IDEA PBC Application

Budget Instructions

Part C Funds

Birth to 3

Updated June 2026



IOWA Department of Education

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IDEA PBC Application Overview

This application is a required fiscal monitoring tool used to monitor the activities of subrecipients who receive federal IDEA Part C funds and state Birth to 3 funds through the Iowa Department of Education. AEAs will use this application to complete the IDEA Part C and Birth to 3 budget and to submit claims against the approved budget.

Fiscal monitoring for IDEA Part C and Birth to 3 funds is required by the Code of Federal Regulation's Uniform Administrative Requirements for Federal Awards 34 C.F.R. §§ 300.149, and 300.600 through 300.602 and Iowa Administrative Code r. 281-120.

Accessing the Application

The application is located in the Iowa Education Portal (EdPortal). Instructions to access the application are provided below.

- Access the EdPortal at portal.ed.iowa.gov.
- Click the A&A Account menu.
- Choose the Sign-In option.
- Enter the Account ID and Password as prompted.
- Under the EdInfo heading, select IDEA-PBC to enter the application.
- Users can request access to the application through the Edit Profile and Request Roles option.

Preparing to Enter Budget Information

Identify the AEA stakeholders (e.g., Special Education Administrator, Early Access Liaison, and School Business Official) who will work together to prepare the budget information for entry. The AEA will report how IDEA Part C and Birth to 3 funds are planned to be used throughout the school year as part of the budget submission. IDEA Part C and Birth to 3 allocation amounts are pre-loaded into each AEA's budget and are available on the Department's Special Education Finance web page.

Budget Life Cycle

Once the AEA completes the budget and certifies it to the Department, the Department will conduct a review and either return the budget with comments/questions or approve the budget.



Instructions Organization

The instructions are organized by each Budget Detail Page. A description of each Budget Detail Page is provided below.

Page Name	Use
Screen Status	Illustrates a high level status summary of each page, including the required application pages and the submission status.
General Information	AEA will submit contact information for related AEA leadership.
Use of Funds & Budget	AEA will submit proposed expenditures by budget category.
Salaries, Benefits, & Travel	AEA will submit budget details for anticipated costs related to salaries, benefits, and travel.
Contracts	AEA will submit budget details for anticipated costs related to contracts.
Budget Summary	AEA will submit a narrative for Use of Funds and Apportioning Costs.
Assurances	This page lists each assurance required to be made by the AEA and is the final page to complete before the budget can be certified to the Department.

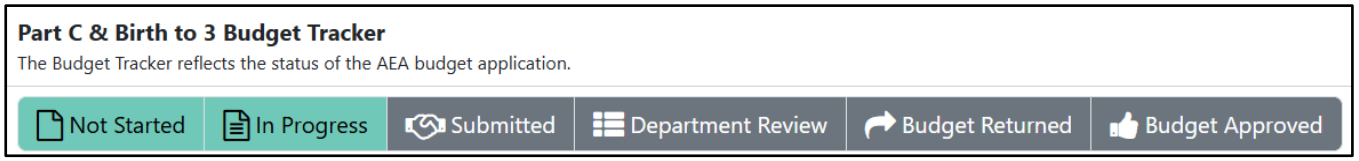
Application Landing Page

Purpose

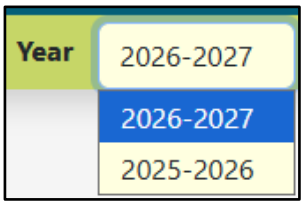
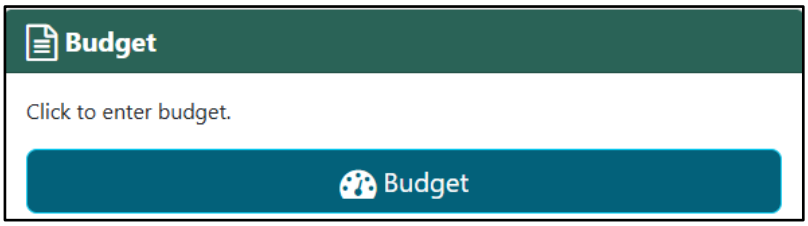
Users can access the budget detail or the claims detail for the current fiscal year as well as the five previous fiscal years (as they become available).

