

Career and Technical Student Organization (CTSO) Affiliate and Institutional Memberships

Instructions for Perkins Reimbursement Eligible Invoices (Claims)

Iowa permits the use of Perkins funding for expenses incurred by CTSO chapters that choose to affiliate their entire Career and Technical Education (CTE) program as members of a CTSO. To be eligible for Perkins funds, the entire enrollment of the CTE program (across all educators and semesters) must be entered into the corresponding CTSO, not just those students who express an interest.

Note the following **Perkins ineligible** conditions:

- Individual student membership costs; and,
- Individual instructor and/or advisor professional membership costs.
- Invoices with student, instructor, and/or advisor names are ineligible and will not be reimbursed with Perkins funding. Contact the CTSO for assistance to receive an Iowa Perkins eligible invoice.

| Iowa CTSOs with Qualifying, Perkins eligible Memberships | Iowa CTSOs without Qualifying Perkins eligible Memberships |
|---|--|
| Business Professionals of America (BPA) Future Business Leaders of America (FBLA) Family, Career and Community Leaders of America (FCCLA) FFA HOSA-Future Health Professionals National Professional Agriculture Student Organization (PAS) SkillsUSA Technology Student Association (TSA) | DECA |

Invoice Instructions

Business Professionals of America (BPA)

Eligible Plan: Complete the [Chapter Affiliation Membership](#) process for Iowa BPA

The invoice provided by BPA requires modifications to meet Iowa standards for utilizing Perkins V dollars.

1. Complete the Chapter Affiliation Membership process and submit members in the BPA Membership System.
2. Download the generated invoice
3. Complete payment with your school (Perkins V dollars are reimbursable dollars)
4. Send the invoice (following processed payment) to djones@iowalakes.edu and request an Iowa qualifying invoice by copying the following information into the body of the email

Hello,

I am an advisor of [insert chapter name] in Iowa. I recently completed the Chapter Affiliation Membership process and will be submitting my invoice to my school's Perkins coordinator for processing. However, the auto-generated invoice from BPA does not meet the Iowa requirements for invoices.

Can you please assist me in updating the attached invoice by removing the text in the Misc Product Notes column for both the state and national packages on lines [insert what line of the invoice include this statement] and removing all pages that contain student names (leaving page 1 only)?

If you have any questions, please let me know or contact the Iowa CTSO Consultant at the Iowa Department of Education.

Thank you,

[signature]

5. Once an invoice has been received updated from BPA, strike through and remove the amount for any advisor membership or other fees that are not eligible.
6. Submit the updated invoice to your Perkins coordinator for reimbursement.

Sample Qualifying BPA Invoice



If you have any questions or need any additional support, please contact Michele Gordon at mgordon@bpa.org or (614) 895 - 7277 ext. 7479

BPA Membership Invoice

Chapter ID: **-****
 BPA Invoice Number: *****
 Access Code FX4DCD
 Payment URL <https://register.bpa.org/payInvoice>
 Invoice Date: 09/26/2023
 Invoice Amount: **\$1,000.00**
 Terms: Net 30
 Invoice Year: 2023 - 2024

Please remit payment to:

Business Professionals of America
 P.O. Box 729
 Westerville, OH 43086

John Smith
 Sample Chapter
 12345 Street
 City, State, Zip
 Email: sample@bpa.org

Your State Association collects state membership dues directly if applicable. For additional details contact your State Advisor.

Please be aware that there is a 4% convenience fee for credit card payments.

Please include the top section with your payment.



Chapter ID: **-****
 BPA Invoice Number: *****
 Invoice Date: 09/26/2023

Balance Due **\$1,000.00**
 Total Payment Amount **\$0.00**

| Item | Misc Product Notes | Unit Price | Quantity | Amount |
|---|--------------------|------------|----------|-------------------|
| National - Group Membership (Affiliation Model) | | \$650.00 | 1 | \$650.00 |
| Iowa - Group Membership (Affiliation Model) | | \$350.00 | 1 | \$350.00 |
| Invoice Total | | | | \$1,000.00 |
| Balance Due | | | | \$1,000.00 |

Student counts/range are removed from Misc Product Notes

Table of students is removed from invoice

Future Business Leaders of America (FBLA)

Eligible Plan: Complete the [Program Affiliation](#) process for Iowa FBLA

The invoice provided by FBLA meets all Iowa standards for utilizing Perkins V dollars and requires no modifications.

| Iowa FBLA 723 Curtis Ave Chariton, IA 50049 US info@iowafbla.org www.iowafbla.org | | | | | | |
|---|---------------------|-------------|--------------------------------------|--|-------------|-------------------|
| INVOICE | | | | | | |
| BILL TO Davis County FBLA Davis County High School | | | INVOICE DATE TERMS DUE DATE | 1050 10/03/2022 Net 30 11/02/2022 | | |
| DATE | SERVICE | DESCRIPTION | QTY | RATE | AMOUNT | |
| 10/03/2022 | Program Affiliation | | 1 | 1,075.00 | 1,075.00 | |
| Iowa FBLA wants to say thank you for your continued relationship with our organization! You can pay by check or ACH transfer with a bank account and routing number. Payments are due within 30 days. | | | | | BALANCE DUE | \$1,075.00 |

Family, Career and Community Leaders of America (FCCLA)

Eligible Plan: Complete the [Unlimited Members Plan](#) process for Iowa FCCLA

The invoice provided requires modifications to meet Iowa standards for utilizing Perkins V dollars.

1. Complete the Unlimited Members Plan process and submit members in FCCLA Portal.
2. Download the generated invoice.
3. Complete payment with your school (Perkins V dollars are reimbursable dollars).
4. Send the invoice (following processed payment) to atorres@fclclainc.org and request an Iowa qualifying invoice by copying the following information into the body of the email.

Hello,

I am an advisor of [insert chapter name] in Iowa. I recently completed the Unlimited Members Plan process and will be submitting my invoice to my school's Perkins coordinator for processing. However, the auto-generated invoice from FCCLA does not meet the Iowa requirements for invoices.

Can you please assist me in updating the attached invoice by changing the quantity to 1 for both the state and national packages on lines [insert what line of the invoice include this statement] and removing all pages that contain student names (leaving page 1 only)?

If you have any questions, please let me know or contact the [Iowa CTSO Consultant at the Iowa Department of Education](#).

Thank you,

[signature]

5. Once an invoice has been received updated from FCCLA, strike through and remove the amount for any advisor membership or other fees that are not eligible.
6. Submit the updated invoice to your Perkins coordinator for reimbursement.

Sample Qualifying FCCLA Invoice



Invoice

Chapter ID: 14255
 Invoice Number: 136109
 Invoice Date: 01/29/2023 10:25 am
 Invoice Amount: \$0.00
 Terms: Net 30
 Invoice Year: 2022 - 2023

Please remit payment to:

Family, Career and Community Leaders of America
 13241 Woodland Park Rd, STE 100
 Herndon, VA 20171

Please include the top section with your payment.

Chapter ID: 14255 **Balance Due** **\$0.00**
 Invoice Number: 136109 **Total Payment Amount** **\$1275.00**
 Invoice Date: 01/29/2023

Quantity has been updated to 1 and states Flat Rate

Advisor Fee has been struck through

Advisor fee has been removed and claim amount has been reduced and documented

| Item | Misc Product Notes | Unit Price | Quantity | Amount |
|--|----------------------|-------------------|--------------|-------------------|
| Unlimited Leadership Package | Flat Rate | \$775.00 | 1 | \$775.00 |
| National Chapter Adviser Dues | Flat Rate | \$0.00 | 1 | \$0.00 |
| Iowa - State Unlimited Leadership Package | Flat Rate | \$500.00 | 1 | \$500.00 |
| Iowa - Unlimited Leadership Package | Flat Rate | \$0.00 | 1 | \$0.00 |
| Invoice Total | | | | \$1275.00 |
| Payment 03/13/2023 11:18 AM Check | | | | -\$1275.00 |
| Balance Due | | | | \$0.00 |

Only claiming cost of student membership, not chapter advisers

FFA Sample Qualifying Invoice

Eligible Plan: Complete the [Affiliation Dues](#) process for Iowa FFA

The invoice provided by FFA meets all Iowa standards and is eligible for Perkins reimbursement. No modifications are required.



Iowa FFA Association

Attn: Scott Johnson
 1055 SW Prairie Trail Pkwy
 Ankeny, IA 50023
 Phone: (515) 965-7376

| INVOICE | |
|------------------------|-----------|
| Invoice Date | 10/7/2022 |
| Invoice ID | 25364 |
| Amount Due: \$1,076.00 | Page 1 |

CUSTOMER

SHIP TO

Lansing FFA Chapter 0307 2307
 Eastern Allamakee High School
 569 Center St
 Lansing, IA 52151

----- Please detach and return this portion with your remittance -----

| Customer ID | Customer PO No. | Order Date | Shipped Via | FOB |
|-------------|-----------------|------------|-------------|---------|
| 2307 | | 10/7/2022 | | |
| Terms | Due Date | If Paid By | Deduct | Sold By |
| Net 30 | 11/7/2022 | | \$0.00 | |

| Item No. | Description | Qty | Unit | Unit Price | Discount | Extended Price |
|----------|--------------------|------|---------|------------|----------|----------------|
| 19350 | National Dues | 1.00 | Chapter | \$336.00 | | \$336.00 |
| 19351 | State Dues | 1.00 | Chapter | \$360.00 | | \$360.00 |
| 19352 | Chapter Fee | 1.00 | Chapter | \$130.00 | | \$130.00 |
| 19353 | District Dues - NE | 1.00 | Chapter | \$250.00 | | \$250.00 |

2022-2023 Membership; Chapter Fee; District Dues

| | |
|------------------|------------|
| Subtotal | \$1,076.00 |
| Sales Tax | \$0.00 |
| Total | \$1,076.00 |
| Total Due | \$1,076.00 |

Printed on 10/7/2022

HOSA Qualifying Invoice

Eligible Plan: Complete the [Affiliation Dues](#) process for Iowa HOSA

The invoice provided requires modifications to meet Iowa standards for utilizing Perkins V dollars.

1. Complete the National and State Unlimited National and State Chapter Membership plans
2. Download the generated invoice.
3. Complete payment with your school (Perkins V dollars are reimbursable dollars).
4. Send the invoice (following processed payment) to alias.drapeaux@drake.edu and request an Iowa qualifying invoice by copying the following information into the body of the email.

Hello,

*I am an advisor of **[insert chapter name]** in Iowa. I recently completed the Unlimited Members Plan process and will be submitting my invoice to my school's Perkins coordinator for processing. However, the auto-generated invoice from HOSA does not meet the Iowa requirements for invoices.*

Can you please assist me in updating the attached invoice by changing the quantity to 1 for both the state and national packages and removing all pages that contain student names leaving page 1 only.

If you have any questions, please let me know or contact the [Iowa CTSO Consultant at the Iowa Department of Education](#).

Thank you,

[signature]

5. Once an invoice has been received updated from HOSA, strike through and remove the amount for any CTE endorsed instructor or advisor membership or other fees that are not eligible.
6. Submit the updated invoice to your Perkins coordinator for reimbursement.

