

School Board Officers and Key Contacts Instructions

Information Update Due Date: November 1

Complete data collection on the web at <http://www.edinfo.state.ia.us/>
ID and password are the same as for the BEDS

If you have any questions, contact Marcia Krieger at:

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Start-up screen

USER ID and PASSWORD are individually assigned. The superintendent or chief administrator is usually the party responsible for granting access to data collections on the secure website. Click on the **submit button** to go to the next screen.

Application menu screen

Click on the gray bar labeled **School Board Officers** to enter into the forms section of this website.

Click on the gray bar labeled Exit to leave this screen and return to the start up screen.

Corrections

Corrections can be made to the listing of school board officers for changes in board membership at any time during the year. The School Board Officers data collection is always “available” and does not go to “browse only” mode.

Summary and Entry Forms

The on-line program begins on the School Board Officers summary page.

To the left of each current board officer’s name is an EDIT button. Click on this button to edit existing information. A new window will appear on which the information can be changed. To save newly entered information click on UPDATE. Click on ABANDON to not save the information and return to the main page.

To the right of each current board officer’s name is a DELETE button. Clicking on this button will eliminate the record.

Click on the ADD button to go to an entry form.

On the entry form, enter the board officers, one officer at a time. After each officer is entered, click the update button, and then click the add button to enter the next officer. Continue this process of “add-update” until all officers have been entered.

Title. Select the officer’s or individual’s title from the dropdown menu. The choices are:

President
Vice-president
CFO/School Business Official (SBO)

Board Secretary and Treasurer
 Board Member (select as many times as necessary to list all board members)
 Buildings & Grounds
 Transportation Director/Supervisor
 Auditor
 Accounting Software Provider
 Additional Financial Officer 1
 Additional Financial Officer 2

Enter the SBO even if it is the same person as the Secretary or Treasurer. Every district/AEA shall identify a person who is the SBO. A district may enter up to two additional business office personnel who will also receive emails related to financial information. Enter Buildings & Grounds and Transportation Director/Supervisor, but if there is no one in those positions, type "None" in the last name field. Do not enter the superintendent as the SBO, Buildings & Grounds, or Transportation Director/Supervisor.

Last Name. This field will not appear for the Auditor and Accounting Software Provider. On all others, enter the individual's last name.

First Name. This field will not appear for the Auditor and Accounting Software Provider. On all others, enter the individual's first name.

P. O. Box, Street Address, City, and Zip Code. Enter the home address for the president, vice-president, and board members. Enter the official school address for the secretary, treasurer, SBO, Buildings & Grounds, and Transportation Director/Supervisor. Enter the business address for the Auditor and Accounting Software Provider.

State. Iowa has been entered for you.

Email. If the district provides separate official email addresses for board officers, enter those emails. Otherwise, enter the home email for board members. Enter the official school email address for the secretary, treasurer, SBO, Buildings & Grounds, Transportation Director/Supervisor, and Additional Business Office Personnel. Enter the Contact Name's email address for the Auditor and Accounting Software Provider.

Phone. Enter the home phone number for the president, vice-president, and board members. Enter the official school phone number for the Secretary, Treasurer, SBO, Buildings & Grounds, Transportation Director/Supervisor, and Additional Business Office Personnel. Enter the business phone for the contact listed under "Contact Name" for the Auditor and Accounting Software Provider.

Term End. Enter the month and calendar year in which the term of the president, vice-president, and each board member ends. Leave blank for secretary, treasurer, and SBO. Elections take place in September (month 09) but officers do not begin their term until sworn in, which could be in October (month 10). Accurately portray the month of the actual term.

Audit Firm's Name / Software Provider Name. For Audit Firm or Accounting Software Provider, enter the name of the audit firm or the name of the software provider company, as appropriate.

Contact Name. For contact name, enter the first and last name of the lead auditor from the audit firm/or the primary contact with the software provider company.