Budget Tracker

The Budget Tracker reflects the status of the budget submission. The tracker must show the budget as Submitted in order for the Department to review and make a determination.



Steps to Access the Budget

Step	Action
1	Select the desired fiscal year in the upper right-hand corner. 
2	Click on Budget to enter the budget. 

Insider Tip

Click on Contact to locate the Department contact information for questions.



Screen Status

Purpose

Identify the budget pages that are required for certification and display the status of each page. The information on this screen will update as the individual pages are submitted.

Use

The General Information page, Use of Funds & Budget page, Budget Summary page, and Assurances page are always required. The requirement for other pages to be completed is dependent upon the expenditure types included in the Use of Funds & Budget page.

Application Page	Required For Certification	Started	Started Date	Submitted	Submitted Date	Updated By
General Information	Yes	No		No		
Use of Funds & Budget	Yes	No		No		
Salaries & Benefits, & Travel	N/A	N/A		N/A		
Contracts	N/A	N/A		N/A		
Budget Summary	Yes	No		No		
Assurances	Yes	No		No		



Insider Tip

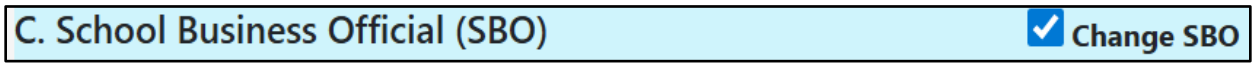
Once all required pages have been completed, click on the Assurances tab to certify and complete the budget submission.

Budget Detail Page: General Information

Purpose

Displays the contact information for the Administrator (Part A. Application Agency), Early Access Liaison (Part B. Early Access Liaison), School Business Official (Part C. SBO), and the Special Education Administrator (Section E. Special Education Administrator).

Steps to Complete the General Information Page

Step	Action
1	**A. Application Agency** Displays the AEA name, Administrator name, address, and telephone number as reported in the School Information Update application located in the EdPortal. Verify this information is accurate.  **Insider Tip** If this information is incorrect, exit the IDEA PBC Application and update the School Information Update application in the EdPortal. Log back into the IDEA PBC Application and verify this information has been updated.
2	**B. Early Access Liaison** Displays the Early Access Liaison contact information. Verify this information is accurate or update, if needed.
3	**C. School Business Official (SBO)** Displays the School Business Official contact information as reported in the School Board Officers application located in the EdPortal. Verify this information is accurate or update, if needed. To Update: Click on the check box next to Change SBO which will allow the information to be edited.   **Insider Tip** Determine whether the AEA's SBO/CFO contact information also needs to be updated in the School Board Officers application.
4	**D. Project Duration** Displays the dates for the current period, CFDA#, source code, and project code.
5	**E. Special Education Administrator** Displays the Special Education Administrator contact information. Verify this information is accurate or update, if needed.

6	Once the information is determined to be accurate and complete, click Submit to finish. 
7	The application will advance the user to the Use of Funds & Budget page for AEA input.

Budget Detail Page: Use of Funds & Budget

Purpose

This page is used to capture budgeted expenditures of each eligible expenditure type for Part C and Birth to 3 funds. Additional information will be collected in the budget detail pages based on the expenditure types entered in the budget.

Steps to Complete the Use of Funds & Budget Page

Step	Action
1	Review the Department Allocation line which represents the allocation available to the AEA for Part C (Column 2) and Birth to 3 (Column 3) funds.

Column 1	Column 2	Column 3
Expenditure Type	Part C	Birth to 3
Department Allocation	$ 890,716.00	$ 379,364.00
Allocation Remaining	$ 890,716.00	$ 379,364.00

Insider Tip

The Save as Draft button can be used at any time to save the progress entered on the page. If you navigate off of this page without clicking Save as Draft or Submit, the data entered will be lost.

