



2015–16 Federal Program Monitoring Agency Training

California Department of Education Monitoring Tool (CMT) Overview

August 4–5, 2015 Pomona

August 12–13, 2015 Sacramento



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of Public Instruction

Presentation Overview

- Access and Roles
- Agency Document Management
- Responding to Evidence Requests
- Agency CMT Screens
- Resolution of Findings



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What's New?

- LEAs are now referred to as Agencies
- Agency focus shift from instrument item to evidence request



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FPM Participating Programs

- Adult Education and Family Literacy Act (AEFLA)
- Before and After School Programs (BASP)
- Career Technical Education (CTE)
- Compensatory Education (CE)
- Early Education and Support (EES)
- Education Equity (EE)



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FPM Participating Programs

- English Learner (EL)
- Fiscal Monitoring (FM)
- Homeless Education (HE)
- Improving Teacher Quality (ITQ)
- Migrant Education (ME)
- Neglected or Delinquent (NorD)
- Physical Education (PE)
- Uniform Complaint Procedures (UCP)



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Key Roles in the FPM Process

- **COE Monitoring Lead**
 - Supports agency staff with CMT
 - In partnership with the CDE to provide support to agencies in the monitoring process
- **Agency Review Coordinator**
 - Coordinates the review
 - Primary contact between the Agency and CDE



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Key Roles in the FPM Process

- **Regional Team Leader (RTL)**
 - Plans, schedules, coordinates and monitors the progress of the review.
- **Program Reviewers**
 - Program experts responsible for verifying that agencies meet legal requirements for their funding source



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User Access

- Same as CARS
- If one does not regularly use CARS, there is a link in CMT to obtain a CAS username and password



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CAS

Centralized Authentication System



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CAS

What is it?

- CAS is CDE's system for establishing a system user account.
- The California Monitoring Tool (CMT) will use CAS for managing user accounts.



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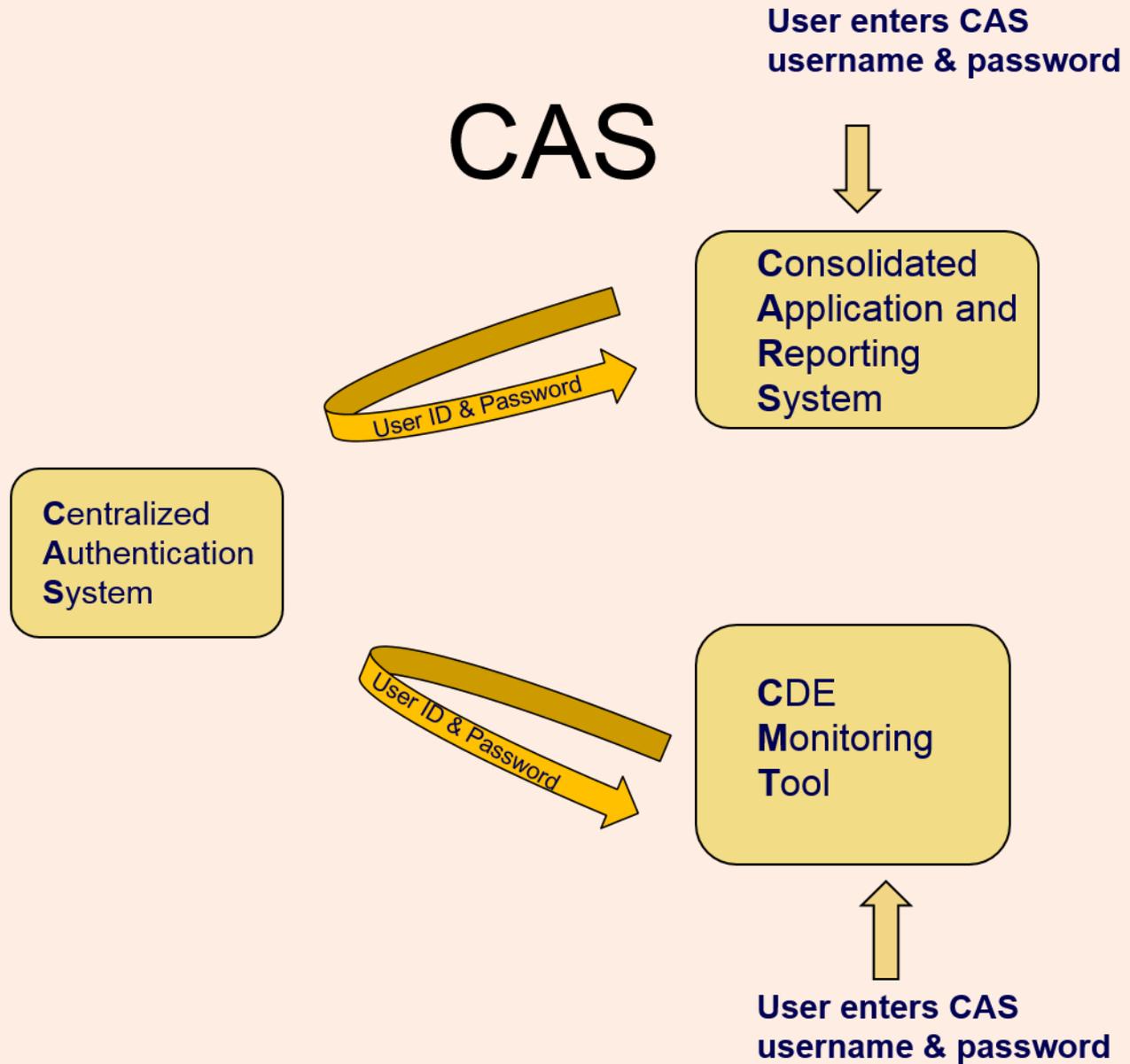
CAS

