

## How to Submit a Local School Board Training Reimbursement Request

### How to Navigate the NEXSYS Application

**Part one of this guide focuses on Local School Board Reimbursement Training Submissions. Instructions are directed to users who already have MiLogin/NexSys rights. In the Informational section, users can find a direct link to the MiLogin/NexSys Website, which includes the application form to gain access to NexSys and general user guidance for the NexSys application.**

**Part 2: Provides instruction for Modifying returned applications.**

Please note that in order to submit the application in full, you must be a Level 5 Authorized Official. Level 4 users can enter the data and attachments. However, they cannot send the final submission. Level 4 users must notify the Level 5 user to submit the application once all the data has been entered.

### **Important Information**

- Board Reimbursements are submitted in the NexSys Application System.
- Courses approved by the Michigan Department of Education (MDE) and provided by the Michigan Association of School Boards (MASB) can be viewed at [Training Reimbursement \(masb.org\)](https://www.masb.org).
- NexSys will automatically flag errors, including reimbursement amounts that exceed \$100 and reimbursement requests that occurred prior to the effective date of the authorizing legislation (October 1, 2021). NexSys will also flag any request for training that has not yet occurred.
- This guide is predicated on the understanding the user is registered with MiLogin and has received access to NexSys.
- A general NexSys navigation guide can be found on the [NexSys website](#).
- To add a new NexSys user, please access the NexSys website linked above. Scroll down to the NexSys Security Access Form, click the link, and complete the form as directed.
- **Requests must be completed during the current Fiscal Year (FY)** for approval (October 1 to September 30).
  - **Only third-quarter requests will be reviewed for the new FY (July August, September) as time does not allow for them to be added to the August State Aid Payment.**
- **Final payments are based on funds available. This grant is an allotted amount of \$150,000 per FY. Once expended, requests, even if approved based on criteria, will be denied for no funds available.**
- **STATE FUNDS AVAILABLE:** with this particular grant, State Funds Available only re-opens the application to make amendments. The goal is one application per FY. This notifies our financial unit that it can be prepared for the next quarterly State Aid Payment. You do **NOT** need to request funds. This is an automatic payment, quarterly. NexSys is designed as a blanket application, so we cannot adjust the SFA term.

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- Requests MUST include completion documentation for support. (Transcript, completion emails from MASB/MASA, board meeting minutes) Invoices or registration alone are not acceptable.

### **Navigating the NexSys Dashboard**

- Using the “My Opportunities” box on the right side of the screen: Application)
  - Search for Local School Board Member Training Reimbursement
  - To open, click on the name of the application
  - Review the details of the pop-out box, and click proceed
  - The application is now in Progress

## How to Submit a Local School Board Training Reimbursement Request

### **NexSys Document Overview**

- Vertical Navigation Ribbon (Green, left side of the screen)
  - Click the title of each section and complete as appropriate
  - **Main Titles/Application Sections**
    - Forms
    - Budget Summary
    - Tools
    - Status Options
    - Related Documents
  - **Forms:**
    - Cover Page
      - Verify Entity, complete Main Contact and Secondary contact information as appropriate
      - Click the SAVE button at the top right of the screen
    - Assurances and Certifications
      - Review Assurances and click SAVE at the top right of the screen
    - Important Information
      - Requirements for Section 602 reimbursements
      - Application Help and guidance links, link to MDE website
      - Review this section and click SAVE at the top right of the screen
    - Review Grant Selections
      - Click Apply Now, then click SAVE button at the top right of the screen
      - Application (Budget Section) will open to complete
  - **Budget**
    - Budget Summary
      - Complete Contact Information. All (\*) areas are required
      - Click SAVE button at the top right of the screen

**Note:** This section cannot be saved until all Budget Items are completed. An error message will appear until finalized.