2	Detail the proposed budget expenditure amount for each Expenditure Type (Lines 1 - 5) related to Part C (Column 2) and Birth to 3 (Column 3) funds. Line 6 will display the total entered on lines 1 through 5.

Column 1	Column 2	Column 3
Expenditure Type	Part C	Birth to 3
Department Allocation	$ 231,830.00	$ 72,575.00
Allocation Remaining	$ 231,830.00	$ 72,575.00
1. Salaries & Benefits	$ 0.00	$ 0.00
2. Travel	$ 0.00	$ 0.00
3. Supplies & Materials	$ 0.00	$ 0.00
4. Contracts	$ 0.00	$ 0.00
5. Indirect Costs	$ 0.00	
6. Total	$ 0.00	$ 0.00

Insider Tip

The AEA may budget for one expenditure type, all expenditure types, or any combination. However, the **total** Department Allocation must be budgeted before the page can be submitted.

3	Review the Validations box at the right of the page and correct as needed. Validation errors will populate if the total budget is under- or over- allocated or if CEIS totals do not match. 
4	Once the AEA's allocation is fully budgeted, click Submit to finish. 

5	After the Use of Funds & Budget page has been submitted, the application will advance the user to the Screen Status page. The Required for Certification column will identify which additional budget pages are required. **Application Page** ⇕ | **Required For Certification** **General Information** | **Yes** **Use of Funds & Budget** | **Yes** **Salaries & Benefits, & Travel** | **Yes** **Contracts** | **Yes** **Budget Summary** | **Yes** **Assurances** | **Yes** **Insider Tip** Supplies & Materials and Indirect Costs included in the budget, will not show on the Screen Status page as additional information is not required for these Expenditure Types.
6	Select the appropriate tabs positioned at the top of the budget page that are Required For Certification to complete the budget process. **Salaries, Benefits, & Travel »** | **Contracts »** | **Budget Summary »**

Insider Tip

Even after submission, this page can still be modified until the entire budget has been certified on the Assurances page.

Budget Detail Page: Salaries, Benefits, & Travel

Purpose

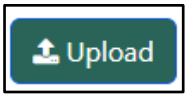
This page is used to collect detail for the related amount, if any, budgeted on the Use of Funds & Budget page and information as required in Uniform Guidance for Federal Awards (2 CFR 200.430), which includes the AEA's policy and procedures for tracking time and effort for employees paid with federal funds.

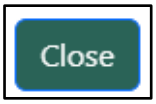
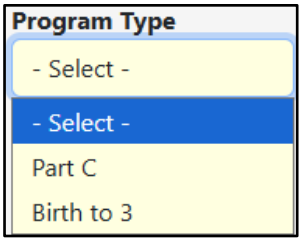
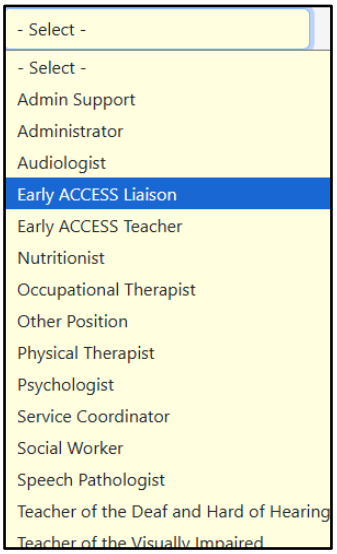
Time & Effort: Policy or Business Process

