IDEA PBC Application

Claims Instructions

Part B

Updated April 2026

IOWA | Department of Education

Contents

IDEA PBC Application – Claims Overview

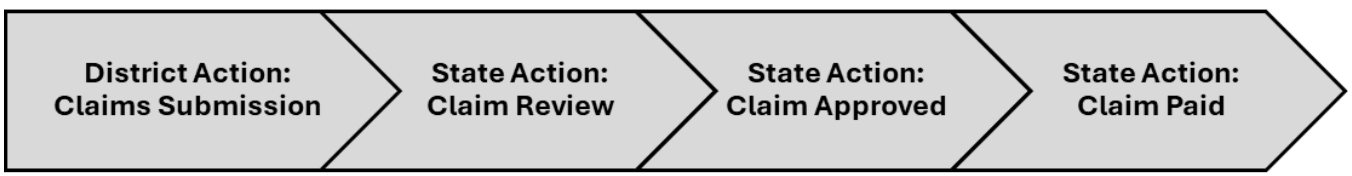
The IDEA PBC Application is used to monitor the activities of subrecipients who receive federal IDEA Part B funds through the Iowa Department of Education as required by the Code of Federal Regulation's Uniform Administrative Requirements for Federal Awards 34 C.F.R. §§ 300.149, and 300.600 through 300.602. Districts. The Claims section of the application is used by districts to submit claims against the approved budget.

Location of the IDEA PBC Application

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

- Visit the EdPortal at portal.ed.iowa.gov.
- Click the "A&A Account" heading.
- Choose the Sign-In option.
- Enter the Account ID and Password as prompted.
- Note: Options are available on this screen if the Id or Password have been forgotten. In addition, a new user can create an account from this screen. District personnel assigned as the security person can give permission for the availability and use of the various data collections.

IDEA PBC Claims Life Cycle



Preparing to Enter Claims Information

The district will provide additional documentation for the expenditure types included in the file upload. The table below provides a summary of claims detail pages and the required documentation needed on each page.

Page Name	Use	File Upload(s) Required
Screen Status	Illustrates a high level status summary of each page, including the required application pages and the submission status.	N/A
General Information	Submit contact information for related district leadership.	N/A
File Upload	Upload a .csv file from accounting software to report current expenditures.	N/A

Staff Assignment	Report all employees who are fully or partially funded with IDEA Part B funds.	• Employee Staff Assignment
Salaries, Benefits, & Travel	Submit claim details for reported costs related to salaries, benefits, and travel.	• Time & Effort Documentation • Travel Documentation
Supplies & Materials	Submit claim details for reported costs related to supplies and materials.	• Invoice
Contracts	Submit budget details for reported costs related to contracts.	• Updated contract (if changed from Budget upload) • Invoice
Pupil Transportation	Submit budget details for reported costs related to pupil transportation.	Employee Costs • Time & Effort documentation for employee • Travel documentation (if claimed) Contract Costs • Updated contract (if changed from Budget upload)
Tuition	Submit budget details for reported costs related to tuition.	• Invoice

CEIS	Submit additional details for reported costs, if applicable.	Salaries, Benefits, and/or Travel • Time & Effort documentation for employee • Travel documentation (if claimed) Contracts and/or Supplies & Materials • Updated contract (if changed from Budget upload) • Invoice
Claims Summary	This page will display the Use of Funds Narrative and Apportioning Costs Narrative the district provided in the approved Budget.	N/A
Assurances	This page lists the required assurance and allows final claim certification.	N/A

Application Landing Page

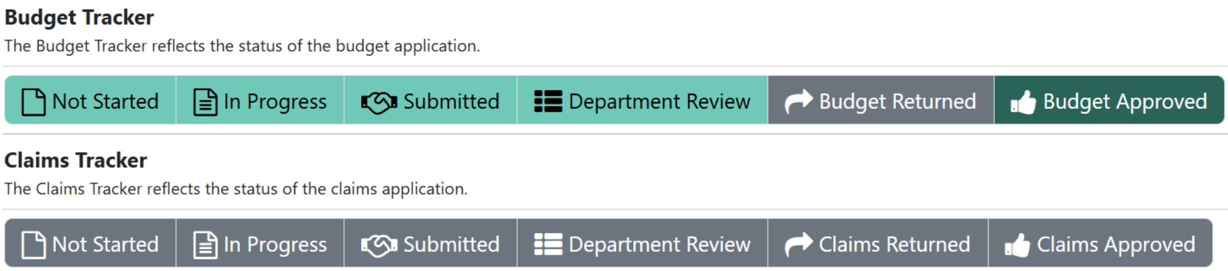
Purpose

Users can access the budget detail or the claims detail. A Budget Tracker and Claims Tracker located on the top of the screen will display the status of the related process.

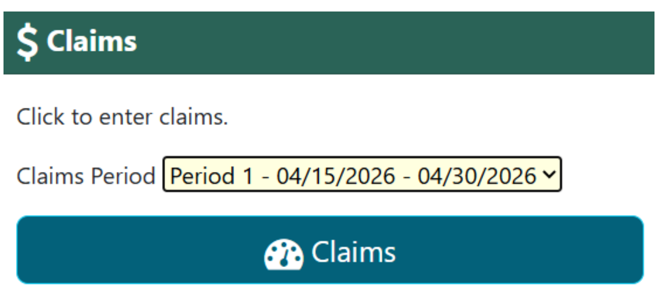
Claims Eligibility: The district must have an approved budget before a claim period is available and can be submitted for payment.

Insider Tip

Select a specific claims period to view the claims tracker for that claim status.

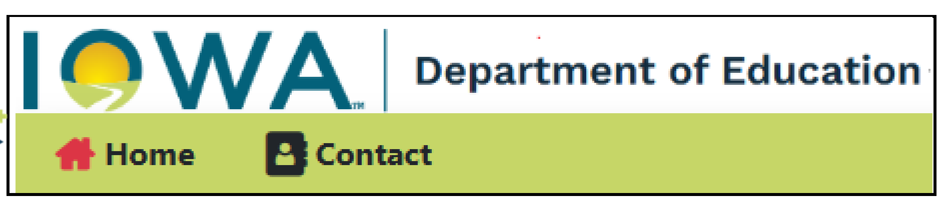


Select the claim period dates being submitted in the drop-down box and click on Claims to enter the claims information.



