

# IDEA PBC Application Part B LEA Claims



April 23, 2026

# IDEA PBC Application Webinar: Claims



## Facilitators

**Special Education –  
Central Division:**  
Leisa Breitfelder,  
Division Administrator

**Bureau of School  
Business Operations:**  
Dr. Kassandra Cline,  
Bureau Chief

Sarah Sheeder,  
Consultant, Special  
Education Fiscal  
Monitoring

## Purpose

- Fiscal Monitoring Requirements
- Capture pre-audit documentation
- Ensure appropriate use of funds and proper account coding



## Agenda

- Accessing the IDEA PBC Application
- Lessons Learned – Budget Submission
- Timeline
- Claims Submission
- Resources





# Purpose of Application



- Report from Office of Special Education Programs (OSEP)
- Changes to fiscal monitoring practices
- Inspiration for application



# Accessing the Application

- Iowa Education Portal ([EdPortal](#))
- Access Granted:
  - Superintendents
  - SBOs
- Other Users:
  - Request Access through the EdPortal

## Steps to Request Access:

1. Log into EdPortal.
2. Click My Profile (upper right-hand corner).



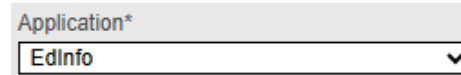
3. Click Edit.



4. Click Request Role(s).



5. Select EdInfo in the Application drop-down.



6. Select IDEA PBC in the Sub-Application Drop Down.



7. Select appropriate user role in the Role(s) Drop Down.



8. District's Security Officer approves access.



## Lessons Learned: Budget Submissions

- Time & Effort Policy
- Detail Page Submission
- Assurances



### Time & Effort Policy

- Existing Federal Requirement
- Business Procedures, Process or Policy (Budget)
- Employee Documentation (Claims)

### Detail Pages Submission

- Added rows are auto-saved.
- All required pages must be in Submitted status.
- Changes can be made to any page before certification.
- Submitting pages does not Certify the entire budget.

### Assurances

- Not listed on the Screen Status page.
- Must agree to assurances in order to Certify.
- No changes can be made after certification.



# IDEA PBC Application Timeline

**Anticipated Question:** Is the district required to submit a claim in both Claims Period 1 and Claims Period 2?

**Answer:** No. If funds are fully expended during Claims Period 1, no claim will be required for Claims Period 2.

**Anticipated Question:** Does the .csv accounting file upload have to be within the same dates as the claim period?

**Answer:** No. The .csv accounting file will reflect expenditures from July 1 to either the claim date or another date determined by the district (e.g., date of file pull).



Item	Date
Budgets Open	Done
Budgets Due	Done
Claims Period 1 Open	April 23
Claims Period 1 Due	May 15
Claims Period 2 Open	June 15
Claims Period 2 Due	July 15



# Claims Process

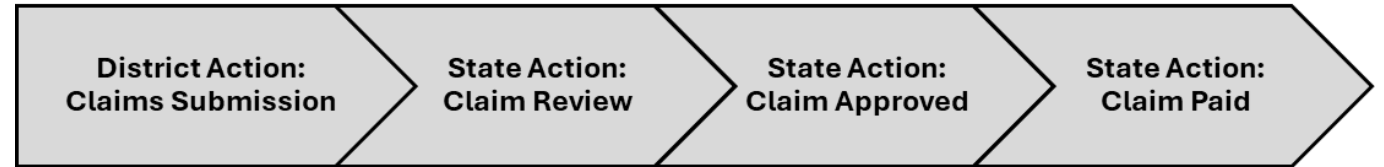


Department of Education



# Overview: Claims Process

- Upload .csv accounting file.
- IDEA Part B (Project 4521) expenditures are reviewed.
- Coding errors will be identified.
  - Ineligible expenditures
  - Eligible expenditures not included in original budget
- Enter or upload supporting documentation.





# Landing Page

**Purpose:** Access the budget detail or the claims detail.

The screenshot shows the landing page for the IDEA PBC application. At the top, there is a navigation bar with the Iowa Department of Education logo, the text "IDEA PBC Individuals with Disabilities Education Act Parts B & C", and user information "Sarah Sheerer" with "EXIT" and "LOGOUT" links. Below this is a secondary navigation bar with "Home" and "Contact" links, and a "Year" dropdown menu set to "2025-2026".

The main content area contains a paragraph explaining the application: "The IDEA PBC application is the main fiscal subrecipient monitoring tool for subrecipients of IDEA Part B and C funds. The application will be used by districts and AEAs to complete the IDEA Part B and C application and to submit claims against the approved budget. A district or AEA must have an approved budget for a claims period to become available."

There are two main sections: "Budget Tracker" and "Claims Tracker".

- Budget Tracker:** The Budget Tracker reflects the status of the budget application. It features a horizontal bar with six status buttons: "Not Started", "In Progress", "Submitted", "Department Review", "Budget Returned", and "Budget Approved".
- Claims Tracker:** The Claims Tracker reflects the status of the claims application. It features a horizontal bar with six status buttons: "Not Started", "In Progress", "Submitted", "Department Review", "Claims Returned", and "Claims Approved".

At the bottom, there are two columns for data entry:

- Budget:** A section with a "Click to enter budget." prompt and a "Budget" button.
- Claims:** A section with a "\$ Claims" header, a "Click to enter claims." prompt, a "Claims Period" dropdown menu (set to "Select"), and a "Claims" button.

## Welcome Sarah Sheeder

The IDEA PBC application is the main fiscal subrecipient monitoring tool for subrecipients of IDEA Part B and C funds. The application will be used by districts and AEAs to complete the IDEA Part B and C application and to submit claims against the approved budget. A district or AEA must have an approved budget for a claims period to become available.

### Budget Tracker

The Budget Tracker reflects the status of the budget application.

- Not Started
- In Progress
- Submitted
- Department Review
- Budget Returned
- Budget Approved

### Claims Tracker

The Claims Tracker reflects the status of the claims application.

- Not Started
- In Progress
- Submitted
- Department Review
- Claims Returned
- Claims Approved

### Budget

Click to enter budget.

Budget

### \$ Claims

Click to enter claims.

Claims Period

- Select -
- Period 1 - 04/23/2026 - 05/15/2026
- Period 2 - 06/15/2026 - 07/15/2026



The Claims Tracker will update once the Claims Period is selected.



# Claims Detail Page: General Info

**Purpose:** Displays contact information entered in the approved budget.

- Superintendent
- Project Contact
- School Business Official

The screenshot displays the 'IDEA PBC' (Individuals with Disabilities Education Act Parts B & C) claims detail page. The page is titled 'LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)' and includes a navigation menu with options like 'Screen Status', 'General Info', 'File Upload', 'Staff Assignment', 'Salaries, Benefits, & Travel', 'Supplies & Materials', 'Contracts', 'Pupil Transportation', 'Tuition', 'CEIS', 'Claims Summary', and 'Assurances'. The 'General Info' section is active, showing details for the applicant agency, project contact, school business official, and project duration.

A. Applicant Agency		B. Project Contact	
Name of Administrator	Josh Porter	Name of Contact	Branwyn Greathouse
Name of Agency	Fort Dodge Comm School District	Contact Title	Director of Special Educa
Street Address	109 N 25th St	Contact Telephone	(515) 574-5640
City and Zip Code	Fort Dodge, Iowa 50501	Contact Email	bgreathouse@fdschools.org
Area Code-number-Ext	(515) 576-1161		
Administrator Email	jporter@fdschools.org		

C. School Business Official (SBO)		D. Project Duration	
Name	Brandon Hansel	FROM	07/01/2025 TO 06/30/2026
Email	bhansel@fdschools.org	CFDA#	84.027 IDEA Part B
Phone Number	(515) 574-5644	Source:	4521
		Project:	4521

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

- Screen Status »
- General Info »**
- File Upload »
- Staff Assignment »
- Salaries, Benefits, & Travel »
- Supplies & Materials »
- Contracts »
- Pupil Transportation »
- Tuition »
- CEIS »
- Claims Summary »
- Assurances

Review information in Section A. Applicant Agency. If the information is incorrect, please update the School Information Update application in the Education Portal. Input contact information in Section B. Project Contact. Review information in Section C. School Business Official (SBO). If the information needs to be updated, check Change SBO box and enter the updated information. Click Submit to finish.