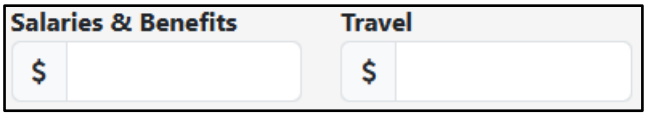
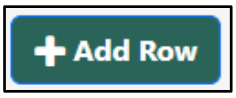
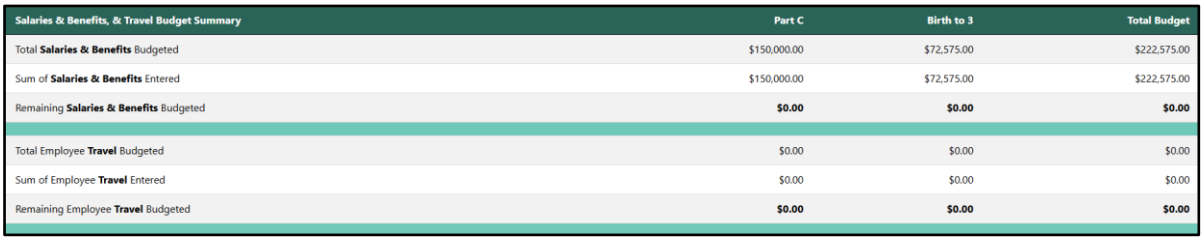
In order to meet the requirements as required in Uniform Guidance for Federal Awards (2 CFR 200.430), the district must provide either a district policy or district business process for tracking time and effort for employees paid with federal funds.

- Policy may detail general requirements for documenting proof of time and effort.
- Business processes may identify actual operational steps that occur for documentation to be collected and for work to be verified as attributable to the program.
- *Note:* Proof of time and effort will be required as part of the Claims process.

Steps to Complete the Salaries, Benefits, & Travel Page

Step	Action
1	Click on the Policy Files button to upload the AEA's policy or business process for tracking time and effort for employees paid with federal funds. 
2	Click the Choose File button to select the file to be uploaded. 
3	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 
4	Click on the Upload button to upload the file. 
5	Click on Close to return to the Salaries, Benefits, & Travel page.

	
6	Click on the Program Type drop-down menu and select the appropriate program type (Part C or Birth to 3 funds). 
7	Click on the Position/Title drop-down menu and select the appropriate position title for the category of employees included in the budget.  **Insider Tip** Individual staff members do **not** need to be entered separately. For example, an AEA who will use federal funds for two Nutritionists only needs to add one row for the aggregate number of FTEs.
8	Enter the Description of Work to be performed by the selected category. 

9	Enter the anticipated aggregate FTE Total for the selected category. 
10	Enter the total cost of Salaries & Benefits and/or Travel for the selected category. 
11	Click on Add Row. 
12	Once the row has been added, it can be edited or removed by clicking on the related button.  **Insider Tip** The Salaries, Benefits, & Travel Budget Summary located at the bottom of the screen will display the Total Budgeted, the Sum Entered, and the Remaining Budgeted for each expenditure type. This information can be referenced to assist when adding detail rows. Continue to add rows until the Remaining Balance equals zero for each expenditure type. 
13	Once the Remaining Budgeted equals zero for all expenditures types, click Submit to finish. 
14	Upon successful submission, the user will be returned to the Screen Status page. Navigate to the next tab that is Required For Certification to continue.

Salaries & Benefits, & Travel Budget Summary	Part C	Birth to 3	Total Budget
Total **Salaries & Benefits** Budgeted	$150,000.00	$72,575.00	$222,575.00
Sum of **Salaries & Benefits** Entered	$150,000.00	$72,575.00	$222,575.00
Remaining **Salaries & Benefits** Budgeted	**$0.00**	**$0.00**	**$0.00**
Total Employee **Travel** Budgeted	$0.00	$0.00	$0.00
Sum of Employee **Travel** Entered	$0.00	$0.00	$0.00
Remaining Employee **Travel** Budgeted	**$0.00**	**$0.00**	**$0.00**

Insider Tip

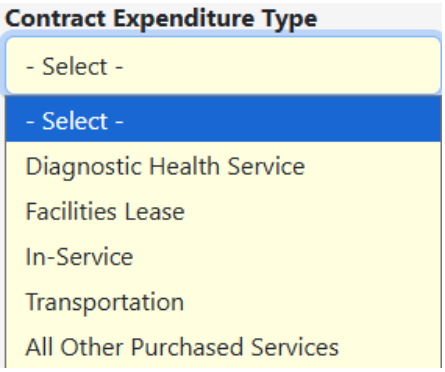
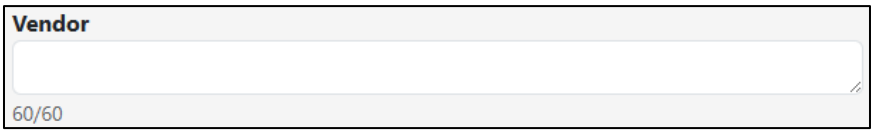
Once this page has been submitted, it can still be modified until the entire budget has been certified on the Assurances page.