- Budget Items (example to follow description)
  - Funding Source
    - Boxes 1 through 3 are drop-down boxes-select appropriate option
    - Box 4: List the Name of the course completed
      - EX. CBA 101 or Superintendent Evaluation Training
    - Box 5: Add Date
    - Box 6: List the name of the Board Member (Specific Description)
    - Dollar Amount boxes: Enter Cost of Course under **Purchased Services.**

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- *Reminder: reimbursement allowable is **up to \$100 maximum per course, most courses are \$99. \$100 will only be approved for courses with a base rate of over \$100.***

Local School Board Member Training Reimbursement					
Program Number	Project Number	CFDA Number	Starting Date	Ending Date	Fiscal Year
245090	2025	CFDA Num	10/01/2024	09/30/2025	2025
Please select the approved area of training:					
Board Governance <input type="button" value="v"/>					
Please select the entity name providing course/training program:					
The Michigan Association of School Boards (MASB) <input type="button" value="v"/>					
Select the appropriate Function Code for this budget item:					
231: Board of Education <input type="button" value="v"/>					
Please enter the name of the course/training program:					
CBA 101: Fundamentals of School Board Service					
45 of 250					
Please select the date of course/training program completion:					
07/18/2024 <input type="button" value="v"/>					
Provide a specific description for this budget item. Do not repeat the Function Code description selected in the drop down menu or the heading(s) of the box(es) used below:					
Board Member Completed: Alexis Han					
34 of 250					

- Budget Detail
  - Review of information being requested
- Flagged Budget Items
  - Initial application: This section is empty/unfillable
  - Returned applications for Modifications
    - *Modification flags can be found here*
    - *Review modifications to correct requests and resubmit*
- **Attachments**
  - Upload support documentation here:
  - Title Format: Member Name.Version of Course Name
    - EX. BSmith.CBA101, or BSmith.SuperintendentEvaluation
    - You may also save all of one member files together, or do one pdf of all files in the order you enter the submissions
      - Click SAVE at the top right of the screen
      - Under TOOLS, click on "Document Validation"
    - You will see any errors that need to be corrected here
    - Once corrections are completed, go to **Status Options** section
  - Select Submit Application
  - *Note: As a reminder, you may view application status under Document Overview*
- **Approvals**
  - History:
    - View historical approvals

## How to Submit a Local School Board Training Reimbursement Request

- **Tools**
  - Landing Page
    - Shows the status of the application
  - Add/Edit People
    - Allows changes for additional staff to request/process reimbursement requests
  - Status History
  - Attachment Repository
    - View/Export files uploaded within the document
  - Document Status History
  - Modification History
    - View two versions of a request that requires modification
  - Document Validation
    - Pop-out box to review documents that are required to be completed and saved prior to being able to submit a request
  - Notes
    - Allows communication between the applicant and MDE. Both can converse back and forth in one easy to view thread
    - Applicant can add a new note by clicking the **New Note** button at the top right of the screen
  - Print Document
    - Print feature to print all pages of the request
  - Document Messages
- **Status Options**
  - Submit Application
  - Cancel Application

## How to Submit a Local School Board Training Reimbursement Request

### **Application Returned-Modifications are Required**

This section walks users through the application pages and guide them through making modifications when an application is returned.

From the Dashboard screen, applications in progress can be found two ways.

1. Using the My Task box in the center of the screen on the left (scroll to find the application)
2. Using the Searches drop-down menu located in the blue ribbon on the top left of the screen.
  - Recent Documents: allows a search by application number
  - Applications: opens the Application Search
    - In the Search Criteria box, use the My Application/Task drop-down menu to find Local School Board Member Training Reimbursement
    - Once selected, click on the dark blue search button to open the list of applications that are connected to the district
    - The list will be at the bottom of the page-select the proper application needed to modify, and open it by clicking on the application number

Once the application is open, go to the Status Options tab at the bottom of the left ribbon and follow the process below to resubmit the request.

#### Status Options

- Select Modifications in Progress
- Proceed to Flagged Budget Items to see which courses/line items are flagged for changes

#### Budget Items

- Unallowable Flag: Go to top right of the screen and click the Delete button
- Modifications Flag: Review the comment and update the request based on the comments. Click SAVE at the top right of the screen
- Approved: This line is completed and locked for edits. No review needed
- Return to the Budget Summary tab
- Review changes and click save again to make sure all the boxes in the ribbon are checked as complete
- If an exclamation point appears in any boxes, go to that section to review the error
- Once all errors are corrected, go to Status Options and click Modifications Submitted