



AUDIT FINDING CORRECTIVE ACTION 2023-2024

Lodi Unified School District - Includes Joe Serna Jr. Charter School
San Joaquin County, California

FINDING CATEGORY Attendance

FINDING # 1

PAGE: # 85

Describe below specific corrective action used in resolving audit finding:

Specifically address each individual item within the finding. Be certain that your responses are clear and concise. You will need to provide all documentation which supports the specific action taken toward resolving the finding; i.e., copies of amended reports, corrective action plans, etc.

Attach all pertinent documentation. Number of attachments for this finding: 2

To ensure proper documentation and compliance with Attendance Accounting and Reporting requirements, District staff provided one-on-one training to school site personnel on an ongoing basis. See Attachment #1. In addition, Attendance Manuals are available on the Lodi USD website to ensure school sites utilize the most updated manuals. An email reminder of the available resources was sent to all schools. See Attachment #2.



FW: Oakwood Attendance Training Recap

From Susan Lee (Accounting) <slee@lodiUSD.net>
Date Fri 2/21/2025 4:08 PM
To Dao Xiong (Accounting) <dxiong@lodiUSD.net>

FYI

Thank you,

Susan Lee

Lodi Unified School District
Accounting Department
Phone (209) 331-7141 | Jive# 801016



From: Susan Lee (Accounting)
Sent: Thursday, February 13, 2025 4:07 PM
To: Cassandra Sotelo (Oakwood Elementary) <csotelo@lodiUSD.net>; Nancy Erwin (Oakwood Elementary) <nerwin@lodiUSD.net>; Hector Madrigal (Oakwood Elementary) <hmadrigal@lodiUSD.net>
Subject: Oakwood Attendance Training Recap

Hi Cassandra,

Thank you for letting me train Hector and Nancy this morning.

Here's a recap from the Attendance training.

I went over the Attendance for Elementary Schools on what should be completed on a daily, weekly, and monthly basis step by step.

Resources Provided:

- Attendance for Elementary Schools procedure
- Statistical School Months for Attendance Accounting and Reporting School Year 2024-25
- Missing Attendance report
- Attendance Log report
- Attendance Audit Listing report
- Course Attendance Audit report
- Monthly Attendance report
- Monthly Attendance Summary report

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department
Phone (209) 331-7141 | Jive# 801016



FW: Ansel Adams Attendance recap

From Susan Lee (Accounting) <slee@lodiUSD.net>

Date Fri 2/21/2025 4:06 PM

To Dao Xiong (Accounting) <dxiong@lodiUSD.net>

FYI

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



From: Susan Lee (Accounting)

Sent: Friday, February 21, 2025 10:21 AM

To: Michael Coughlin (Ansel Adams Elementary) <mcoughlin@lodiUSD.net>; Gina Saccone (Ansel Adams Elementary) <gsaccone@lodiUSD.net>

Subject: Ansel Adams Attendance recap

Hi Michael,

Thank you for the opportunity to train Gina yesterday. The training went very well.

Here's a recap of the Attendance training:

- We reviewed the Attendance Manual for the Elementary School and discussed the daily, weekly, and monthly procedures.
- We reviewed the Schedule of Due Dates for each monthly report.

As a reminder, the Attendance Manual and the Schedule of Attendance Report Due Dates are updated yearly and posted on the Lodi USD website.

If Gina has any further questions, she can reach out to me.

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



FW: Creekside Attendance Training recap

From Susan Lee (Accounting) <slee@lodiUSD.net>

Date Fri 2/21/2025 4:06 PM

To Dao Xiong (Accounting) <dxiong@lodiUSD.net>

FYI

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



From: Susan Lee (Accounting)

Sent: Friday, February 21, 2025 10:21 AM

To: Brian Heck (Creekside Elementary) <bheck@lodiUSD.net>; Vanessa Saavedra (Creekside Elementary) <vsaaavedra@lodiUSD.net>

Subject: Creekside Attendance Training recap

Hi Brian,

Thank you for the opportunity to train Vanessa yesterday. The training went very well.