Insider Tip

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



Screen Status

Purpose

The purpose of the Screen Status page is to identify the claim pages that are required for certification and to display the status of each page. The information on this screen will update as the individual pages are submitted.

Use

The General Information page, File Upload page, and Claims Summary page are always required. The requirement for other pages to be completed is dependent upon the expenditure types included in the File Upload page.

Claims Page	Required For Certification	Started	Started Date	Submitted	Submitted Date	Updated By
General Information	Yes	No		No		
File Upload	Yes	No		No		
Staff Assignment	N/A			N/A		
Salaries, Benefits, & Travel	N/A			N/A		
Supplies & Materials	N/A			N/A		
Contracts (Non-Tuition/Non-Transportation)	N/A			N/A		
Pupil Transportation	N/A			N/A		
Tuition	N/A			N/A		
Coordinated Early Intervening Services (CEIS)	N/A			N/A		
Claims Summary	Yes			No		

Insider Tip

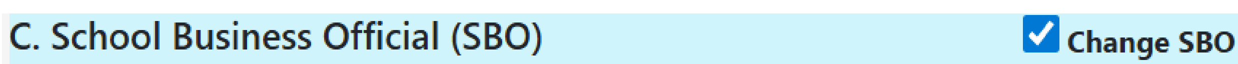
Once all required pages have been completed, click on the Assurances tab to certify and complete the budget submission.

Claim Detail Page: General Information

Purpose

Displays the contact information for the Superintendent (Part A. Application Agency), Project Contact (i.e., Grant Contact) (Part B. Project Contact), and the School Business Official (Part C. SBO) that was submitted in the approved budget. Follow the steps below if changes are needed to this information. If no changes are needed, skip to step 6 and Submit this page.

Steps to Complete the General Information Page

Step	Action
1	**A. Applicant Agency** Displays the Agency 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. Project Contact** If the Project Contract has changed, edit the name, title, telephone number, and email address of the main project (grant) contact for IDEA Part B funds.
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 district's SBO/CFO contact information also needs to be updated in the School Board Officers application available in the EdPortal.

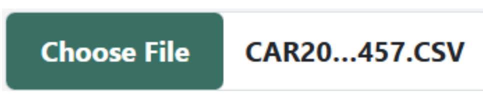
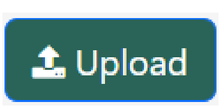
4	**D. Project Duration** Displays the dates for the current period, CFDA#, source code, and project code.
5	Once the information is determined to be accurate and complete, click Submit to finish. 
6	The application will advance the user to the Use of Funds & Budget page for district input.

Claims Detail Page: File Upload

Purpose

This page is used to upload a .csv accounting file from the district's accounting software program to review current IDEA Part B expenditures.

Steps to Complete the File Upload

Step	Action
1	Click on Choose File to upload a .csv accounting file from the district's accounting software program. 
2	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file.  **Insider Tip** The file must be in .csv accounting format and include the following columns: district number, account ID, fund, facility, function program, project, object, source, balance sheet account, and amount.
3	Click Upload.  **Insider Tip** Once the .csv accounting file is uploaded, the system will review the file for all expenditures coded to IDEA Part B project code (4521), The system will identify coding errors and/or expenditures coded to IDEA Part B that were not included in the approved budget.

4	Review the Validations section for coding errors found in the .csv accounting file to expenditures coded to the IDEA Part B project code (4521). **Validations** File upload includes following function code(s) (2620) that are not appropriate to IDEA Part B Funds. **Insider Tip** Amounts reported in the .csv accounting file resulting in an error will *not* appear in the Table of File Upload Results. The claims process cannot continue until the .csv accounting file upload is error free.
5	Correct the coding errors shown in the Validations box in the district's accounting software and upload a corrected .csv accounting file.
6	Once all coding errors have been resolved, review the Error Messages in the Table of File Upload Results.
7	Correct the errors shown in the Error Messages column in the district's accounting software and upload a corrected .csv accounting file.
8	Once all Error Messages have been resolved, review the Claims File Upload Summary which displays each Claim Period as well as the Expenditure Types claimed in each. If the district does not have CEIS expenditures in the approved budget, skip to step 12.

Table of File Upload Results

Expenditure Type	Amount: Approved Budget	Amount: .csv File Upload	Error Messages
Salaries (Instructional)	$0.00	$10,000.00	File upload includes costs for an allowable cost to IDEA funds but were not included in the original budget.

Expenditure Type	Budget	Claim Period 1	Claim Period 2	Claim Period 3	Total Claimed	Remaining Balance
Salaries (Instructional)	$0.00				$0.00	$0.00
Employee Benefits	$0.00				$0.00	$0.00
Employee Travel	$0.00				$0.00	$0.00
Supplies & Materials (Consumables)	$0.00				$0.00	$0.00
Contracts (Non-Tuition, Non-Transportation)	$0.00				$0.00	$0.00
Pupil Transportation	$0.00				$0.00	$0.00
Tuition	$75,536.00	$37,768.00			$37,768.00	$37,768.00
Total	**$75,536.00**	**$37,768.00**	**$0.00**	**$0.00**	**$37,768.00**	**$37,768.00**

9 If the district has CEIS expenditures in the approved budget, click on CEIS Split located at the bottom of the screen.

Click on "CEIS Split" button to enter split values for CEIS portion CEIS Split

10 Enter the amounts from the .csv accounting file upload that reflect CEIS expenditures.

Enter CEIS Split amount by expenditure type for each applicable line item.