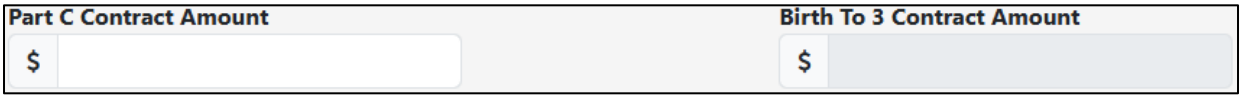
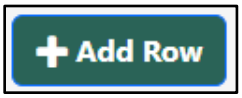
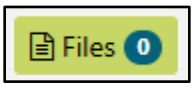
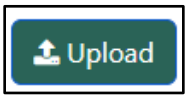
Budget Detail Page: Contracts

Purpose

This page is used to collect detail for the related amount, if any, budgeted on the Use of Funds & Budget page.

Steps to Complete the Contracts Page

Step	Action
1	Click on the Contract Expenditure Type drop-down menu and select the appropriate expenditure type for the contract. 
2	Enter the name of the Vendor that will provide the contracted services.  **Insider Tip** A separate row must be added for each individual contract.
3	Enter the contracted Service(s) to be provided by the vendor. 

4	Enter a detailed Description of the contracted services being provided. 
5	Enter the amount for the contracted service in the related field (Part C Contract Amount or Birth to 3 Contract Amount). 
6	Click on Add Row. 
7	A copy of the related contract is required for each row. Click on the Files button next to the added row to add a file. If an executed contract is not available, a drafted contract or narrative of the intent of the contract can be used for budgeting purposes. The executed contract and related invoices will be required for the claims process.   **Insider Tip** As files are added, this tab will update to display the number of files uploaded.
8	Click the Choose Files button to select the file to be uploaded. 
9	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 
10	Click on the Upload button to upload the file. 

11	Click on Close to return to the Contracts page. 
12	Once the row has been added, it can be edited or removed by clicking on the appropriate button next to the added row. If the row being removed includes an uploaded file, the file must be removed before removing the row.  **Insider Tip** The Contracts Budget Summary located at the bottom of the screen will display the Total Budgeted, the Sum Entered, and the Remaining Budgeted for each expenditure type. This information can be referenced to assist when adding detail rows. Continue to add rows until the Remaining Contracts Budgeted is $0.00 for both Part C and Birth to 3 funds. 
13	Once detailed rows have been added for all expenditures types, click Submit to finish. 
14	Upon successful submission, the user will be returned to the Screen Status page. Navigate to the next tab that is Required For Certification to continue.

Contracts (Non-Tuition, Non-Transportation) Budget Summary	Part C	Birth to 3	Total Budget
Total **Contracts** Budgeted	$5,000.00	$1,000.00	$6,000.00
Sum of **Contracts - Diagnostic Health Service** Entered	$1,000.00	$1,000.00	$2,000.00
Sum of **Contracts - Facilities Lease** Entered	$0.00	$0.00	$0.00
Sum of **Contracts - In-Service** Entered	$1,000.00	$0.00	$1,000.00
Sum of **Contracts - Transportation** Entered	$0.00	$0.00	$0.00
Sum of **Contracts - All Other Purchased Services** Entered	$3,000.00	$0.00	$3,000.00
Remaining **Contracts** Budgeted	**$0.00**	**$0.00**	**$0.00**