Here's a recap of the Attendance training:

- We reviewed the Attendance Manual for the Elementary School and discussed the daily, weekly, and monthly procedures.
- We reviewed the Schedule of Due Dates for each monthly report.

As a reminder, the Attendance Manual and the Schedule of Attendance Report Due Dates are updated yearly and posted on the Lodi USD website.

If Vanessa has any further questions, she can reach out to me.

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



FW: Millswood Attendance Training recap

From Susan Lee (Accounting) <slee@lodiUSD.net>

Date Fri 2/21/2025 4:06 PM

To Dao Xiong (Accounting) <dxiong@lodiUSD.net>

FYI

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



From: Susan Lee (Accounting)

Sent: Friday, February 21, 2025 10:21 AM

To: Erin Lenzi (Millswood Middle) <elenzi@lodiUSD.net>; Selena Wardrip (Millswood Middle) <swardrip@lodiUSD.net>; Precillia Lopez De Santiago (Millswood Middle) <pdesantiago@lodiUSD.net>

Subject: Millswood Attendance Training recap

Hi Erin,

Thank you for the opportunity to train Selena yesterday and Precillia last week (2/10/25). Both trainings went very well.

Here's a recap of the Attendance trainings:

- We reviewed the Attendance Manual for the Secondary School and discussed the daily, weekly, and monthly procedures.
- We reviewed the Schedule of Due Dates for each monthly report.

As a reminder, the Attendance Manual and the Schedule of Attendance Report Due Dates are updated yearly and posted on the Lodi USD website.

If Selena or Precillia have any further questions, they can contact me.

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



FW: McNair Attendance Training Recap

From Susan Lee (Accounting) <slee@lodiUSD.net>

Date Fri 2/21/2025 1:52 PM

To Dao Xiong (Accounting) <dxiong@lodiUSD.net>

FYI

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



From: Susan Lee (Accounting)

Sent: Thursday, February 13, 2025 3:49 PM

To: Nicole Vertar (Ronald E McNair High) <nvertar@lodiUSD.net>; Brenda Rapert (Ronald E McNair High) <brapert@lodiUSD.net>

Subject: McNair Attendance Training Recap

Hi Nicole,

Thank you for letting me train Brenda yesterday afternoon.

Here's a recap from the Attendance training.

I went over the Attendance for Secondary Schools on what should be completed on a daily, weekly, and monthly basis step by step.

Resources Provided:

- Attendance for Secondary Schools procedure
- Statistical School Months for Attendance Accounting and Reporting School Year 2024-25
- Missing Attendance report
- Period Absence Audit report
- Single Period Attendance Validation Form
- Mass Change All Day Code
- Attendance Log report
- Attendance Audit Listing report
- Course Attendance Audit report
- Monthly Attendance report
- Monthly Attendance Summary report

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016





Attendance

From Susan Lee (Accounting) <slee@lodiUSD.net>

Date Wed 2/5/2025 6:14 PM

To Gina Saccone (Ansel Adams Elementary) <gsaccone@lodiUSD.net>; Monse Bertolozzi (Beckman Elementary) <mbertolozzi@lodiUSD.net>; Teresa Souza (Lois E Borchardt Elementary) <tsouza@lodiUSD.net>; Martina Hernandez (Clairmont Elementary) <marhernandez@lodiUSD.net>; Vanessa Saavedra (Creekside Elementary) <vsaavedra@lodiUSD.net>; Silvia Babcock (Davis Elementary) <sbabcock@lodiUSD.net>; Klaire Green (Elkhorn) <kgreen@lodiUSD.net>; Alicia Gaytan (Heritage Elementary) <agaytan@lodiUSD.net>; Melissa Fugazi (Lakewood Elementary) <mfugazi@lodiUSD.net>; Tricia Munoz (Ellerth E Larson Elementary) <trmunoz@lodiUSD.net>; Judith Villagran (Lawrence Elementary) <jvillagran@lodiUSD.net>; Lisa Lambaren-Perez (Live Oak Elementary) <lperez@lodiUSD.net>; Sierra Marion (Lockeford K-8) <smarion@lodiUSD.net>; Joyce Kite (Julia Morgan Elementary) <jkite@lodiUSD.net>; Angelina Nguyen (George L Mosher Elementary) <annguyen@lodiUSD.net>; Paulatane Pe (John Muir Elementary) <ppe@lodiUSD.net>; Rosanna Ramirez (Clyde W Needham Elementary) <rramirez@lodiUSD.net>; Maricela Santana (Morada Middle) <msantana@lodiUSD.net>; Nancy Erwin (Oakwood Elementary) <nerwin@lodiUSD.net>; Bobbi Dorado (Parklane Elementary) <bdorado@lodiUSD.net>

