

Instructions for using the School Planning and Reporting Application

The picture below shows the different areas of the application

1 – Submitting your documents

This is where you submit your documents to the Ministry. You can submit a strategic plan or annual report, or you can request the Ministry publish your annual implementation plan online (for those schools that do not have their own websites).

Note: Your annual implementation plan does not need to be submitted to the Ministry if you do not need the Ministry to publish online for you.

2 – Active

These are all the active records for documents you have submitted and their status. The different status options are:

- Draft – You have started a new record but have not submitted it yet
- Submitted – You have submitted a record to the Ministry
- Queried Back – You have submitted a record to the Ministry, and Ministry staff have sent the record back to you because there is something that needs your attention (for example, if there is something missing).
- MOE Ready to Publish – You have submitted a record to the Ministry and requested that your document is published on Education Counts because you do not have your own school website. The Ministry is in the process of publishing your document on Education Counts.

3 – Completed

These are all the records you have submitted to the Ministry that are complete. You have submitted all the required components for the record and your document is published online.

School Planning and Reporting

Document	Action	Deadline
Strategic Plans	Submit to the Ministry and publish on your school's website	By 1 March (every three years)
Annual Implementation Plans	Publish on your school's website, or use the form below for the Ministry to publish on your behalf	By 31 March (every year)
Annual Reports	Submit to the Ministry and publish on your school's website as soon as practicable	By 31 May (every year)

School Planning and Reporting for [School] School

Submit Strategic Plan 1

Request to Publish Annual Implementation Plan 1

Submit Annual Report

ACTIVE RECORDS

Checklist Name	Record Type	Year	Status
CHECK-00088907	Annual Report	2023	Queried Back 2
CHECK-00088908	Annual Implementation Plan	2024	Submitted
CHECK-00088909	Strategic Plan	2026 - 2028	Draft

[View All](#)

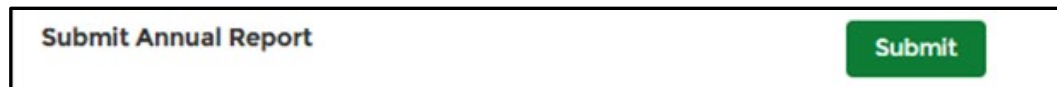
COMPLETED RECORDS

Checklist Name	Item Type	Year	Status
CHECK-00088906	Strategic Plan	2024 - 2025	Complete 3

Completing a record and uploading files

The below diagrams show how to submit a document, using the annual report as an example.

1. Select 'Submit Annual Report'

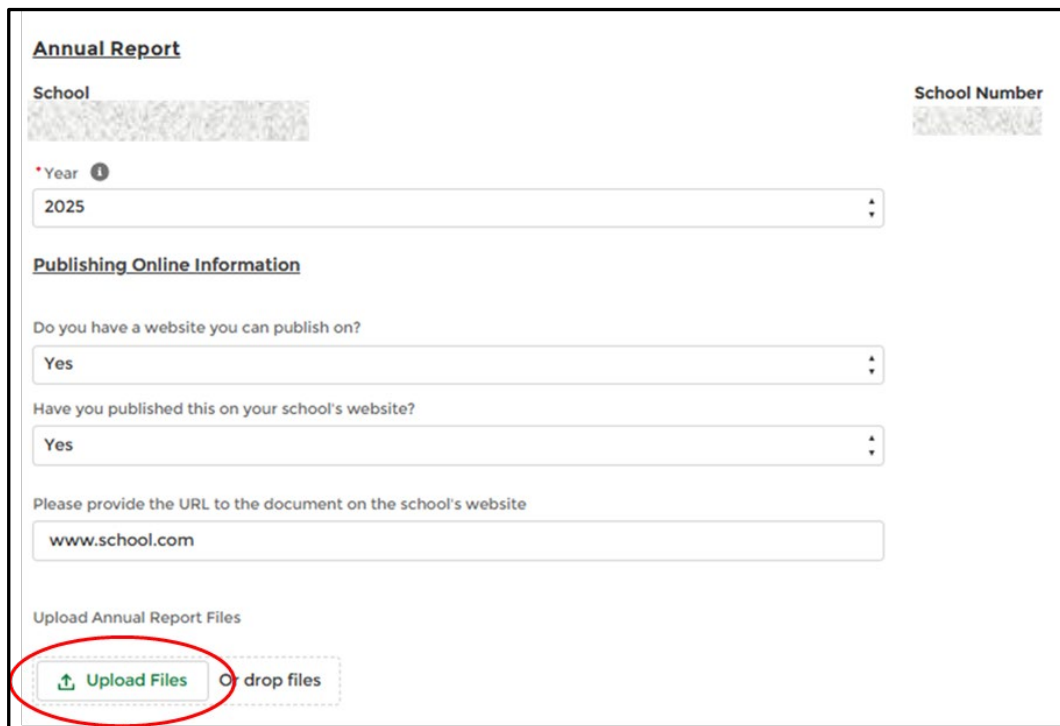
A rectangular button with a black border. On the left, the text "Submit Annual Report" is displayed in a dark grey font. On the right, there is a green button with the word "Submit" in white text.