Insider Tip

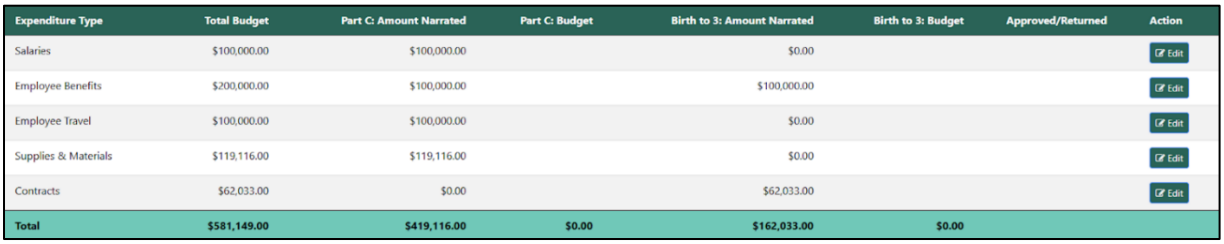
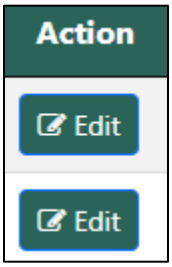
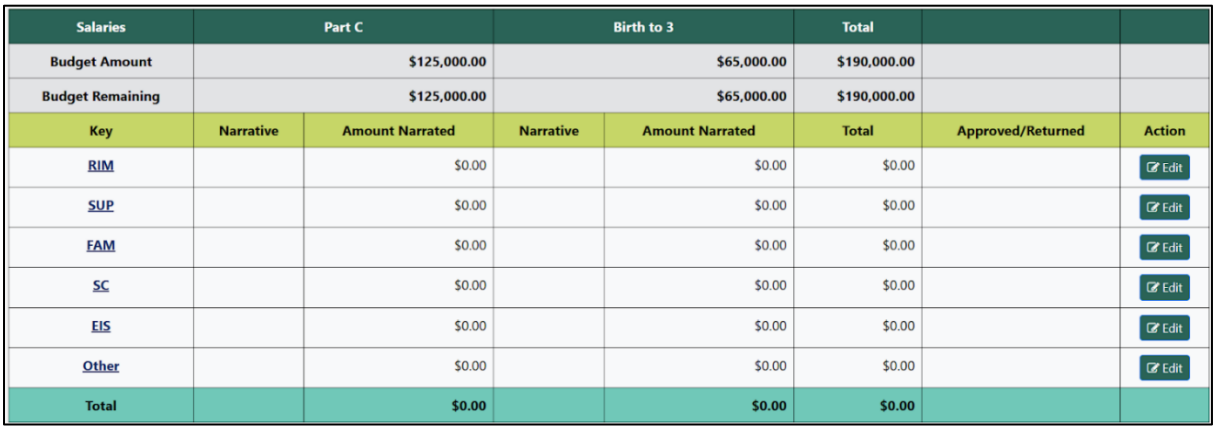
Once this page has been submitted, it can still be modified until the entire budget has been certified on the Assurances page.

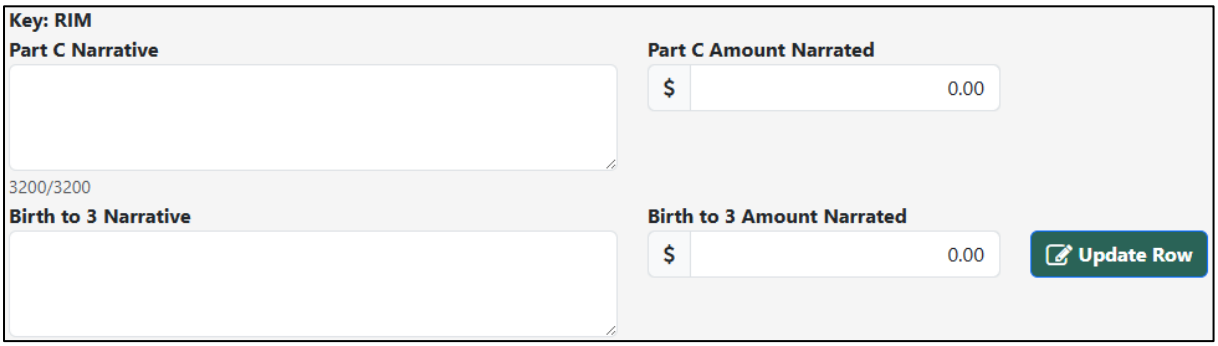
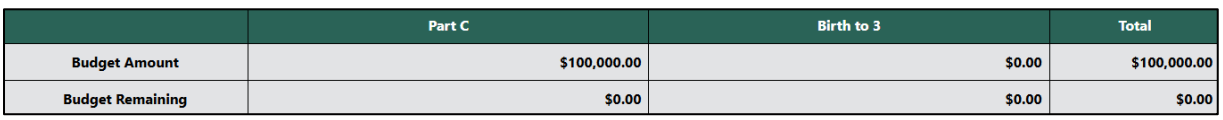
Budget Detail Page: Budget Summary