What does that mean?

- CAS is ONLY for user information, nothing else.
- It is a stand alone system that manages user information so that different CDE systems can share the same user ID and password.
- Logging onto CMT will use your CAS established username.



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CAS

New User Registration

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Centralized Authentication System (CAS)

Logon

Username:

Password:

[New User Registration](#)
[Forgot Password](#)
[CDE Monitoring Tool Logon](#)

Questions: Federal Program Monit



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Centralized Authentication System (CAS)

Registration

Instructions:

- The fields marked with an asterisk (*) are required
- Passwords expire every 90 days
- Cannot reuse last 24 passwords
- Passwords must have at least 8 characters including letters, numbers, and special characters (!, @, #, \$, ^, &, *, -, +, _, ., ?)
- Passwords must contain at least one uppercase letter, at least one lowercase letter, and at least one special character
- The format for Telephone and Fax numbers is 555-5555

Association Type

* Association Type: District School Private

* County

* District

User Information

* Username:

* First Name:

* Last Name:

* Password:

* Confirm Password:



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User Information

* Username:

* First Name:

* Last Name:

* Password:

* Confirm Password:

Primary Telephone

* Area Code: * Telephone: Extension:

Secondary Telephone

Area Code: Telephone: Extension:

Fax Area Code: Fax:

* E-mail Address:

* Confirm E-mail:

Security Questions

* Security Question:

* Security Answer:

* Security Question:

* Security Answer:

Submit Registration



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CAS

Write down your username, password, security questions & answers and keep them somewhere secure.

Security Questions	
* SecurityQuestion	Select one...
* SecurityAnswer	What is the name of your favorite childhood friend?
* SecurityQuestion	When you were young, what did you want to be when you grew up?
* SecurityAnswer	What is the name of your sixth grade teacher?
* SecurityQuestion	What school did you attend in the third grade?
* SecurityAnswer	What is the middle name of your maternal grandmother?
* SecurityQuestion	What did you want your childhood nickname to be?
* SecurityAnswer	Where were you when you met your spouse's significant other?
	What street did you live on in the fifth grade?
	What is your oldest sibling's middle name?
	What was the name of your first stuffed animal?
	What was the name of your second pet?
	What is your favorite flower?
	In what city did your mother and father meet?
	From which teacher did you receive your worst grade?
	What was your child's first word?
	What was the model of your first car?