An annual report record will appear. Your school name and school number will populate automatically.

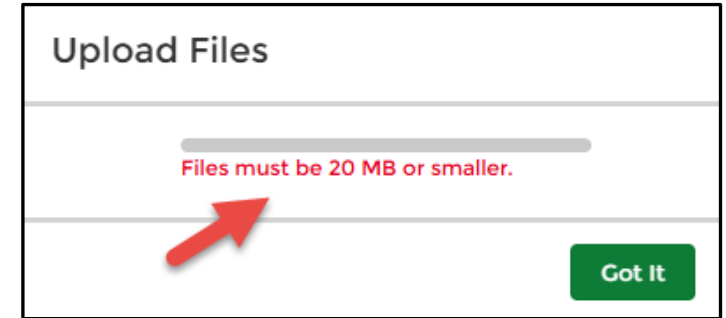
2. Select the year of the document you are submitting. For a 2025 annual report due 31 May 2026, this will be '2025'.
3. Answer the questions about whether the document has been published on your school website.

Note: If you do not have a school website, you will have the option of requesting the Ministry publish your document on Education Counts on your behalf. You will need to provide confirmation that your Board has reviewed any privacy concerns and approves the document for publication on the MoE website.

4. Upload your documents using the 'Upload Files' button.

A screenshot of a web form titled "Annual Report". The form contains several fields: "School" and "School Number" (both with blurred text), a "Year" dropdown menu set to "2025", a "Publishing Online Information" section with two "Yes" dropdown menus, and a text field for the URL "www.school.com". At the bottom, there is a section "Upload Annual Report Files" with a button labeled "Upload Files" (circled in red) and a dashed box labeled "Or drop files".

Note: You can upload **individual** files to 20mb size. If your document is bigger than 20mb, you can split the file and upload multiple smaller files. You will receive a warning if any individual file is too big.



5. After you have uploaded your files, select 'Next'

Note: If the 'Next' button is not showing, please check you have answered all of the questions on the record. If you are not ready to submit to the Ministry just yet, you can choose 'Save as Draft'. You can come back to complete this record later.



- 6. When completing an annual report record, you will be asked to record which components of the annual report you are submitting at this time.

Please confirm which components of the Annual Report are included in your attachment(s).

- Statement of Variance
- Statement of Compliance with Employment Policy
- Evaluation and Analysis Report
- Audited Financial Statements
- Independent Auditor's Report
- Statement of Kiwisport Funding

If applicable to your school also include this component

- Special and Contestable Funding

- 7. When you have finished making your selection, select 'Submit' to send your record (including your uploaded document) to the Ministry.

[Previous](#) [Submit](#)

- 8. When your record has been submitted successfully, you will see a confirmation message. This record will now show with a status of 'Submitted' under the list of your 'Active Records' .

School Planning and Reporting
Action
Submit to the Ministry and publish on your school's website
Publish on your school's website, or use the form below for the Ministry to publish on your behalf
Submit to the Ministry and publish on your school's website as soon as practicable
Thank you, we have received your Annual Report.

