

2026-27 LEA/PSA Planning Form

District/PSA:

This form should be completed or updated for each school year. It should be prepared by program staff and forwarded to the auditor for use in planning the field audits.

1. Have any buildings closed?

- Yes No

If yes, please list:

2. Are there new buildings/grades?

- Yes No

If yes, please list:

3. Identify the key program personnel involved in the pupil membership count, including those involved in GAD, EEM, days & hours, and shared-time programs.

NAME	TITLE	PROGRAM	BUILDING	PHONE	EMAIL ADDRESS	YEARS IN POSITION

4. For each building (including shared-time, early childhood, alternative education) at which the district provides instruction, complete:

BUILDING/PROGRAM	EEM ENTITY CODE (building code)	ADDRESS/PHONE #	BUILDING GENERATES FTE	GRADE LEVELS/CLASS OF PUPILS
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

5. List the buildings in which your district offers ECSE (Early Childhood Special Education) Programs:

BUILDING	PROGRAM	AM – PM - BOTH
	<input type="checkbox"/> 1754 <input type="checkbox"/> 1755 <input type="checkbox"/> 1862	
	<input type="checkbox"/> 1754 <input type="checkbox"/> 1755 <input type="checkbox"/> 1862	
	<input type="checkbox"/> 1754 <input type="checkbox"/> 1755 <input type="checkbox"/> 1862	
	<input type="checkbox"/> 1754 <input type="checkbox"/> 1755 <input type="checkbox"/> 1862	

6. One major purpose of the planning form is to provide the auditors with information about any significant changes that would affect completion of the audit. Following is a checklist of common items. Please indicate if there have been any significant changes and attach documentation as applicable.

- Written procedures for ensuring a complete and accurate pupil count
- Program locations or types of program categories
- Systems (automated/manual) for maintaining enrollment and attendance records
- Continuity in key participant membership count positions
- Participation in cooperative agreements with other local programs
- Record retention procedures and practices (minimum of three years plus current year)
- Procedures to ensure that administrative personnel document in writing their review of the completed program alpha lists, including a representation that all program documentation is on file in accordance with state laws
- Training of new staff without experience in membership accounting rules and procedures

7. Upload a copy of your district’s course catalog and course descriptions to Rever.

8. Name of your district’s Student Information System: _____

9. Current district approved method for documenting attendance: _____

10. Check the type of schedule provided in your secondary buildings:

<input type="checkbox"/> Semester	<input type="checkbox"/> Block	<input type="checkbox"/> Trimester
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11. When does your 2nd semester or 2nd trimester start: _____

12. If your buildings operate on a block schedule, did you run a speed day on the count day?

- Yes No N/A

13. Do you have 3rd party vendors (such as MI Virtual Academy or Edmentum) providing educational services to your virtual learners?

- Yes No N/A

14. If yes, please list the names of the organizations operating program and describe the nature of those arrangements: _____

15. Are you maintaining the pupil accounting records for the current year plus three years?

Yes No

16. Do you have access to the Pupil Accounting Manual?

Yes No

Completed by:	
Name:	
Title:	
Date Completed:	