Expenditure Type	Budget CEIS Amount	File Submission Amount	Coordinated Early Intervening Services Amount	Special Education Instruction Amount
Salaries (Instructional)	$ 22,400.00	$ 15,000.00	$ 12,500.00	$ 2,500.00
Employee Benefits	$ 3,826.00	$ 1,250.00	$ 1,250.00	$ 0.00
Employee Travel	$ 0.00	$	$ 0.00	$ 0.00
Supplies & Materials (Consumables)	$ 0.00	$	$ 0.00	$ 0.00
Contracts (Non-Tuition, Non-Transportation)	$ 0.00	$ 5,000.00	$ 0.00	$ 5,000.00

11 Click Save to finish.

Save

12 Click Submit to finish.

Submit

Claims Detail Page: Staff Assignment

Purpose

The purpose of this page is to provide a list of all district employees who are fully or partially paid with IDEA Part B funds as well as an upload of the employee's staff assignment information.

Steps to Complete the Staff Assignment Claims Page

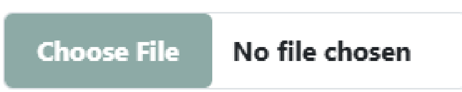
Staff information can be uploaded using the Staff Assignment Template or through manual entry on this page. Follow the appropriate steps below depending on which method is selected.

Insider Tip

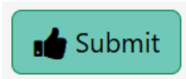
Once a staff assignment template is uploaded at the beginning of the year, additional staff can be entered manually.

Option 1: Steps to Enter Staff Assignment via Staff Assignment Template

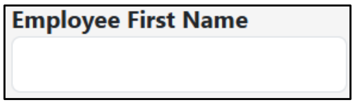
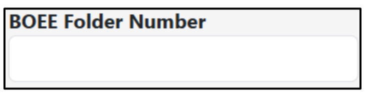
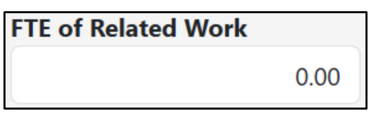
Step	Action
1	Download the Staff Assignment Template located under Steps to Download and Upload a .csv file. **Step 1:** Download the **Staff Assignment Template** Enter the information in the Staff Assignment Template by column and as described below.
2	**Column A**: **District Number** Enter District Number.
3	**Column B**: **Employee First Name** Enter Employee First Name.
4	**Column C**: **Employee Last Name** Enter Employee Last Name.
5	**Column D**: **FTE** Enter the Employee's Full-Time Equivalent (FTE) paid from IDEA Part B Funds.
6	**Column E**: **Position Title**

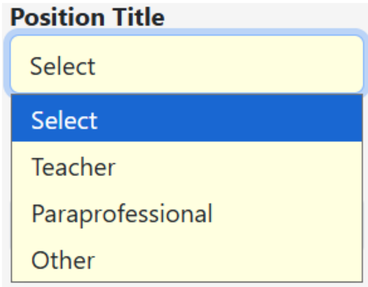
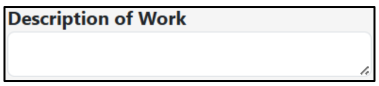
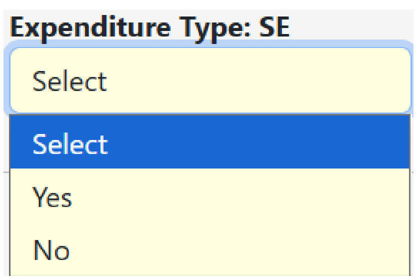
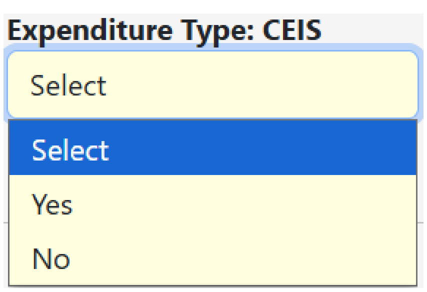
	Enter the Employee’s Position Title (Teacher, Paraprofessional, or Other).
7	**Column F**: **Description of Work** Enter the Employee’s Description of Work. This column is limited to 50 characters.
8	**Column G**: **Expenditure Type - SE (Yes or No)** Enter Yes or No. Yes = Any portion of the employee’s salaries and/or benefits are paid from IDEA Part B funds, special education instruction or pupil transportation required for special education purposes No = CEIS only
9	**Column H**: **Expenditure Type - CEIS (Yes or No)** Enter Yes or No. Yes = CEIS only No = Not CEIS
10	**Column I**: **Expenditure Type - Transportation (Yes or No)** Enter Yes or No. Yes = Portion of the employee’s salaries and/or benefits paid from IDEA Part B funds is for pupil transportation required for special education purposes. No = Not applicable
11	**Column J**: **BOEE Folder Number** Enter the employee’s BOEE Folder Number or employee number. This field is optional for non-teaching staff.
12	After all employees have been added, save the file in .csv format.
13	Click the Choose File button to select the spreadsheet. 
14	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 

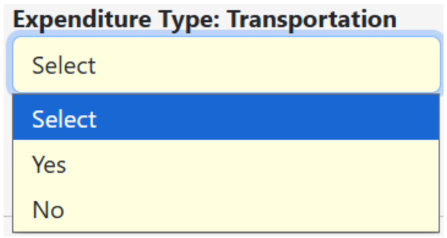
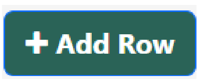
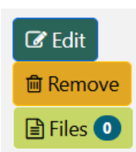
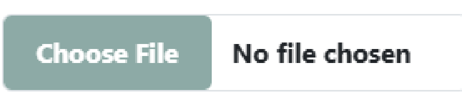
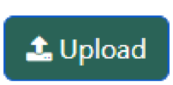
15	Click Upload to upload the file. Upload
16	Click on Close to return to the Staff Assignment page. Close
17	The staff listed on the spreadsheet will display at the bottom of the page under Staff Assignment Detail.
18	Click on Files in the Action column to upload proof of the staff responsibilities. Examples may include: class rosters, assignments, or other documentation that illustrates how staff time is used. Edit Remove Files 0 **Insider Tip** As files are added, this tab will update to display the number of files uploaded.
19	Click the Choose File button to select the file. Choose File No file chosen
20	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. Choose Files Part B ...ad.pdf
21	Click Upload to upload the file. Upload
22	Click on Close to return to the Staff Assignment page. Close

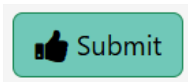
23	After a file has been uploaded for each staff, click Submit to finish. 

Option 2: Steps to Enter Staff Assignments via Manual Entry

Step	Action
1	Enter Employee First Name. 
2	Enter Employee Last Name. 
3	Enter BOEE Folder Number.  **Insider Tip** If the employee does not have a BOEE Folder Number, the district assigned employee number can be used, or this field can be left blank.
4	Enter the employee's full time equivalent (FTE of Related Work) that is paid for with IDEA Part B Funds. 

5	Select the employee’s Position Title from the dropdown box (Teacher, Paraprofessional or Other). 
6	Enter the employee’s Description of Work. 
7	Enter Yes or No. Yes = Any portion of the employee’s salaries and/or benefits are paid from IDEA Part B funds, special education instruction or pupil transportation required for special education purposes No = CEIS only 
8	Enter Yes or No. Yes = CEIS only No = Not CEIS 

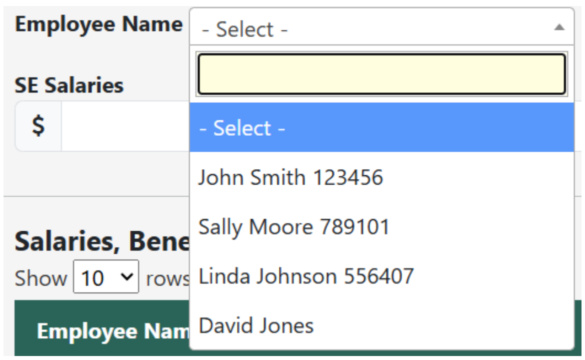
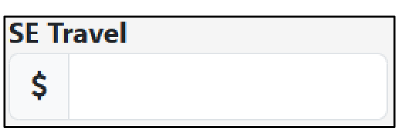
9	Enter Yes or No. Yes = Portion of the employee’s salaries and/or benefits paid from IDEA Part B funds is for pupil transportation required for special education purposes. No = Not applicable 
10	Click Add Row to add the employee to the Staff Assignment Detail table. 
11	Click Files in the Action column to upload proof of the staff responsibilities. Examples may include: class rosters, assignments, or other documentation that illustrates how staff time is used.  **Insider Tip** As files are added, this tab will update to display the number of files uploaded.
12	Click the Choose File button to select the file. 
13	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 
14	Click Upload to upload the file. 

15	Click on Close to return to the Staff Assignment page. 
16	After a file has been uploaded for each staff, click Submit to finish. 

Claims Detail Page: Salaries, Benefits, & Travel

Purpose

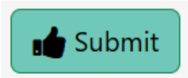
The purpose of this page is to provide detailed employee information for the salaries, benefits, and/or travel expenditures that were reported on the .csv accounting file upload.

Step	Action
1	Select the Employee Name in the dropdown box that has Salaries, Benefits, and/or Travel reported for this claims period.  **Insider Tip** The dropdown box will display the employees listed on the Staff Assignment page. If corrections are needed, navigate back to the Staff Assignment page to update the information.
2	Enter the special education salaries for the selected employee. 
3	Enter the special education benefits for the selected employee. 
4	Enter the special education travel costs for the selected employee. 

5	Click Add Row to add the employee's information to the Salaries, Benefits, & Travel Claims Detail table. + Add Row
6	Once the row has been added, it can be edited or removed by clicking on the related button. Edit Remove
7	Click Choose File to select the employee's time and effort documentation, which must meet the requirements listed in [2 CFR. § 200.430(g)]. Choose File No file chosen
8	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. Choose Files Part B ...ad.pdf
9	Click Upload to upload the file. Upload
10	Click Close to return to the Salaries, Benefits, & Travel page. Close

11

After all employees and related documentation have been uploaded for this claims period, click Submit to finish.



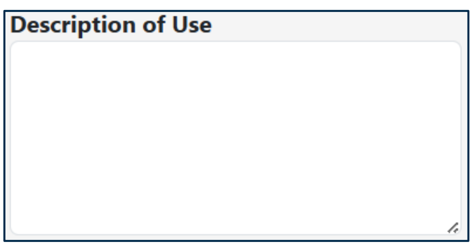
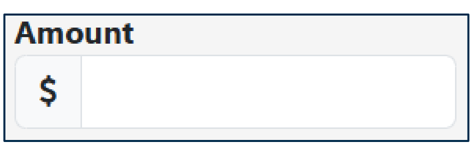
Insider Tip

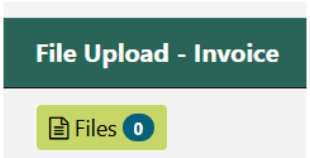
Review the Allocation and Claims Comparison Tables located at the bottom of the screen to view budget and claims amounts. The Remaining Salaries Available to Claim must equal $0.00 before this page can be submitted.

Allocation and Claims Comparison Table - Salaries

Salaries Summary	Amount
Total **Salaries** budget	$72,975.00
Salaries from file	$6,500.00
Amount of **Salaries** Previously Claimed	$0.00
Amount of **Salaries** Available to claim	$6,500.00
Sum of **Salaries** Entered above	$6,500.00
Remaining **Salaries** to claim this period	$0.00
Remaining **Salaries** to claim in a future period	$66,475.00

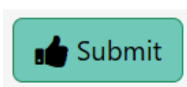
Claims Detail Page: Supplies & Materials

Step	Action
1	Select the Program Type in the dropdown box for the Supplies and Materials reported for this claims period. 
2	Enter the Vendor name. 
3	Enter the Supply/Material Purchased. 
4	Enter the Description of Use. 
5	Enter the Amount. 
6	Click Add Row. 