**A. Applicant Agency**

Name of Administrator ⓘ Josh Porter  
 Name of Agency Fort Dodge Comm School District  
 Street Address 109 N 25th St  
 City and Zip Code Fort Dodge, Iowa 50501  
 Area Code-number-Ext (515) 576-1161  
 Administrator Email jporter@fdschools.org

**B. Project Contact**

Name of Contact Branwyn Greathouse  
 Contact Title Director of Special Educa  
 Contact Telephone (515) 574-5640  
 Contact Email bgreathouse@fdschools.org

**C. School Business Official (SBO)**

Change SBO

Name Brandon Hansel  
 Email ⓘ bhansel@fdschools.org  
 Phone Number (515) 574-5644

**D. Project Duration**

FROM 07/01/2025 TO 06/30/2026

CFDA# 84.027 IDEA Part B  
 Source: 4521  
 Project: 4521



# Claims Detail Page: Screen Status

**Purpose:** Identify the claim pages that are Required for Certification and display the status of each page.

**Tip:** *Just like the Screen Status page from the budget:* This page will update as the required claims pages are submitted.

The screenshot shows the Iowa Department of Education IDEA PBC interface. The page title is 'LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)'. The navigation menu includes 'Screen Status', 'General Info', 'File Upload', 'Staff Assignment', 'Salaries, Benefits, & Travel', 'Supplies & Materials', 'Contracts', 'Pupil Transportation', 'Tuition', 'CEIS', 'Claims Summary', and 'Assurances'. The 'Screen Status' page provides a status overview of the claims detail pages. The table below shows the status of each 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		

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

<b>Screen Status</b> »	<b>General Info</b> »	<b>File Upload</b> »	<b>Staff Assignment</b> »	<b>Salaries, Benefits, &amp; Travel</b> »	<b>Supplies &amp; Materials</b> »	<b>Contracts</b> »	<b>Pupil Transportation</b> »	<b>Tuition</b> »	<b>CEIS</b> »	<b>Claims Summary</b> »	<b>Assurances</b>
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The Screen Status page provides a status overview of the claims detail pages in this application. First, complete the Claims Submission detail page. Then the Salaries, Benefits, & Travel; Supplies & Materials; Contracts; Pupil Transportation; Tuition; and Coordinated Early Intervening Services (CEIS) claims detail pages will be required based on the information entered on the Claims Submission detail page and as noted in the Required for Certification column below. The claims submission will be certified on the Assurances page when all other pages are completed.

**Required for all:**

- General Info
- File Upload
- Claims Summary

**Requirements for other pages are driven by claim detail.**

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		



# Claims Detail Page: File Upload

**Purpose:** Test the .csv accounting file against the approved budget to determine allowable expenditures.

- **Fund** = 10
- **Facility** = 00##\*, Defined by SIU\*\*, 9###
- **Program** = 211-219, 234-239, 241-249
- **Project** = 4521



Expenditure Type	Function Codes	Object Codes
Salaries	1###	1##
Benefits	1###	2##
Travel	1### 2213 2219	58#
Supplies / Materials	1###	61# 64# 65#
Contracts	1### 2213 2219	32#, 33# 361-362 371-372 381-382 738, 739
Pupil Transportation	27###	1##, 2## 348-349 355-359 361-362 371-372 381-382 51#, 58#
Tuition	1###	561-562 567-569



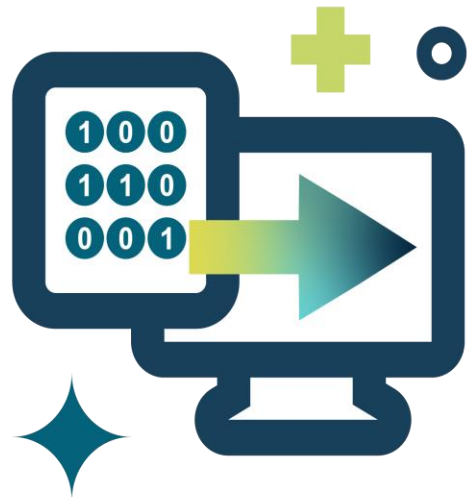
## Allowable Uses Table

**Anticipated Question:** Should the .csv accounting file include costs for payments already made by the Department in December?

