SchoolLANDTrust.org
Fall Reporting for Principals
Due October 20, 2019

Log in to SchoolLANDTrust.org using the Login & Manage Account button in the top right corner.

This will take you to your school page. Fall reports must be completed in the correct order:
- Council Member and Signature Form
- Principal Assurance
- Final Report

Council Member and Signature Form
- Membership entered in Fall
- Select Type
  - Chair – must be parent; email address and phone number required
  - Vice Chair – can be parent or elected employee member; email address and phone number required
  - Principal / Director – information will automatically populate; cannot serve as chair or vice chair
  - Secretary – NOT the council secretary. Enter info for school secretary if you want the school secretary to be copied on email to the principal
  - Additional Member – select Contact Type – only email address required
    - Parent
    - Parent / Licensed District Employee
      - If a parent is employed by the district at a different school, please choose this contact type – The law requires a majority of parents serving on the council to NOT be licensed district employees. If a parent is a licensed district employee at the school where they serve, they may not serve as a parent member.
    - School Employee
- When complete, click SUBMIT. If an error message is received, make necessary corrections.

Principal Assurance
- Answer questions honestly and completely – answers help identify training needs
- Compliance Questions
  - Questions answered NO must be explained at the bottom of the form
- Election Questions
  - Outline proper election policy
  - Except for appointments to fill mid-term vacancies, the only member of the council that is not elected is the principal. The council cannot have other appointed members.

Final Report for the Previous Year
- All information from preparing previous year plan is already populated on the form
- District Business Administrator (DBA) has entered actual expenditures from previous year that were coded to the Trust Land budget.
- Chart at top of report compares budgeted amounts from plan, amounts you will enter on this final report, and amounts reported by the DBA. Please review this to make sure funds were spent according to plan and reported correctly
- Report on each goal by clicking COMPLETE ANSWERS to the right of the Goal number
- Entering expenditures
  o Click on underlined category
  o List actual amount spent
  o Only enter Actual Use/As Described if it is near the amount budgeted and was spent according to plan; if not, add description
- Carry over > 10%
  o Was the plan implemented as approved?
- Increased Distribution / Unplanned Expenditures section – Adding a new expenditure category
  o To report spending from Increased Distribution answer in plan or an approved amendment
  o Type a brief reason for the increase in the text box
  o Click ADD UNPLANNED EXPENDITURE
    ▪ Select budget category for the expenditure
    ▪ Briefly describe the actual use and cost and if it related to the increased distribution or an approved amendment
- Policy Makers
  o Click ANSWER
  o Has not been working for all principals; if not, just skip and click SAVE
- When complete, click SUBMIT. If an error message is received, make necessary corrections.

Please contact us with any questions or concerns. We appreciate all you do!

USBE School Children's Trust Section

Paula Plant	Natalie Gordon	Karen Rupp
paula.plant@schools.utah.gov	natalie.gordon@schools.utah.gov	karen.rupp@schools.utah.gov
801-538-7555	801-538-7533	801-538-7764