Purpose

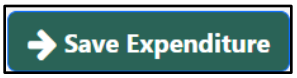
This page is used to collect the narrative for Use of Funds and Apportioning Costs.

Steps to Complete the Budget Summary Page

Step	Action
1	The Use of Funds Narrative & Budget Summary table will display all Expenditure Types included on the Use of Funds & Budget page, except Indirect Costs. Narrative is required for each Expenditure Type listed. 
2	Click the Edit button located under the Action column for the specific Expenditure Type budgeted. This step will be repeated for each Expenditure Type. 
3	The Use of Funds Narrative table will display for the Expenditure Type selected. 

4	Identify the related Key(s) for the Expenditure Type, then click Edit in the Action column. This step will be repeated for each Key as necessary for each Expenditure Type.  **Insider Tip** If the AEA budget includes salaries and benefits, the narrative provided for both the Salaries expenditure line and Benefits expenditure line can be the same.
5	The Narrative detail will display for the selected Key code for the Expenditure Type being edited. 
6	Enter the related Part C Narrative and Part C Narrated Amount that applies to the selected Key code for the Expenditure Type being edited. 
7	Enter the Birth to 3 Narrative and Birth to 3 Amount that applies to the selected Key code for the Expenditure Type being edited. 
8	Continue to Edit the Key codes for the Expenditure Type being edited until the Budget Remaining equals $0.00. 

	Part C	Birth to 3	Total
Budget Amount	$100,000.00	$0.00	$100,000.00
Budget Remaining	$0.00	$0.00	$0.00

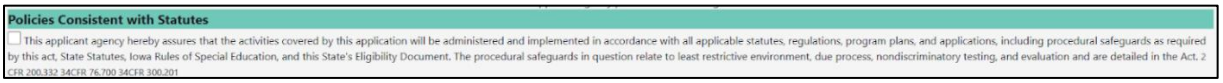
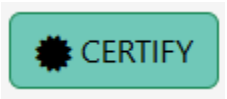
9	Click Save Expenditure to save the information entered and to move to the next Expenditure Type. Repeat this process with all Expenditure Types included in the budget. 
10	Once all Expenditure Types have been narrated, click Submit to finish. 
10	Upon successful submission, the user will be returned to the Screen Status page. **Insider Tip** If all Required For Certification pages are complete, navigate to the Assurances tab to Certify the budget.

Assurances

Purpose

This page collects assurances and allows for final budget certification.

Steps to Complete the Assurances Page

Step	Action
1	Agree to each assurance by checking the box next to each assurance. 
2	In the Certification and Assurance section located at the bottom of the page, review the Name of Agency's Authorized Official for Applicant Agency, Date, and Applicant Agency.
3	Enter the Authorized Official's Title. 
4	Click Certify to finish.  **Insider Tip** Clicking the Certify button will submit the budget to the Department for review. The budget remains available in read-only mode. If changes are necessary, contact the Department.

Insider Tip

All pages Required For Certification on the Screen Status page must reflect Yes in the Submitted column before the Assurances page can be accessed. If the Assurances page is not accessible, return to the Screen Status page to determine which pages are required, but have not been submitted.

Budget Review Process

The Department will be notified upon budget certification. The Department will review the budget and either approve or return the budget.