Cc Michael Coughlin (Ansel Adams Elementary) <mcoughlin@lodiUSD.net>; Gina Azevedo (Beckman Elementary) <gazevedo@lodiUSD.net>; Brianna Carroll (Lois E Borchardt Elementary) <bcarroll@lodiUSD.net>; Shaunte Shorter (Clairmont Elementary) <sshorter@lodiUSD.net>; Brian Heck (Creekside Elementary) <bheck@lodiUSD.net>; Magenda Cruz (Davis Elementary) <macruz@lodiUSD.net>; Matthew Huiras (Elkhorn) <mhuiras@lodiUSD.net>; Jamie Moso (Heritage Elementary) <jmoso@lodiUSD.net>; Katie Gresham (Lakewood Elementary) <kgresham@lodiUSD.net>; Sarah Santana (Ellerth E Larson Elementary) <ssantana@lodiUSD.net>; Christine Alberg (Lawrence Elementary) <calberg@lodiUSD.net>; Tonia Arevalo (Live Oak Elementary) <tarevalo@lodiUSD.net>; Michael Rogers (Lockeford K-8) <mirogers@lodiUSD.net>; Jeff Pappas (Julia Morgan Elementary) <jpappas@lodiUSD.net>; Allison Inman (George L Mosher Elementary) <ainman@lodiUSD.net>; Michelle Brown (John Muir Elementary) <mbrown@lodiUSD.net>; Sonja Renhult (Clyde W Needham Elementary) <srenhult@lodiUSD.net>; Lindsay Wudel-Streeter (Leroy Nichols Elementary) <lstreeter@lodiUSD.net>; Cassandra Sotelo (Oakwood Elementary) <csotelo@lodiUSD.net>; Jennifer Huiras (Parklane Elementary) <jhuiras@lodiUSD.net>

Hi,

A recent audit finding stressed the importance of maintaining accurate and adequate records to support student attendance. Please ensure you follow the district attendance manuals when recording student attendance. These manuals are available on the Lodi USD website. The link is provided [here](#).

In addition, a friendly reminder that one-on-one training is available to school site personnel who handle student attendance. This training allows site staff to be familiar with the daily/weekly/monthly responsibilities described in the attendance manuals. Don't hesitate to contact the Accounting/Fiscal Reporting staff (Susan Lee) to schedule a time.

Thank you,

Susan Lee

Lodi Unified School District

Accounting Department

Phone (209) 331-7141 | Jive# 801016



AUDIT FINDING CORRECTIVE ACTION 2023-2024

Lodi Unified School District - Includes Joe Serna Jr. Charter School
San Joaquin County, California

FINDING CATEGORY State Compliance - After School Education Safety Program

FINDING # 2

PAGE: # 86

Describe below specific corrective action used in resolving audit finding:

Specifically address each individual item within the finding. Be certain that your responses are clear and concise. You will need to provide all documentation which supports the specific action taken toward resolving the finding; i.e., copies of amended reports, corrective action plans, etc.

Attach all pertinent documentation. Number of attachments for this finding: 2

To ensure that the ASES program maintains adequate and accurate attendance records, trainings have been provided to site leaders and staff. See Attachment #1. In addition, District Office staff have implemented a secondary review process of the attendance records kept at the schools. See Attachment #2.