Submitting a record currently showing as 'Draft'

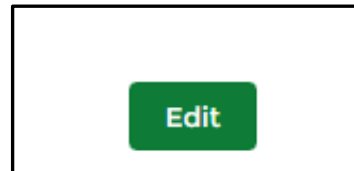
Follow the steps below if you saved a record as a 'Draft' (as part of Step 5 in the section: **Completing a record and uploading files**) and are now ready to submit the record to the Ministry.

Note: These steps use the Annual Report record as an example

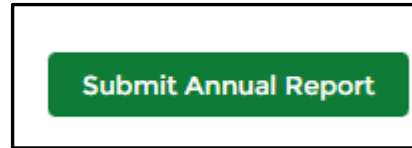
1. From the main School Planning and Reporting page, find the record you want to submit under the 'Active Records' section.
2. Select the relevant checklist link (this is the text in blue) under the 'Checklist Name' column.

ACTIVE RECORDS	
Checklist Name	Record Type
CHECK-00088907	Annual Report

3. Select the 'Edit' button in the bottom right-hand corner of the record.



4. Upload any documents you want to submit but have not yet added to the record.
5. Select the 'Submit Annual Report' button in the bottom right-hand corner.



6. When completing an annual report record, you will be asked to record which components of the annual report you are submitting at this time.
7. When you have finished making your selection, select 'Submit' to send your record (including your uploaded document/s) to the Ministry.
8. When your record has been submitted successfully, you will see a confirmation message. This record will now show with a status of 'Submitted' under the list of your 'Active Records'.

Error messages

1. If you attempt to create the same type of record for the same year you will see this error message. Please select the 'Previous' button. This will take you back to the record so you can adjust the year.

If you are wanting to amend (or add files to) a record you have already created, you can do this from the Document List.

An Annual Report has been created for this year. Select 'Previous' to change the year.

Previous

Cancel

2. If you forget to attach a file before submitting the record to the Ministry you will see this error message. Please select the 'Previous' button. This will take you back to the record so you can upload your files and continue with the submission process. If you are not ready to submit the record to the Ministry yet, you can select 'Save as Draft'.

The Record being Submitted has no attached files. Use the 'Previous' button to correct this.

Previous

Cancel

Responding to a record that has been 'Queried Back'

The Ministry may 'Query Back' a record to you that needs your attention. For example, you have forgotten to submit a required component of your annual report. Below are the steps you need to take if you have a record that is 'Queried Back' to you.

1. Select the record with the 'Queried Back' status.

ACTIVE RECORDS			
Checklist Name	Record Type	Year	Status
CHECK-00088907	Annual Report	2023	Queried Back

2. Read the Ministry Comments and amend record as appropriate. If you need to upload an additional file you can do this now.

Annual Report 2023

▼ Report Details

School	Year
XXXXXXXXXX	2023
School Number	Assigned To
XXXXXXXXXX	XXXXXXXXXX

Status
Queried Back

▼ Comments

Ministry Comments
Thanks for submitting your annual report. I cannot locate your Statement of Variance which is a required component of your annual report. Can you please upload a copy to this record. Thank you, Ministry of Education.

School Comment

Resubmit

Files (1)

XXXXXXXXXX
3/04/2025 - 12KB - docx

[View All](#)

3. Optional: Record a comment in the 'School Comment' section. This will be visible to Ministry of Education staff.
4. Select 'Resubmit'



Adding documents after submission

You can upload documents after submission to any record.

1. Select the record you wish to add a document to.

ACTIVE RECORDS			
Checklist Name	Record Type	Year	Status
CHECK-00088909			
CHECK-00088910	Annual Report	2024	Submitted
CHECK-00088908			
CHECK-00088907			

2. Select the arrow and then 'Add Files'.

Checklist
CHECK-00088910

[Return to Document List](#)

[+ Follow](#)

Annual Report 2024

Report Details

School	Year
	2024
School Number	Assigned To
Status	
Submitted	

Files (1)

Test 1
4/04/2025 • 13KB • docx

[View All](#)

[Add Files](#)

3. Select the file you want to upload and select 'Done' when it has finished uploading. The new file will now be uploaded to the record.