onappsupport@cde.ca.gov

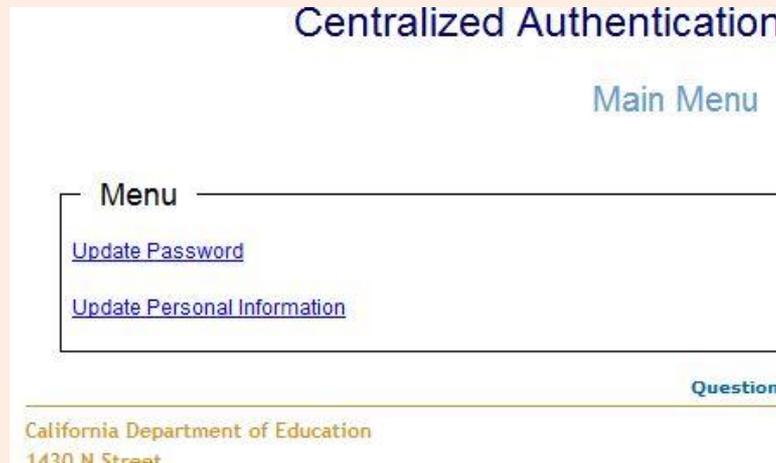
California Department of Education
430 N Street
Sacramento, CA 95814



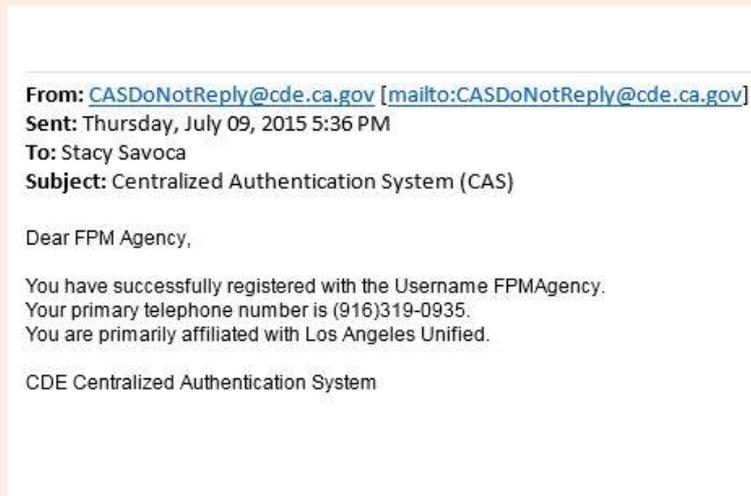
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CAS

Main Menu screen when you have successfully registered and logged in to CAS.



You will also receive an Email Confirmation





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CAS

Forgot Password

California Department of
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Centralized Authentication System (CAS)

Logon

Username:

Password:

[New User Registration](#)
[Forgot Password](#)
[CDE Monitoring Tool Logon](#)

Questions: Federal Program Monit



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CAS

Forgot Password

Instructions: All fields are required.

User Information

Username:

E-mail Address:

Security Question:

Security Answer:

Submit

[Reset password using information in E-mail.](#)
[Logon to Centralized Authentication System](#)

Questions:



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CAS

Forgot Password

Centralized Authentication System (CAS)

Forgot Password

An E-mail has been sent to the address provided. It may take a few minutes to receive it. Use that information to create your new password.

[Reset password using information in E-mail.](#)
[Login to Centralized Authentication System](#)

Questions: Federal Program Monitoring Office | CMT@cde.ca.gov



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CAS

Forgot Password

Reply Reply All Forward IM

Mon 7/13/2015 9:56 AM

 CASDoNotReply@cde.ca.gov
CDE Centralized Authentication System

To  Arik Rub

You are in the process of resetting your password for CDE's Centralized Authentication System. Your Temporary UserID is 871AE01A- 47C3-B07C-E89BF11CA15B.

Please go to <https://www3.cde.ca.gov/cdeauthentication/resetlogon.aspx?programabbr=CMT>. This Temporary UserID is good for three hours. If the time expires, you will need to go to the Forgot Password link again.

“You are in the process of resetting your password for CDE's Centralized Authentication System. Your Temporary UserID is 871AE01A-47C3-B07C-E89BF11CA15B. Please go to <https://www3.cde.ca.gov/cdeauthentication/resetlogon.aspx?programabbr=CMT>. This Temporary UserID is good for three hours. If the time expires, you will need to go to the Forgot Password link again.”