HOSA Eligible Invoice



INVOICE

P57334

Iowa HOSA
Kent Seuferer
723 Curtis Ave, Chariton, IA 50049
Tax ID: 421322749
Phone: +1 515-523-0514; director@iowahosa.org; Website:
www.iowahosa.org

Invoice No#: 0021
Invoice Date: Oct 7, 2022
Due Date: Nov 6, 2022

V0329440
11/2/22
LD

\$8,993.00
AMOUNT DUE

BILL TO

Northeast Iowa Community College
Dawn Sanderman
1625 Hwy 150 S., PO Box 400, Calmar 52132, UNITED STATES
sandermand@nicc.edu
Phone: +1 844-642-2338

| # | ITEMS & DESCRIPTION | QTY/HRS | PRICE | AMOUNT(\$) |
|---|---|---------|------------|-----------------------|
| 1 | Chapter Membership Fee - National Chapter | 1 | \$5,290.00 | \$5,290.00 |
| 2 | Chapter Membership Fee - State Chapter | 1 | \$3,703.00 | \$3,703.00 |
| | Subtotal | | | \$8,993.00 |
| | Shipping | | | \$0.00 |
| | TOTAL | | | \$8,993.00 USD |

PAS (National Professional Agriculture Student Organization) Eligible Invoice

Eligible Plan: Complete the [Affiliation Dues](#) process for Iowa PAS

The invoice provided by PAS meets all Iowa standards and is eligible for Perkins reimbursement. No modifications are required.

National PAS
5775 Wayzata Blvd. Suite 700
Minneapolis, MN 55416 US
+16123551266
nationalpasorg@gmail.com
www.nationalpas.org



INVOICE

BILL TO
Kevin Butt
Ellsworth Community College
1100 College Ave
Iowa Falls, IA 50126

INVOICE # 2292
DATE 11/01/2024
DUE DATE 12/01/2024
TERMS Net 30

| ACTIVITY | QTY | RATE | AMOUNT |
|---|-----|--------|--------|
| Dues:Chapter Affiliation Dues 2024-25 Chapter Dues | 1 | 500.00 | 500.00 |

Thank you for your support!

BALANCE DUE

\$500.00

COPY

SkillsUSA Eligible Invoice

Eligible Plan: Complete the [Total Participation Plan \(HS\) or the Campus Affiliation Plan \(PS\)](#)

The invoice provided by SkillsUSA requires modifications to meet Iowa standards for utilizing Perkins V dollars.

1. Complete the TPP or CAP process and submit members in SkillsUSA Register.
2. Download the generated invoice.
3. Complete payment with your school.
4. Send the invoice (following processed payment) to statedirector@skillsusaiowa.org and request an Iowa qualifying invoice by copying the following information into the body of the email.

Hello,

I am an advisor of [insert chapter name] in Iowa. I recently completed the [TPP or CAP] process and will be submitting my invoice to my school's Perkins coordinator for processing. However, the auto-generated invoice from SkillsUSA Register does not meet the Iowa requirements for invoices.

Can you please assist me in updating the attached invoice by removing the numbers of the range from line [insert what line of the invoice include this statement] and updating the quantity on that same line to a value of 1?

If you have any questions, please let me know or contact the [Iowa CTSO Consultant at the Iowa Department of Education](#).

Thank you,

[signature]

5. Once an invoice has been received updated from SkillsUSA, strike through and remove the amount for any advisor membership (Professional Affiliation) or other fees that are not eligible.
6. Submit the updated invoice to your Perkins coordinator for reimbursement

Sample Qualifying SkillsUSA Invoice


SkillsUSA
 14001 SkillsUSA Way
 Leesburg, VA 20176-5494
 (703) 737-0616 fax: (703) 777-1306
 www.skillsusa.org
 Federal Tax ID: 52-0812433

Affiliation INVOICE
 Date: 11/15/2019 Invoice #:
 Chapter ID:
Amount Due: \$0.00

Bill To: Accounts Payable
 Primary Address:

[Click Here to Pay By Credit Card or eCheck](#)



Submitted By: _____
 Primary Contact: _____ Affiliation Number: 5042
 PO Number: _____

Payment is expected within 30 days of this invoice. If payment is not received, your student(s) may not be eligible for regional, state, and national activities including officer candidacy, competition, voting delegates, etc. Please allow 3-5 working days for payment (credit card or check) to appear on invoice. If you have any questions, please call the SkillsUSA Support Desk at 844-875-4557 Monday through Friday 8am - 6pm EST.

