

# 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

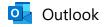
**PAGE:** # 85

#### 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 <u>all</u> 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: \_\_\_\_

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.

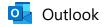
Here's a recap from the Attendance training.

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.

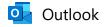
As a reminder, the Attendance Manual and the Schedule of Attendance Report Due Dates are updated yearly and posted on the Lodi USD website.

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

Thank you,

#### Susan Lee





#### 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)
<vsaavedra@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.

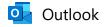
As a reminder, the Attendance Manual and the Schedule of Attendance Report Due Dates are updated yearly and posted on the Lodi USD website.

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

Thank you,

Susan Lee





#### 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.

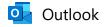
As a reminder, the Attendance Manual and the Schedule of Attendance Report Due Dates are updated yearly and posted on the Lodi USD website.

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

Thank you,

Susan Lee





#### 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:** 

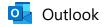
- Attendance for Secondary Schools procedure
- Statistical School Months for Attendance Accounting and Reporting School Year 2024-25
- Missing Attendance report
- Period Absence Audit report
- Single Period Attendance Validation Form
- Mass Change All Day Code
- Attendance Log report
- Attendance Audit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

Thank you,









#### 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) <lprez@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>; Paulatanee 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) <br/><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) <caberg@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) <a href="mailto:aimman@lodiusd.net">aimman@lodiusd.net</a>; Michelle Brown (John Muir Elementary) <mbr/><mbr/>srenhult@lodiusd.net>; Lindsay Wudel-Streeter (Leroy Nichols Elementary) </a>

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 <u>here</u>.

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 <u>all</u> 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:

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.





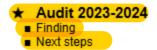
## **Lodi Unified School District**

### Bridge Program Site – Lead Meeting

December 10, 2024

NOTES:

#### ★ Fall Conference



#### ★ QSA

Next Steps

#### ★ Updates & Reminders:

- 100% ADA Capacity = 84 Elem. / 110 Middle Sch
- Mid Year Parent Survey
- Next Rems Drill: 1/24/25 , Action Secure Building
- Daily Schedule: Submit 1<sup>st</sup> of each month (VP's & Sup's)
- Timecards: Para/Teacher attendance sheet due at the end of each month

Next Site-Lead Meeting: 1/7/25



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## Lodi Unified School District

### Bridge Program Site – Lead Meeting

January 7, 2025

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

#### ★ Updates & Reminders:

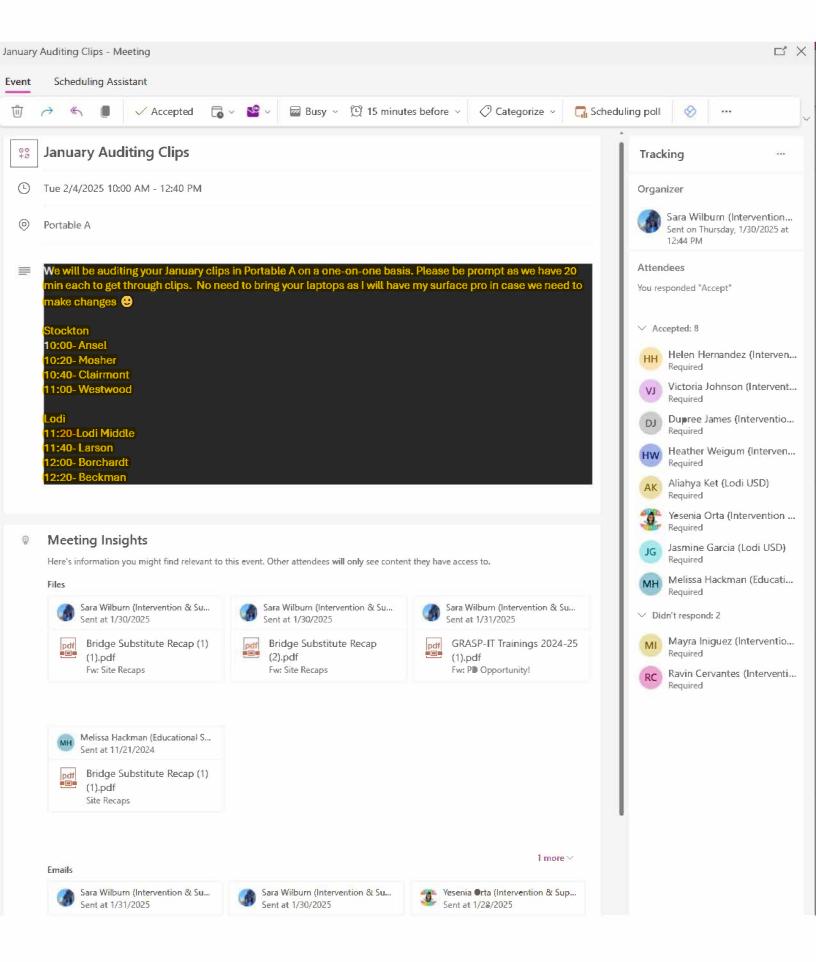
Purpose

- 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 1<sup>st</sup> 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)

NOTES:

### Attachment #2



### **Attendance Go Back Form**

	*This form stays with the attendance clip and is due	e back with the clip for resubmission*
Site Name:		
Date Returned to Site Lead:		
Date Due:		
Reason	n 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:	and the state of the second
Date Resubmitted:		
Ready to File Signature:		_ Date: