Interim Helpful Hints

Helpful Hint #1 – Interim SACS information
October 29, 2026

This Week's Focus: Prepare your First Interim extract and be ready to import once the 2026-27 First Interim SACS Web System is available.

Before You Import

• Use CompassEdu → EduReports 3.0 → SACS Extract – Interim.
• For First Interim, use the reporting period 07/01/2026–10/31/2026.
• Do not change the extract dates to pick up later budget activity; subsequent approved budget transfers will flow to the Projected column on later extracts.
• Save the extract file without changing the file type before importing it into SACS.

SACS Help & Training

Use the SACS Web System help/search features and current CDE training resources if you need assistance navigating forms or the import process.

Additional Resource: Refer to the 2026-27 First Interim Reporting presentation, slides 8–22. The Interim Report Submission Bulletin also provides step-by-step extract guidance.

Helpful Hint #1B – SACS web system is now available

SACS WEB SYSTEM 2026–27 INTERIM REPORTING

The 2026-27 First Interim, Second Interim, and End of Year Projection financial reporting functionality is now available in the California Department of Education (CDE) Standardized Account Code Structure (SACS) Web-based Financial Reporting System (SACS Web System) at https://sacs-cde.org/security/login.

KNOWN ISSUES AND WORKAROUNDS

There are no known issues at the time of this email. Any new SACS Web System known issues and available workarounds will be posted in the Problems and Fixes section of News and Announcements, available on the user’s dashboard upon logging into the system. Users should refer to this information prior to seeking assistance with SACS Web System issues.

RELEASE UPDATES

Issues resolved since the last SACS Web System release will be posted to the “Web Application Release Updates” section of the CDE Financial Reporting web page at https://www.cde.ca.gov/fg/sf/fr/ in the near future.

If you need assistance with anything related to Interim Reports, please contact your Business Services Advisor

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SYSTEM VERSION UPDATE

The SACS Web System was updated to version 17 for the 2026–27 interim reporting periods. Any users who are still working on 2025–26 unaudited actuals datasets may receive a VERSION-CHECK technical review check (TRC) exception due to this system version update. To clear this TRC exception, users must provide an explanation or open and save all listed forms identified by this TRC, then re-run all the TRCs for both data types.

ACCESSING THE 2026–27 INTERM REPORTING PERIODS

Upon logging into the SACS Web System, users will set their context fiscal year to 2026–27 to access the 2026–27interim reporting periods. The context fiscal year can be changed via the Fiscal Year drop down menu which is located in the top right corner of the dashboard, below the user's profile information.

INTERIM REPORTING RESOURCES

Online help: There is online help available throughout the SACS Web System reporting screens by clicking on the help icon (question mark) located next to a screen heading.

User guide: The online version of the SACS Web System User Guide is available throughout the SACS Web System reporting screens by clicking on the help (question mark) icon located next to a screen heading. The CDE has also published a Word version of the user guide, available on the CDE Financial Reporting web page at https://www.cde.ca.gov/fg/sf/fr/ under "Web Application Resources." In addition, changes to forms and other processes for the 2026–27 interim reporting period are also available under "Web Application Resources".

Financial reporting calendars: The Financial Reporting and Fiscal Oversight Calendars are available on the CDE Financial Reporting web page at https://www.cde.ca.gov/fg/sf/fr/ under "Financial Reporting Resources."

SACS validation tables: The 2026–27 SACS Web System interim release contains the most current validation tables, dated October 16, 2026, released October 27, 2026, which are the same as those posted to the CDE SACS Valid Codes and Combinations web page at https://www.cde.ca.gov/fg/ac/ac/validcodes.asp.

To receive an email notification each time the validation tables are updated, please send a blank email message to join-sacs-update@mlist.cde.ca.gov.

CHARTER SCHOOL INTERIM PERIOD REPORTING

Only charter schools that use SACS forms will be able to utilize the SACS Web System interim financial reporting functionality. There is no charter school alternative form available in the SACS Web System for the 2026–27 interim reporting periods. Charter schools should discuss with their authorizing agency the format to be used to submit interim financial reports.

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TIPS FOR GETTING AN OFFICIAL STATUS DATASET

As the LEAs complete the 2026–27 Interim reports, the CDE encourages system users to follow these troubleshooting steps to get an official status dataset:

Follow the data processing sequence to ensure forms are opened and saved in the correct order. The data processing sequence is available in the online SACS User Guide here: https://docs.sacs-cde.org/2026-27/News/Procedures/#reporting-requirementsdue-dates. Users should click on "Interims" to access the applicable data processing sequence.
Run the technical review checks (TRCs) for all the data types. For 2026–27 interims, this includes original budget, board approved operating budget, actuals to date, and projected totals data types.
Ensure all required explanations are entered for Warning TRC exceptions for all applicable data types. You must enter a text explanation. Do not enter a blank space.

If you have questions regarding the SACS Web System, please contact the CDE by email at sacsweb@cde.ca.gov.

SACS DATA VIEWER PUBLISHING

REMINDER: Once the 2026–27 Interims dataset submissions are finalized, county office of education users should use the appropriate queues to promote the dataset submissions to the final state of “LEA Oversight Review Completed.” This ensures the dataset submissions are ready for publishing to the SACS Data Viewer.

If you have questions regarding the SACS Web System, please contact the CDE by email at sacsweb@cde.ca.gov.

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