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- Passwords must contain at least one uppercase letter, at least one lowercase letter, and at least one special character

Reset Logon

Temporary UserID:

New Password:

Confirm Password:

Submit

[CDE Monitoring Tool Logon](#)

[Forgot Password](#)

[Logon to CAS](#)

[Questions: Federal Program](#)



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Agency Access

- Agency users have access to functionality based on their assigned role
- FPM Office assigns agency review coordinator
- Agency review coordinator assigns agency staff as needed



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User Management

CDE MONITORING TOOL (CMT)

ABC Unified (19642120000000)

- Home
- Reviews
- Documents
- Evidence Requests
- Certify Evidence
- Reports
- Users**

User Management Add a User

User Management

Agency and Agency Review Users

To change a user's activity status or roles, click on Edit to the right of the User Name.

To add a new user, select "Add a User" above. All new users must register in the [CDE Authentication System \(CAS\)](#) first.

5 User(s) found.

User Name	First Name	Last Name	Email	Agency/Review Roles	Edit
ArikRub	Arik	Rub	ARub@cde.ca.gov	<ul style="list-style-type: none"> ■ AgencyStaff 	Edit
ssavoca	Stacy	Savoca	ssavoca@cde.ca.gov	<ul style="list-style-type: none"> ■ AgencyStaff 	Edit
FPMAgency	FPM	Agency	ssavoca@cde.ca.gov	<ul style="list-style-type: none"> ■ Agency_ReviewCoord ■ Agency_ReviewStaff ■ Agency_ReviewSiteStaff ■ Admin ■ UserAdmin ■ AgencyStaff 	Edit
peggy	Peggy	Bundy	peggy@abcunified.edu	<ul style="list-style-type: none"> ■ Agency_ReviewCoord 	Edit
boss	Boss	OfBundy	boss@abcunified.edu	<ul style="list-style-type: none"> ■ Admin ■ AgencyStaff 	Edit



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Agency Screens

- The next slides show views for the 2015-16 ABC USD review
- Examples have valid and fictitious information

Agency Home



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CDE MONITORING TOOL (CMT)

Logged on as joeConsultan

ABC Unified (19642120000000)

[Logoff](#)

Home

Reviews

Documents

Evidence Requests

Certify Evidence

Reports

Users

Hi FPM Agency! Reviews listed below are currently open and assigned to the selected agency. Use the Reviews tab to search all reviews, including closed reviews.

2015-16 FPM Review On-site 12/7/2015 - 12/11/2015 [View Summary](#)

Instrument	Evidence Requests Incomplete	Evidence Deadline	Reviewer(s)
AE: Adult Education	1	11/7/2015	Arik Rub
BASP: Before and After School	0	11/7/2015	Arik Rub
CE: Compensatory Education	7	11/7/2015	
CTE: Career Technical Education	2	11/7/2015	Arik Rub
EE: Education Equity	0	11/7/2015	Jessica Gray
EES: Early Education and Support	0	11/7/2015	Jessica Gray
EL: English Learner	0	11/7/2015	Jessica Gray
HE: Homeless Education	6	11/7/2015	Arik Rub Stacy Savoca
ITQ: Improving Teacher Quality	4	11/7/2015	Arik Rub Stacy Savoca
NorD: Neglected or Delinquent	2	11/7/2015	Stacy Savoca
PE: Physical Education	0	11/7/2015	Stacy Savoca
UCP: Uniform Complain Procedures	0	11/7/2015	Arik Rub

Known Issue Resolved

Resources for time based calculator is updated and working.

What's New

Updated [2015-16 FPM](#) are posted.

Stay Informed

To ensure you get the most up-to-date information on the FPM reviews and CMT join our email list. To join, [click here](#) and send a blank message.

Site Maintenance:

CMT standing system maintenance Fridays from 3:00 p.m. to 5:00 p.m. System may not be available.

General CMT Questions: FPM Office | CMT@cde.ca.gov | 916-319-0935



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Review Summary

CDE MONITORING TOOL (CMT)
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ABC Unified (19642120000000)
[Logoff](#)

Home | Reviews | Documents | Evidence Requests | Certify Evidence | Reports | Users

2015-16 FPM Review

This is an on-site review. For information about Federal Program Monitoring go to [Compliance Monitoring](#) on the CDE website.