<table>
<tr><td>7</td><td>Click Files to select a copy of the invoice.

</td></tr>
<tr><td>8</td><td>Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file.

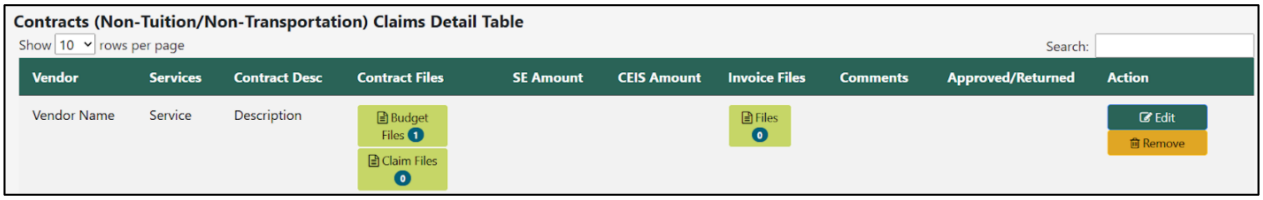
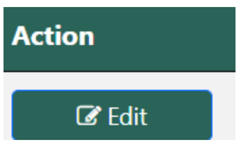
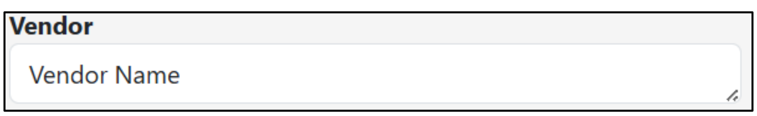
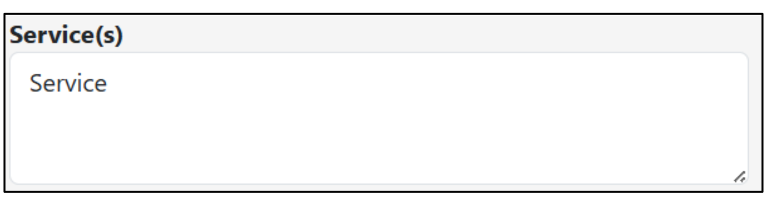
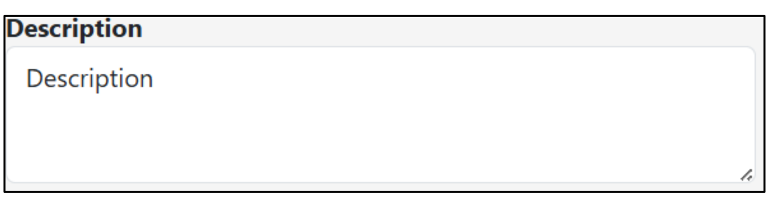
</td></tr>
<tr><td>9</td><td>Click Upload to upload the file.

</td></tr>
<tr><td>10</td><td>Click Close to return to the Supplies & Materials page.

</td></tr>
<tr><td>11</td><td>After all Supplies & Materials have been added for the claims period, click Submit to finish.


Insider Tip
Review the Allocation and Claims Comparison Tables located at the bottom of the screen to view budget and claims amounts. The “Remaining Supplies & Materials to claim this period” must equal $0.00 before this page can be submitted.
Allocation and Claims Comparison Table - Supplies & Materials
<table>
<tr><th>Supplies & Materials Summary</th><th>SE</th><th>CEIS</th><th>Total</th></tr>
<tr><td>Total Supplies & Materials budget</td><td>$5,000.00</td><td>$0.00</td><td>$5,000.00</td></tr>
<tr><td>Supplies & Materials from file</td><td>$500.00</td><td>$0.00</td><td>$500.00</td></tr>
<tr><td>Amount of Supplies & Materials Previously Claimed</td><td>$0.00</td><td>$0.00</td><td>$0.00</td></tr>
<tr><td>Amount of Supplies & Materials Available to claim</td><td>$500.00</td><td>$0.00</td><td>$500.00</td></tr>
<tr><td>Sum of Supplies & Materials Entered above</td><td>$500.00</td><td>$0.00</td><td>$500.00</td></tr>
<tr><td>Remaining Supplies & Materials to claim this period</td><td>$0.00</td><td>$0.00</td><td>$0.00</td></tr>
<tr><td>Remaining Supplies & Materials to claim in a future period</td><td>$4,500.00</td><td>$0.00</td><td>$4,500.00</td></tr>
</table></td></tr>
</table>

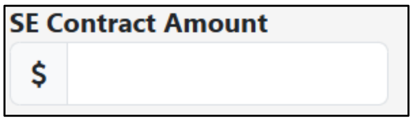
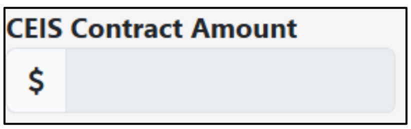
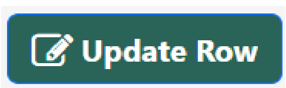
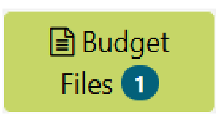
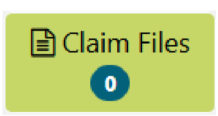
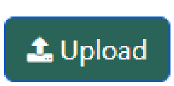
Claims Detail Page: Contracts

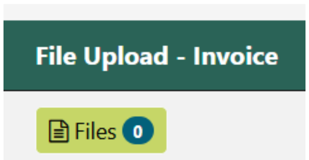
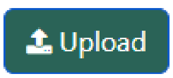
Step	Action
1	View the Contracts (Non-Tuition/Non-Transportation) Claims Detail Table which will be pre-populated from the approved Budget. 
2	Click Edit in the Action Column to provide the required additional information for the approved Contract.  **Insider Tip** If Part B funds were used for a Contract that is different from the contracts identified in the approved budget, remove the row and continue to step 3.
3	Edit/Enter Vendor (if applicable). 
4	Edit/Enter Service(s) (if applicable). 
5	Edit/Enter Description (if applicable). 