Lodi Unified School District

Bridge Program Site – Lead Meeting

January 7, 2025

NOTES:

★ **Supervisor Activity**

★ **Continuous Quality Improvement: (CQI)**

- Expanded Learning: [Quality Standards](#):
 - Program Level
 - Staff Level
 - Participant Level
- [Self-Assessment](#): Site-Leaders **[completed]**
- [Staff Survey](#):
- [Student Survey](#):
- Due Date: January 21, 2025

★ **Classroom Request**

- Purpose
- Guidelines

★ **Attendance Reviews: *New***

- Purpose: Increase accuracy
- When: Monthly Attendance Mtgs: (1st Friday - Every Month) Starting Feb. 2025
- How: Supervisor lead reviews:

★ **Updates & Reminders:**

- **100% ADA** Capacity = 84+ Elem. / 110+ Middle Sch
- **ALL STAFF PD** (*Early Dismissal Days*):
 - Jan. 15: Table & City of Lodi
 - Jan. 22: Elevo & YMCA
- Mid Year Parent Survey/Principal Survey
- Next Rems Drill: 1/24/25 , **Action Secure Building**
- Daily Schedule: Submit 1st of each month (*VP's & Sup's*)
- Timecards: Para/Teacher attendance sheet due at the end of each month

Next Meeting - CQI Team Mtg. with Supervisor: 1/21/25 (Locations will vary)



Event **Scheduling Assistant**

🗑️ ↩️ ⏪ 📱 ✓ Accepted 📅 ⏰ Busy 15 minutes before 🏷️ Categorize 🗑️ Scheduling poll ⚙️ ...



January Auditing Clips

🕒 Tue 2/4/2025 10:00 AM - 12:40 PM

📍 Portable A

We will be auditing your January clips in Portable A on a one-on-one basis. Please be prompt as we have 20 min each to get through clips. No need to bring your laptops as I will have my surface pro in case we need to make changes 😊

Stockton
10:00- Ansel
10:20- Mosher
10:40- Clairmont
11:00- Westwood

Lodi
11:20-Lodi Middle
11:40- Larson
12:00- Borchardt
12:20- Beckman

Meeting Insights

Here's information you might find relevant to this event. Other attendees will only see content they have access to.

Files

Sara Wilburn (Intervention & Su... Sent at 1/30/2025	Sara Wilburn (Intervention & Su... Sent at 1/30/2025	Sara Wilburn (Intervention & Su... Sent at 1/31/2025
Bridge Substitute Recap (1).pdf Fw: Site Recaps	Bridge Substitute Recap (2).pdf Fw: Site Recaps	GRASP-IT Trainings 2024-25 (1).pdf Fw: PD Opportunity!
Melissa Hackman (Educational S... Sent at 11/21/2024		
Bridge Substitute Recap (1) (1).pdf Site Recaps		
1 more ▾		
Sara Wilburn (Intervention & Su... Sent at 1/31/2025	Sara Wilburn (Intervention & Su... Sent at 1/30/2025	Yesenia Orta (Intervention & Sup... Sent at 1/28/2025

Tracking

Organizer

Sara Wilburn (Intervention...
Sent on Thursday, 1/30/2025 at 12:44 PM

Attendees

You responded "Accept"

▾ Accepted: 8

- HH Helen Hernandez (Interven...
Required
- VJ Victoria Johnson (Intervent...
Required
- DJ Dupree James (Interventio...
Required
- HW Heather Weigum (Interven...
Required
- AK Aliahya Ket (Lodi USD)
Required
- Yesenia Orta (Intervention ...
Required
- JG Jasmine Garcia (Lodi USD)
Required
- MH Melissa Hackman (Educati...
Required

▾ Didn't respond: 2

- MI Mayra Iniguez (Interventio...
Required
- RC Ravin Cervantes (Interventi...
Required

Attendance Go Back Form

This form stays with the attendance clip and is due back with the clip for resubmission

Site Name: _____

Date Returned to Site Lead: _____

Date Due: _____

Reason for return:

- € Missing Codes _____
- € Missing Parent Signatures/times _____
- € Missing Staff Signature(s) _____
- € Missing EZ Report cover/yellow highlighting of absences _____
- € EZ Report errors _____
- € Numbers do not match _____
- € Other: _____

Date Resubmitted: _____

Ready to File Signature: _____ Date: _____