On-site Details: EE late entrance

Review Stage: Pre-Review
Review Dates: 12/7/2015 - 12/11/2015
Evidence Deadline: 11/7/2015

Instrument	Evidence Requests Incomplete	Reviewer(s)	Agency Program Staff
AE: Adult Education	1 Requests	Arik Rub 916-319-0934	Maria Machado 562-926-5566 Ext. 21162
BASP: Before and After School	0 Requests	Arik Rub 916-319-0934	Lynette Miller 562-926-5566 Ext. 21136
CE: Compensatory Education	7 Requests	Consult RTL	Lisa Davis 562-926-5566 Ext. 21136
CTE: Career Technical Education	2 Requests	Arik Rub 916-319-0934	Lynette Miller 562-926-5566 Ext. 21136
EE: Education Equity	0 Requests	Jessica Gray 916-319-0585	Toan Nguyen 562-926-5566 Ext. 21257
EES: Early Education and Support	0 Requests	Jessica Gray 916-319-0585	FPM Agency 916-319-0935 Peggy Bundy 916-555-5555
EL: English Learner	0 Requests	Jessica Gray 916-319-0585	Lisa Davis 562-926-5566 Ext. 21136 Toan Nguyen 562-926-5566 Ext. 21257
HE: Homeless Education	6 Requests	Arik Rub 916-319-0934 Stacy Savoca 916-319-0502	Lynette Miller 562-926-5566 Ext. 21136
ITQ: Improving Teacher Quality	4 Requests	Arik Rub 916-319-0934 Stacy Savoca 916-319-0502	Lisa Davis 562-926-5566 Ext. 21136

RTL(s):
Ramiro Nava, 916-319-0375

Agency Coordinator(s):
FPM Agency, 916-319-0935
Peggy Bundy, 916-555-5555

Review Sites

Cerritos High
(19642121930056)
[CTE](#)

ABC Adult
(19642121930346)
[CTE](#)

Artesia High
(19642121930361)
[CTE](#)

Whitney (Gretchen) High
(19642121931880)
[CTE](#)

Gahr (Richard) High
(19642121933159)
[CTE](#)

Melbourne (Ella P.) Elementary
(19642126010912)
[CE](#) [EL](#) [BASP](#)

Tracy HS Infant Center
(6473)
[EES](#)



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Review Summary

CDE MONITORING TOOL (CMT)
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Home
Reviews
Documents
Evidence Requests
Certify Evidence
Reports
Users

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Review Sites

Cerritos High
(19642121930056)
[CTE](#)

ABC Adult
(19642121930346)
[CTE](#)

Artesia High
(19642121930361)
[CTE](#)

Whitney (Gretchen) High
(19642121931880)
[CTE](#)

Gahr (Richard) High
(19642121933159)
[CTE](#)

Melbourne (Ella P.) Elementary
(19642126010912)
[CE EL BASP](#)

Tracy HS Infant Center
(6473)
[EES](#)

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Document Management

- Agency reviews program instruments on the FPM Web
 - <http://www.cde.ca.gov/ta/cr/programinst1516.asp>
- Identifies the appropriate evidence
- Uploads document(s) in the Agency document tab

Document Management



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Home
Reviews
Documents
Evidence Requests
Certify Evidence
Reports
Users

Agency Documents

Filter by Type: All

10 Document(s) found.

Document	Updated	Edit/Delete
ABC SARC web site All of our SARCs can be found at this web address. http://www.abcsud.k12.ca.us/pages/ABC_Unified_Scho...	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
ABC PARs Some kind of sample PARs PARs-Sample.xlsx	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
General Ledger Some general ledger entries. Ledger-Sample-2015.xlsx	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
Private School Affirmations Some examples of our outreach to private schools Private-Outreach-Materials.pdf	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
ABC SPSA This is a summary document that describes... SPSA-Overview-2015-01-15.pdf		Edit Delete
ABC SPSA Title I Allocation Allocations outlined to show school and reservations. SPSA-Alloc-2015-01-15.pdf	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
Melbourne School Site Improvement Plans Architectural drawings related School Site Improvement funds were allocated to Melbourne in 2014 for a new library.	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
a test test http://www.amazon.com/books-used-books-textbooks/b...	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
a file to upload a file to upload CMT-Link-Prioritization.xlsx	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete
Walton spsa asdf asdf SPSA-Walton Middle.docx	07/15/15 11:17PM, Joe Consultant (jconsultant)	Edit Delete