Contracts (Non-Tuition/Non-Transportation) Claims Detail Table

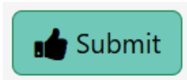
Show 10 rows per page — Search:

Vendor	Services	Contract Desc	Contract Files	SE Amount	CEIS Amount	Invoice Files	Comments	Approved/Returned	Action
Vendor Name	Service	Description	Budget Files 1 Claim Files 0			Files 0			Edit Remove

6	Enter Comments (if applicable). 
7	Enter SE Contract Amount. 
8	Enter CEIS Contract Amount (if applicable). 
9	Click Update Row. 
10	The contract file uploaded in the approved budget can be viewed by clicking Budget Files. 
11	Click Claim Files to upload an updated contract (if applicable). 
12	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 
13	Click Upload to upload the file. 

14	Click Close to return to the Contracts page. 
15	Click Files to select a copy of the invoice. 
16	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 
17	Click Upload to upload the file. 
18	Click Close to return to the Contracts page. 

19 After all Contracts have been added for the claims period, click Submit to finish.



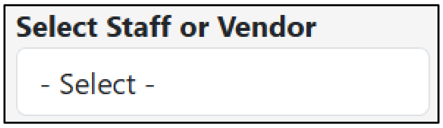
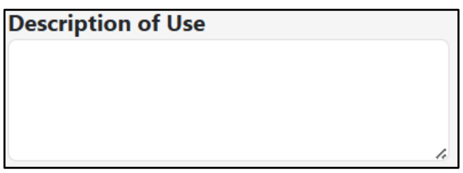
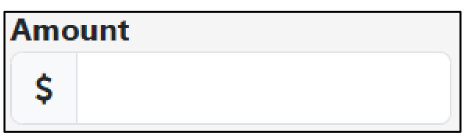
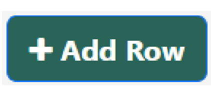
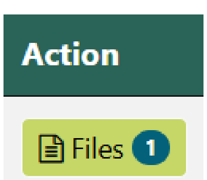
Insider Tip

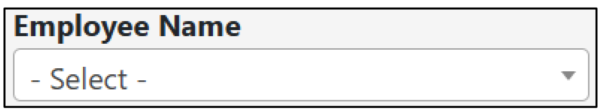
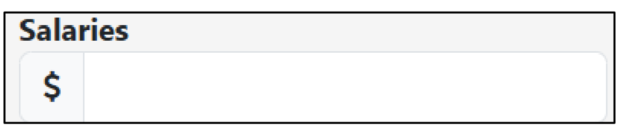
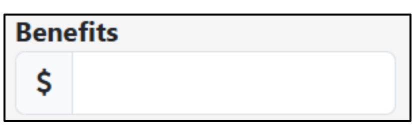
Review the Allocation and Claims Comparison Tables located at the bottom of the screen to view budget and claims amounts. The “Remaining Contracts to claim this period” must equal $0.00 before this page can be submitted.

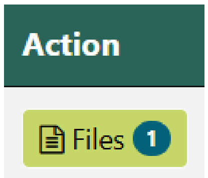
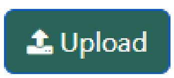
Allocation and Claims Comparison Table - Contracts (Non-Tuition/Non Transportation)

Contracts Summary	SE	CEIS	Total
Total **Contracts** budget	$2,500.00	$0.00	$2,500.00
Contracts from file	$500.00	$0.00	$500.00
Amount of **Contracts** Previously Claimed	$0.00	$0.00	$0.00
Amount of **Contracts** Available to claim	$500.00	$0.00	$500.00
Sum of **Contracts** Entered above	$500.00	$0.00	$500.00
Remaining **Contracts** to claim this period	$0.00	$0.00	$0.00
Remaining **Contracts** to claim in a future period	$2,000.00	$0.00	$2,000.00

Claims Detail Page: Pupil Transportation

Step	Action
1	Select the Staff or Vendor in the dropdown box for the Pupil Transportation reported for this claims period.  If selecting Staff, skip to Step 11. If selecting Vendor, continue to Step 2.
2	Enter Vendor Name. 
3	Enter Description of Use. 
4	Enter Amount. 
5	Click Add Row. 
6	Click Files to select a copy of the invoice. 

7	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 
8	Click Upload to upload the file. 
9	Click Close to return to the Pupil Transportation page. 
10	Skip to Step 20 if the district has no Pupil Transportation staff information to report.
11	Select the Employee Name in the dropdown box that has salaries, benefits, and/or travel reported for this claims period.  **Insider Tip** The dropdown box will display the employees listed on the Staff Assignment page. If corrections are needed, navigate back to the Staff Assignment page to update the information.
12	Enter Salaries (if applicable). 
13	Enter Benefits (if applicable). 
14	Enter Travel (if applicable). 

15	Click Add Row. 
16	Click Files to select a copy of the invoice. 
17	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file. 
18	Click Upload to upload the file. 
19	Click Close to return to the Pupil Transportation page. 

20 After all Pupil Transportation costs have been added for the claims period, click Submit to finish.

Submit

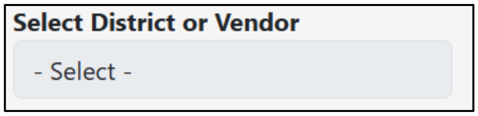
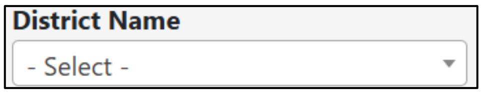
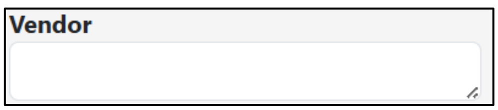
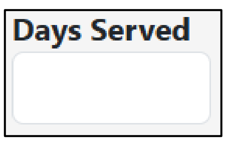
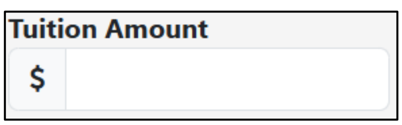
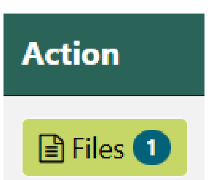
Insider Tip

Review the Allocation and Claims Comparison Tables located at the bottom of the screen to view budget and claims amounts. The “Remaining Pupil Transportation to claim this period” must equal $0.00 before this page can be submitted.