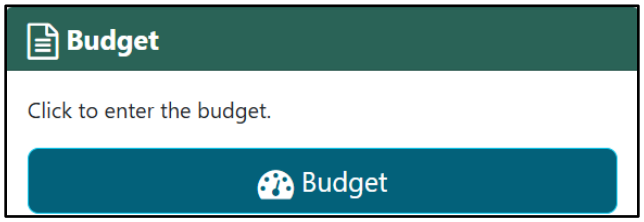
Approved

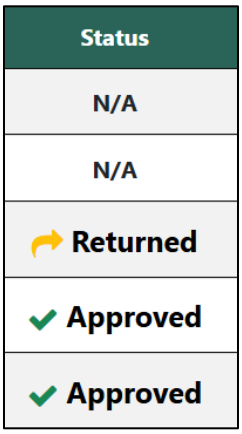
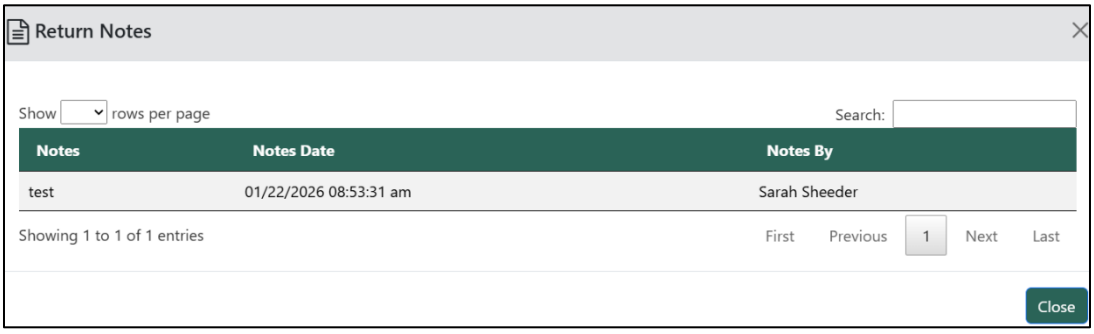
- If the budget is approved by the Department, a GAN award notification letter will be sent via email with award details. No further action is required until the claims period becomes available.

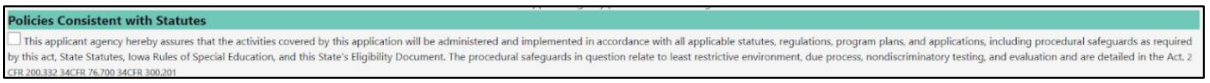
Returned

- If the Department returns the budget, one or more of the budget detail page(s) require further action by the AEA.

Steps to Re-Certify a Returned Application

Step	Action
1	Log in to the EdPortal.
2	Click EdInfo and select IDEA – PBC. The Budget Tracker on the Home page will highlight the Budget Returned. 
3	Click on Budget. 

4	On the Screen Status page, review the Status column to identify the budget detail page(s) that have been returned and require further action. 
5	Access the budget detail page that has been returned by clicking on the appropriate tab at the top of the page. 
6	On the detail budget page, the table will display which rows have been returned in the Approved/Returned column. 
7	Click on the information icon next to the Returned status to review the Department comments. 
8	After Department's comments have been reviewed, click Close to return to the budget detail page. 

9	The returned rows can be updated by clicking on Edit, or removed by clicking on Remove. 
10	After updates are completed, click on Submit to save the changes. 
11	The application will return to the Screen Status page. Complete this process with all budget detail pages that were returned.
12	Once all returned pages have been submitted, navigate to the Assurances page. 
13	Read each listed assurance and confirm by checking the box next to each assurance. 
14	In the Certification and Assurance located at the bottom of the page, review the Name of Agency's Authorized Official for Applicant Agency, Date, and Applicant Agency.
15	Enter the Authorized Official's Title. 
16	Click Certify to finish.  **Insider Tip** Clicking the Certify button will submit the budget to the Department for review. The budget remains available in read-only mode. If changes are necessary, contact the Department.

Budget Amendments

If the AEA determines that an amendment is needed to a previously approved budget, email the Special Education Finance Team.