Add a Document

Document Title:

Description:

Document Type:
File

General CMT Questions: FPM Office | CMT@cde.ca.gov | 916-319-0935



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Document Management

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Home
Reviews
Documents
Evidence Requests
Certify Evidence
Reports
Users

Agency Documents

Filter by Type: By Title/Name:

10 Document(s) found.

Document	Updated	Edit/Delete
ABC SARC web site All of our SARC's can be found at this web address. http://www.abcsud.k12.ca.us/pages/ABC_Uniform_Scho...	07/15/15 11:17PM, Joe Consultant (jconsultan)	Edit Delete
ABC PARs Some kind of sample PARs PARs-Sample.xlsx	07/15/15 11:17PM, FPM Reviewer (fpmreviewer)	Locked
General Ledger Some general ledger entries. Ledger-Sample-2015.xlsx	07/15/15 11:17PM, Joe Consultant (jconsultan)	Edit Delete
Private School Affirmations Some examples of our outreach to private schools Private-Outreach-Materials.pdf	07/15/15 11:17PM, Joe Consultant (jconsultan)	Edit Delete
ABC SPSA This is a summary document that describes... SPSA-Overview-2015-01-15.pdf	07/15/15 11:17PM, FPM Reviewer (fpmreviewer)	Locked

Add a Document

Document Title:

Description:

Document Type:

General CMT Questions: FPM Office | CMT@cde.ca.gov | 916-319-0935



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Evidence Requests

- The agency selects the Evidence Request and links the appropriate documents from the Agency Document tab
- The agency certifies each evidence request
- Agencies no longer submit program instruments

Evidence Request



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Logged on as **joeConsultan**

ABC Unified (1964212000000)
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Home Reviews Documents Evidence Requests Certify Evidence Reports Users

Evidence Requests

Select an Evidence Request below to link appropriate documents. Document links to a particular Evidence Request make up a Response which must be certified in order for CDE staff to see the documents.

By Instrument: By Name:

24 Evidence Request(s) found.

Instrument	Evidence Request	Doc Links	Required	Request Status	Response Status
AE	General Ledger	0	Y	Incomplete	
CE	Consolidated Application and Reporting System (CARS)	0	Y	Incomplete	Draft 07/16/2015 2:00AM FPM Agency (FPMAgency)
CE	Personnel Activity Reports	1	Y	Incomplete	Draft 07/16/2015 2:00AM FPM Agency (FPMAgency)
CE	School Accountability Report Card (SARC) hard copy	0	Y	Currently sufficient	Certified 07/16/2015 2:00AM FPM Agency (FPMAgency)
CE	School Accountability Report Card (SARC) Web page URL	1	Y	Currently sufficient	Certified 07/16/2015 2:00AM FPM Agency (FPMAgency)
CE	Single Plan for Student Achievement	2	Y	Incomplete	
CE	LEA Parent Involvement Policy	0	Y	Incomplete	
CE	LEA Plan	0	Y	Incomplete	



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Evidence Request

CDE MONITORING TOOL (CMT)
Logged on as FPMAgency

ABC Unified (19642120000000)
[Switch Agency](#) | [Logoff](#)

Home | Reviews | Documents | Evidence Requests | Certify Evidence | Reports

Evidence Request

CE: Personnel Activity Reports

Description: PARs should include actual daily hours spent, not estimates or percentages, for each resource code and include appropriate signatures.

Related Items: [CE 19](#)

New Document Link:

AgencySite	Document	Remove
Agency	ABC PARs Some kind of sample PARs	Remove

Last Saved: 07/16/2015 9:44AM, Joe Consultant (joeConsultan), Certified

Other Instruments with the same evidence request

Click "Add Links" below next to each instrument, where you would like to automatically generate document links using the document links above. Note: where Agency or Site links may not be relevant, document links will not be added. See ... for more information.