Allocation and Claims Comparison Table - Pupil Transportation

Summary	Amount
Total **Pupil Transportation** budget	$3,000.00
Total **Pupil Transportation** in .csv Upload File	$500.00
Amount of **Pupil Transportation** Previously Claimed	$0.00
Amount of **Pupil Transportation** Available to claim	$500.00
Sum of **Pupil Transportation** - Salary/Benefit/Travel Claim entered above	$0.00
Sum of **Pupil Transportation** - Contract Claim entered above	$500.00
Sum of **Pupil Transportation** Claim entered above	$500.00
Remaining **Pupil Transportation** to claim this period	$0.00
Remaining **Pupil Transportation** to claim in a future period	$2,500.00

Claims Detail: Tuition

Step	Action
1	Select District or Vendor in the dropdown box for the Tuition reported for this claims period. 
2	If District Name is selected, click on the district providing the services in the dropdown box.  If Vendor is selected, enter the Vendor. 
3	Enter Days Served. 
4	Enter Tuition Amount. 
5	Click Add Row. 
6	Click Files to select a copy of the invoice. 
7	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file.

<table>
<tr><td></td><td>Choose Files Part B ...ad.pdf</td></tr>
<tr><td>8</td><td>Click Upload to upload the file.
Upload</td></tr>
<tr><td>9</td><td>Click Close to return to the Tuition page.
Close</td></tr>
<tr><td>10</td><td>After all Tuition costs has been added for the claims period, click Submit to finish.
Submit

Insider Tip
Review the Allocation and Claims Comparison Table located at the bottom of the screen to view budget and claims amounts. The “Remaining Tuition to claim this period” must equal $0.00 before this page can be submitted.

Allocation and Claims Comparison Table - Tuition
<table>
<tr><th>Tuition Summary</th><th>Total</th></tr>
<tr><td>Total Tuition budget</td><td>$12,230.00</td></tr>
<tr><td>Tuition from file</td><td>$1,000.00</td></tr>
<tr><td>Amount of Tuition Previously Claimed</td><td>$0.00</td></tr>
<tr><td>Amount of Tuition Available to claim</td><td>$1,000.00</td></tr>
<tr><td>Sum of Tuition Entered above</td><td>$1,000.00</td></tr>
<tr><td>Remaining Tuition to claim this period</td><td>$0.00</td></tr>
<tr><td>Remaining Tuition to claim in a future period</td><td>$11,230.00</td></tr>
</table></td></tr>
</table>

Claims Detail: CEIS

Step	Action

1	Define the Population being served with CCEIS or CEIS funds as described below.
	
	Population
	
	CCEIS:
	• A district may use funds reserved for CCEIS to serve children from age 3 through grade 12, particularly, but not exclusively, children in those groups that were significantly overidentified including:
	  ○ Children who are not currently identified as needing special education or related services, but who need additional academic and behavioral support to succeed in a general education environment; and
	  ○ Children with disabilities. [34 C.F.R § 300.646(d)(2)]
	• A district may not limit the provision of CCEIS under this paragraph to children with disabilities. [34 C.F.R § 300.646(d)(3)]
	• When defining the population, the definition must be stated in terms of academic and behavioral characteristics and should be linked to the root cause or contributing factors of the disproportionality. A precise description of the targeted population will ensure accurate, manageable reporting, and appropriate use of funds.
	
	CEIS:
	• Voluntary CEIS may be provided to children without a disability in grades K–12, with a particular emphasis on students in kindergarten through grade three. When defining the population, the definition must be stated in terms of academic and behavioral characteristics. A precise description of the targeted population will ensure accurate, manageable reporting, and appropriate use of funds.
	• Students benefiting from voluntary CEIS must not be students who currently have an IEP.

2	Provide a description of the selected evidence-based academic or behavioral Intervention to be used directly or indirectly with students in the targeted group. **Intervention**

3	If supporting Direct Services, the information below is needed regarding the district employees who will be delivering the services and paid with CEIS funds. • District employee name and title or position. The same information is necessary if a contracted employee is providing the services rather than a district employee. • Description of what the employee is paid to do. • An estimated FTE of the staff person's time and dollar amount being devoted to CEIS. • A timeline of activities for the direct services being provided. • Specifically how the district's Time and Effort Policy is used to track time and effort for this FTE. **Direct Service**
4	Describe how staff delivering the interventions will be trained in the Staff Development to Personnel Delivering Direct Services box, which is aimed at improving the skills necessary to deliver the chosen interventions. Include who will provide the training, who will be trained, and the timeline for the training to be conducted. If district employees will be used to conduct the training, include the position or title and FTE of the district employee's time being devoted to and paid for with CEIS Part B funds. **Staff Development to Personnel Delivering Direct Services**
5	Provide a description of the Evaluation process that will be used to determine the effectiveness of this project. Identify data that will be gathered to assess the remediation/improvement of the academic achievement or behavioral characteristics of the population defined in this budget. **Evaluation**
6	Enter the CEIS Amount for this intervention. **CEIS Amount** $ 0

