



# Y7 Pooling: Process, Form & Instructions

Office of Religious & Independent School Support (ORISS)

## ACADEMIC INTERVENTION SERVICES (AIS)

### Pooling Eligibility

#### What is Pooling?

Pooling of funds is used when legally related entities have collaborative items/services and wish to combine their allocations. Pooling is optional and most schools do not participate in pooling.

#### Who can Pool?

Only eligible schools may elect to pool. Pooled funding is limited to those schools who share a Payee address. Information on how to access and/edit an institution's Payee Names/Addresses can be found in the Y7 AIS Application Instructions. An institution who's already submitted an application for the Y7 AIS claim cycle would not be eligible to pool.

#### Pooling Eligibility Checklist

Eligibility requires all the following:


- Confirm **each** of the affiliated pooling schools have a Y7 AIS Allocation.
- Confirm **all** of the affiliated pooling schools share a Payee Name/Address.
- Confirm **none** of the affiliated pooling schools previously submitted an application for the Y7 AIS claim cycle.

### AIS Portal Instructions


1. Complete a Y7 AIS Application.

- **Each** pooling institution must complete a separate AIS claim application.
  - If there are 2 institutions who are electing to pool, the AIS office must receive 2, separate claim applications at the same time.
- In the Pooling Section of the application **each** pooling applicant must:
  - Select "Yes" to the pooling option and complete the remainder of fields in this section. If an institution fails to indicate pooling on their claim application, it could result in a Y7 AIS claim review and subsequent reimbursement (i.e., an individual claim). This filer would no longer meet the eligibility requirements for pooling.
  - Upload one, identical completed Y7 AIS Pooling Form (found below). The Y7 AIS Pooling Form uploaded for each pooling applicant must match to proceed with the claim review. Discrepancies in institutional Y7 AIS Pooling Forms will likely result in processing delays.

Pooling Options (Collaborating Agencies)

Select to pool funds with my related agency/school/entity for this grant cycle.  Yes  No 

No file chosen



Name of Lead Entity:	
Pooling School Name:	
Pooling School Beds Code:	
Pooling School SEDREF Payee (both entities MUST have the same SEDREF Payee in order to pool):	
Pooling School Contact Name:	
Pooling School Contact Phone:	
Pooling School Contact E-Mail:	

## Pooling Form Instructions

### 1. Verify Payee Information

- Confirm the Payee Information is the same for **each Institution ID** participating in the pooling application.
- Information on how to access and/edit an institution's Payee Names/Addresses can be found in the Y7 AIS Application Instructions

### 2. Complete the **Pooling Institutions Chart**

- Open Y7 AIS School Allocations. This can be found on the [AIS Guidance & Resource Documents webpage](#).
- Locate and record the allocations for **each Institution ID**.
- The example below references two pooling schools. However, if needed, insert additional rows to accommodate your pooling size on the included Pooling form.

School_Name	INST_ID	Y1-6_Rollover	Y7_Allocation	Allocation Balance
Great Elementary School	800000012345	\$ 0	\$ 5,385	\$ 5,385
Great Middle School	800000067890	\$ 0	\$ 1,030	\$ 1,030

### 3. Complete the **Pooling Allocation Usage Chart**

- A pooled funding agreement allows institutions to share a combined, collective allocation.
- However, pooled institutions need to identify which of the combined, collective allocations are utilized at which site.
- Pooling schools must complete the Pooling Allocation Usage Chart.
- Please note that the Pooling Allocation Usage Chart is a summary. The full invoice and payment details will be submitted by each school within their Y7 AIS Application.

Example:

- Great Elementary School has \$5,385 in total available funds.
- Great Middle School has \$1,030 in total available funds.
- Great Schools spent \$6,000 on a math workshop for teachers in grades 3-8, so teachers from both locations attended and these locations share the same payee information.
- Great Schools is pooling and electing to claim \$5,385 under the Elementary BEDS code and the remaining \$615 in workshop fees using the Middle School BEDS code.
- The Elementary school will have utilized the full allocation balance. The Middle school will have a remaining allocation of \$415.00 to rollover to the following year.
- A sample of Great Schools Pooling Allocation Usage Chart is included below.

Shared Payee Info	Pooling School Name	Allocation Balance	Purchase & Cost	Amount Paid	Remaining Allocation
<b>GREAT SCHOOL</b>	Great ES	\$5,385	Workshop fees \$6000	\$5385	\$0
	Great MS	\$1,030	Remaining fees \$615	\$615	\$415



## Authorization

Electing to pool is a shared commitment (pooling is optional). Each participating school must complete an authorization box below.

<b><u>Pooling/Collaborating Agency</u></b>		
<input type="checkbox"/> (check and complete this section only if applicable to your school) <i>I hereby certify that the school listed is authorized to pool AIS funds with a consortium, a diocese, or other provider. Please list the information requested below.</i>		
Name of Lead Entity _____		BEDS Code (if applicable) _____
Contact Name _____	Contact Phone # _____	Contact Email _____

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