Advisor Fee has been struck through

Participant range has been removed and quantity has been updated to 1

Advisor fee has been removed and claim amount has been reduced and documented

| Line Item Description | Qty | Price |
|--|---------------|---------------------|
| Professional Affiliation | 28 | \$784.00 |
| Total Participation Plan Student Affiliation | 1 | \$3,770.00 |
| Career Essentials: Assessments | | \$240.00 |
| Career Essentials: Experiences | | \$4,859.15 |
| Educational Resource Materials | | \$0.00 |
| Invoice Total: | | \$9,653.15 |

Please note that any overpayments of \$35 or less of the invoiced amount will not be returned.

Payments

| Payment Type | Document # | Date | Amt Paid | Applied |
|-------------------------|------------|------------|-------------------|------------|
| CREDIT | 5258 | 11/25/2019 | \$9,653.15 | \$9,653.15 |
| Totals Payments: | | | \$9,653.15 | |

Only claiming
 \$8,869.15
 (removed \$784 in
 advisor fees from
 Perkins claim)

Technology Student Association (TSA)

Eligible Plan: Complete the [Blue CAP \(Chapter Affiliation Plan\)](#) process for Iowa TSA

The invoice provided by TSA requires modifications to meet Iowa standards for utilizing Perkins V dollars.

1. Complete the Blue CAP process and submit members in the TSA National Membership Database
2. Download the generated invoice
3. Complete payment with your school (Perkins V dollars are reimbursable dollars)
4. Send the invoice (following processed payment) to the [Database Manager at National TSA](#) and request an Iowa qualifying invoice by copying the following information into the body of the email

Hello,

I am an advisor of [\[insert chapter name\]](#) in Iowa. I recently completed the Blue CAP process and will be submitting my invoice to my school's Perkins coordinator for processing. However, the auto-generated invoice from National TSA does not meet the Iowa requirements for invoices.

Can you please assist me in updating the attached invoice by removing the words "(Student Members)" from lines [\[insert what lines of the invoice include this statement\]](#)?

If you have any questions, please let me know or contact the [Iowa CTSO Consultant at the Iowa Department of Education](#).

Thank you,

[\[signature\]](#)

5. Once an invoice has been received updated from National TSA, strike through and remove the amount for any advisor membership or other fees that are not eligible
6. Submit the updated invoice to your Perkins coordinator for reimbursement

Sample Qualifying TSA Eligible Invoice



2022 - 2023 Affiliation Invoice

Invoice # M23993 Iowa City West High Date 10/27/2022

| BILL TO |
|---|
| Accounts Payable Iowa City West High 1725 North Dodge St. Attn: Dominic Audia Iowa City, IA 52245 UNITED STATES OF AMERICA |

| SHIP TO |
|--|
| Keith Kraeplin Iowa City West High 2901 Melrose Ave Attn: Dominic Audia Iowa City, IA 52246 |

Chapter ID: 2576

| Item | Quantity | Unit Price | Total |
|--|--------------|--------------------|----------------------|
| National Blue CAP TSA Membership | 1 | \$400.00 | \$400.00 |
| National Chapter Advisor Fee | 1 | \$10.00 | \$10.00 |
| Iowa State Blue CAP TSA Membership | 1 | \$190.00 | \$190.00 |
| Iowa State Chapter Advisor Fee | 1 | \$10.00 | \$10.00 |
| Online: High School Total TSA – Curriculum Materials | 1 | \$0.00 | \$0.00 |
| Chapter Affiliation Program Total | | | \$610.00 |
| Payment 11/22/2022 8:00 AM Check 401575 | | | -\$610.00 |
| Balance Due | | | \$0.00 |

Please provide your financial office with a copy of this invoice for payment. Hard copies will be mailed by request only. Payment is due 30 days after invoice date.

Please remit payment to:

Technology Student
Association 1904 Association
Drive
Reston VA 20191

703-860-9000

Subtract ineligible advisor fees from invoice
total \$610.00-\$20.00
= \$590.00

Perkins eligible =
\$590.00