Instrument	Add Latest Links	Required	Related Items
CTE: Career Technical Education	Link	Y	CTE 05 , CTE 06
HE: Homeless Education	Link	Y	HE 10
NorD: Neglected or Delinquent	Link	Y	NorD 12

[Add a Comment](#)

 Regarding:

[CE Comments](#) [View Thread](#)

General CMT Questions: FPM Office | CMT@cde.ca.gov | 916-319-0935



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Certify Evidence

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Home Reviews Documents Evidence Requests Certify Evidence Reports Users

Certify Evidence Requests

Stacy some text needs to go here.

By Instrument: By Name:

1 Evidence Submission(s) found.

Instrument	Evidence Request	Doc Links	Required	Request Status	Response Status	Evidence Request
CE	Private School Affirmation	1	Y	Incomplete	Draft 07/16/2015 2:00AM FPM Agency (FPMAgency)	Certify

General CMT Questions: FPM Office | CMT@cde.ca.gov | 916-319-0935



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What's Different?

- Reviewer only see certified documents
- Documents linked to certified Evidence requests are considered final
- Agency cannot name documents with the same title—automatic version control



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What's Different?

- Agencies cannot edit or remove documents in which the reviewer has **“locked the link”**
- Documents in which the **“link is not locked”** will be purged based on CDE records retention guidelines

Comments



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Logged on as joeConsultan

ABC Unified (1964212000000)
[Logout](#)

Home
Reviews
Documents
Evidence Requests
Certify Evidence
Reports
Users

Evidence Request

AE: General Ledger

Description: Upload a detailed general ledger, accounting for the specific resource code(s) being reviewed. The general ledger should include the date, description, vendor name, and total amount for each expenditure line item.

Related Items: [AE 03](#)

New Document Link: Agency Select a Doc

EntityName	EntityCode	Document	File/Web address	Edit
Other Instruments with the same evidence request				
Click "Add Links" below next to each instrument, where you would like to automatically generate document links using the document links above. Note: where Agency or Site links may not be relevant, document links will not be added. See ... for more information.				
CE: Compensatory Education	Link	Y	CE 19	
CTE: Career Technical Education	Link	Y	CTE 05	
ITQ: Improving Teacher Quality	Link	Y	ITQ 03 ITQ 04	

Add a Comment

Regarding: CE Instrument

Add Comment

Comments
[View Thread](#)

For Walton Middle, parent nomination opportunities (in registration information letter and in e-mail to PTSA members) need to provide a concise description of SSC.
Mark Klinesteker
6/5/2015 3:04 PM

For Dominguez High, see CE Resources for additional documentation suggestions...
Mark Klinesteker
6/4/2014 3:04 PM

General CMT Questions: FPM Office | CMT@cde.ca.gov | 916-319-0935



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What's Different?

- Comments are posted at the Instrument or Item level not to a person
- Notification features are under development



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Resolution of Findings

- Evidence evaluation same as before and during review
- Resolution Agreement requests/approval/denial as previously described
- Reviewer changes due date in CMT



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Requesting a Resolution Agreement

- Requested via CMT comment
- Must describe activities that will occur and date when evidence will be uploaded
- Agreement cannot extend beyond 225 calendar days after last day of the review



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CAIS

- CAIS will remain open through SY 2015–16
- Open reviews will continue to use CAIS
- Document retention policy under development with the CDE Legal and Program Offices
- At some date in the future, documents will be purged from CAIS



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CMT Support

- COE Monitoring Leads support agencies in use of CMT
- RTLs support COE Monitoring Leads, Agency Review Coordinator, and CDE reviewers in use of CMT



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FPM Resources

CAIS County Leads

<http://www.cde.ca.gov/ta/cr/caisleads.asp>

Regional Team Leaders

<http://www.cde.ca.gov/ta/cr/rtlassignments.asp>

CDE Compliance Monitoring Web page

<http://www.cde.ca.gov/ta/cr/>

CDE CMT Web page

<http://www.cde.ca.gov/ta/cr/cmt.asp>

CDE CAIS Web page

<http://www.cde.ca.gov/ta/ac/ca/index.asp>