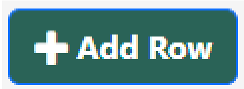
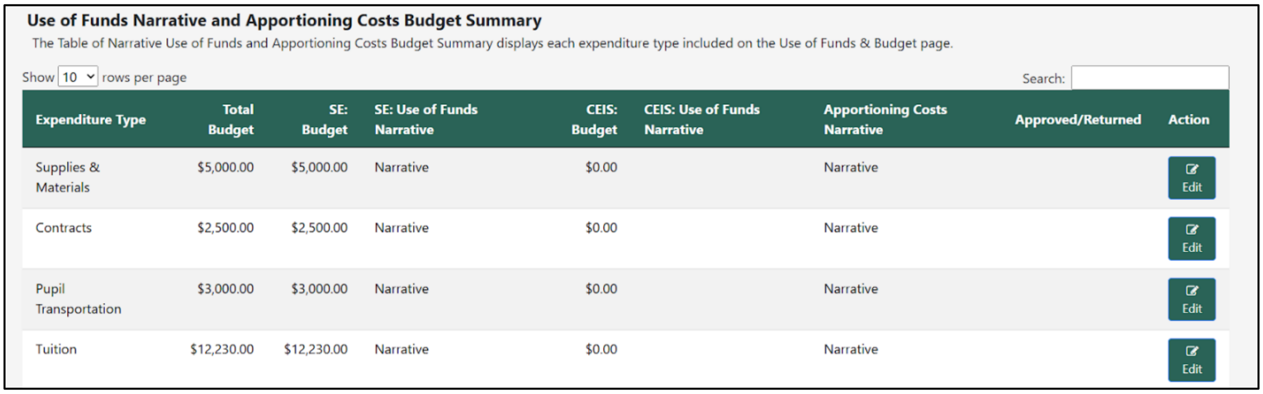
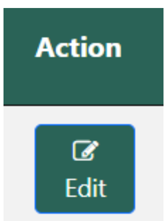
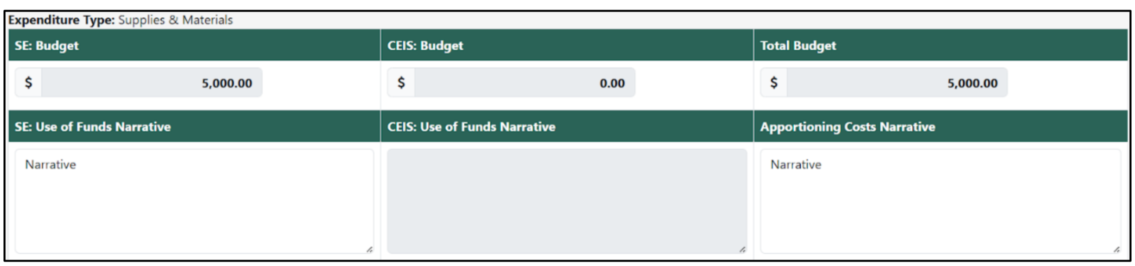
7	Click on Add Row. 
8	Once detailed rows have been added for all Interventions, click Submit to finish.  **Insider Tip** Review the Table of CEIS Summary Table located at the bottom of the screen to view budget and claims amounts. The “Remaining CEIS to claim this period” must equal $0.00 before this page can be submitted.

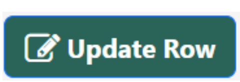
Table of CEIS Summary

CEIS Summary	Amount
Total **CEIS** budget	$26,226.00
CEIS from file	$13,750.00
Amount of **CEIS** Previously Claimed	$0.00
Amount of **CEIS** Available to claim	$13,750.00
Sum of **CEIS** Entered above	$13,750.00
Remaining **CEIS** to claim this period	$0.00
Remaining **CEIS** to claim in a future period	$12,476.00

Claims Summary

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The Use of Funds Narrative and Apportioning Costs Narrative will be pre-populated with the narratives provided in the approved budget.

Use of Funds Narrative and Apportioning Costs Budget Summary
The Table of Narrative Use of Funds and Apportioning Costs Budget Summary displays each expenditure type included on the Use of Funds & Budget page.
Show 10 rows per page Search:
<table>
<tr><th>Expenditure Type</th><th>Total Budget</th><th>SE: Budget</th><th>SE: Use of Funds Narrative</th><th>CEIS: Budget</th><th>CEIS: Use of Funds Narrative</th><th>Apportioning Costs Narrative</th><th>Approved/Returned</th><th>Action</th></tr>
<tr><td>Supplies & Materials</td><td>$5,000.00</td><td>$5,000.00</td><td>Narrative</td><td>$0.00</td><td></td><td>Narrative</td><td></td><td>Edit</td></tr>
<tr><td>Contracts</td><td>$2,500.00</td><td>$2,500.00</td><td>Narrative</td><td>$0.00</td><td></td><td>Narrative</td><td></td><td>Edit</td></tr>
<tr><td>Pupil Transportation</td><td>$3,000.00</td><td>$3,000.00</td><td>Narrative</td><td>$0.00</td><td></td><td>Narrative</td><td></td><td>Edit</td></tr>
<tr><td>Tuition</td><td>$12,230.00</td><td>$12,230.00</td><td>Narrative</td><td>$0.00</td><td></td><td>Narrative</td><td></td><td>Edit</td></tr>
</table>
</td></tr>
<tr><td>2</td><td>Click Edit in the Action column to update the narrative for any Expenditure Type (if applicable).


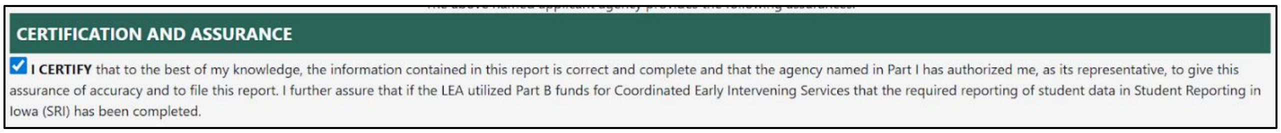
</td></tr>
<tr><td>3</td><td>Enter the updates for the selected Expenditure Type.


</td></tr>
<tr><td>4</td><td>Click Update Row.


</td></tr>
<tr><td>5</td><td>When all Expenditure Types have been reviewed and/or updated, click Submit to finish.


</td></tr>
</table>

Assurances and Certification

Step	Action
1	Review the Certification and Assurance Statement and click the check box to agree. 
2	Enter the Authorized Official’s Title. 
3	Click Certify to finish.  **Insider Tip** Clicking the Certify button will submit the budget to the Department for review. The budget remains available to the district 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.