taken, and how taken (online, etc.); aids in mapping previous courses to new courses and credit
IEP Courier: Notifications	All Special Education staff statewide. Rollout to 5 pilot LEAs planned before end of March, full release target April 2026.	Immediate notification when a student with an IEP enrolls; provides new school with info needed to contact old school for additional information
IEP Courier: Sharing and Tracking	All Special Education staff statewide. Rollout to 5 pilot LEAs planned before end of March, full release target April 2026.	Facilitates the encrypted transfer of an IEP between LEAs; enables schools to match the right curriculum to a student's specific needs

**Target Legacy Retirement Date: July 1, 2027**

## Finance Domain

### Deployed: Validated by USBE Finance, Pending Broader Release

What	Who Uses It	Why It Matters
Chart of Accounts and Account Combinations viewing	All LEAs	Ensures statewide consistency in financial reporting; enables comparison between LEAs and federal reporting
Account and Account Combination management	USBE Finance staff	Respond quickly to legislative mandates without manual spreadsheet distribution to all LEAs

### In Testing

What	Who Uses It	Why It Matters
Finance API: automated submissions	Pilot LEAs with 8 finance system vendors. 1 vendor has successfully submitted data for their pilot LEA. 4 vendors are on track for submissions within the next 6 weeks.	LEAs can submit revenue and expense data directly from local systems; validates millions in LEA investment for 53E-3-518 compliance

### Currently Working On

What	Who Uses It	Why It Matters
Account Uniqueness for each Fiscal Year	USBE Finance and all USIMS Finance Users	Allows for components of each Account, such as its type or the Rules/Bills and Assistance Listing Number (for Programs)
Microservices architecture updates	Backend infrastructure	Ensuring scalable, maintainable architecture
Power BI reporting enhancements	USBE Finance, vendors	Improved troubleshooting and vendor coordination
Address timeout issues within the Finance API	3rd Party Finance vendors	Two vendors have reported this issue. Fix has been deployed and is awaiting confirmation.

**Target Legacy Retirement Date: End of FY 2027**

## Risks and Mitigation Strategies

### Critical Path Risks to Legacy Retirement

#### Educator Domain

**Risk:** Volume of CACTUS features requiring migration poses timeline risk to the July 2027 retirement deadline.

**Mitigation:**

- Team reorganized to focus exclusively on Definition of Done deliverables
- Dedicated team member assigned to helpdesk issues to separate production support from development work
- Team organized to concentrate on specific functional areas to accelerate Definition of Done completion
- Continuous feedback and input from stakeholders and Subject Matter Experts to validate proper functionality

#### Student Domain

**Risk:** Speed of development. As real student data is added, fixing critical bugs and optimizing for volume impacts delivery speed.

**Risk:** Interoperability. Multiple student information systems means a data standard is required and must be implemented by every SIS; individual SIS vendor roadmap timelines vary.

**Risk:** Depth and breadth of Student Backpack definitions. Identifying and defining use cases with consensus takes time and effort.

**Mitigation:**

- Accelerate delivering value by expediting LEA implementation feedback to address issues
- Make each real student data API available as soon as completed
- Share documentation updates as soon as available and respond to SIS vendor questions immediately
- Constant communication with SIS Vendors and Pilot LEAs to adjust targets for implementation as needed
- Consistent roadmap review in Student Focus Working Group (FWG) to increase understanding of value being built
- Reaching out through LEA-related meetings and communications to solicit input and Student FWG attendance

#### Finance Domain

**Risk:** Finance users are currently routed to the Educator Licensing page upon login, preventing access to deployed Finance features.

**Mitigation:** A dedicated Finance user card is in development to route users directly to Finance functionality upon login.

**Risk:** The Finance API supports data reporting for billions in federal and Utah funding, with 8 external vendors and all LEAs dependent on its accuracy. Vendor timelines and data confirmation add complexity to the testing cycle.

**Mitigation:** Power BI is being utilized to troubleshoot with vendors for Balance Sheet, Revenue, Expenditure, and Program Accounts and Amounts. Ongoing follow-up continues with vendors as they proceed with submissions using the USIMS Finance API.

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