**Answer: YES.** For each claim period, the .csv accounting file must include all expenditures for the fiscal year.

*FY26 Logistics:* The Department will deduct the December payment when May warrants are issued.

# Claims Detail Page: File Upload



Expenditure Type	Function Codes	Object Codes
Salaries	1###	1##
Benefits	1###	2##
Travel	1### 2213 2219	58#
Supplies / Materials	1###	61# 64# 65#
Contracts	1### 2213 2219	32#, 33# 361-362 371-372 381-382 738, 739
Pupil Transportation	27###	1##, 2## 348-349 355-359 361-362 371-372 381-382 51#, 58#
Tuition	1###	561-562 567-569



**Anticipated Question:** How should I code tuition to ensure it is recorded in the SES correctly?

**Answer:** Tuition should be coded to object code 56X.

**Tip:** The student can be added manually to the SES on Screen 1.

# Claims Detail Page: File Upload

**Step 1:** Upload .csv file from accounting software program.

**Step 2:** Review and correct coding errors.

**Step 3:** Review and correct budget mismatch errors.

The screenshot displays the IDEA PBC web interface. At the top, the Iowa Department of Education logo is visible, along with the user name 'Sarah Sheeder' and the year '2025-2026'. The navigation menu includes 'Home', 'Contact', and various claim categories like 'LEA Claims', 'Screen Status', 'General Info', 'File Upload', etc. The 'File Upload' section is highlighted with a blue border. It contains instructions for uploading a .csv file, a 'Choose File' button, and a 'Validations' dropdown menu. Below this, a table titled 'Table of Claims Submissions' shows the breakdown of budget and upload amounts for various expenditure types. A second table, 'Claims File Upload Summary', provides a detailed view of the budget and claimed amounts across different claim periods.

Expenditure Type	Amount: Approved Budget	Amount: .csv File Upload	Error Messages
Salaries (Instructional)	\$72,975.00	\$6,500.00	
Employee Benefits	\$13,181.00	\$900.00	
Employee Travel	\$0.00		
Supplies & Materials (Consumables)	\$1,000.00	\$100.00	
Contracts (Non-Tuition, Non-Transportation)	\$2,000.00	\$600.00	
Pupil Transportation	\$3,000.00	\$950.00	
Tuition	\$5,000.00	\$2,500.00	

Expenditure Type	Budget	Claim Period 1	Claim Period 2	Claim Period 3	Total Claimed	Remaining Balance
Salaries (Instructional)	\$72,975.00	\$6,500.00			\$6,500.00	\$66,475.00
Employee Benefits	\$13,181.00	\$900.00			\$900.00	\$12,281.00
Employee Travel	\$0.00				\$0.00	\$0.00
Supplies & Materials (Consumables)	\$1,000.00	\$100.00			\$100.00	\$900.00
Contracts (Non-Tuition, Non-Transportation)	\$2,000.00	\$600.00			\$600.00	\$1,400.00
Pupil Transportation	\$3,000.00	\$950.00			\$950.00	\$2,050.00
Tuition	\$5,000.00	\$2,500.00			\$2,500.00	\$2,500.00
<b>Total</b>	<b>\$97,156.00</b>	<b>\$11,550.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$11,550.00</b>	<b>\$85,606.00</b>

LEA Claims (Period 1 - 04/15/2026 - 04/30/2026)

[Screen Status >>](#)
[General Info >>](#)
[File Upload >>](#)
[Staff Assignment >>](#)
[Salaries, Benefits, & Travel >>](#)
[Supplies & Materials >>](#)
[Contracts >>](#)
[Pupil Transportation >>](#)
[Tuition >>](#)
[CEIS >>](#)
[Claims Summary >>](#)
[Assurances](#)

### Claims Submission

Guidance for Federal Awards (2 CFR 200.430) requires charges to Federal awards must be based on records that accurately reflect the work performed.

**Step 1:** Upload a .csv file from the district's accounting program.

**Step 2:** Review the error messages (if any) displayed in the table below. Correct any errors in the district's accounting program and then upload an updated .csv file.

**Choose File** No file chosen

File upload type must be .csv.

Each file upload will overwrite prior uploaded file.

Comments

3200/3200

**Upload**

**Validations**

- File upload includes following function code(s) (2143) that are not appropriate to IDEA Part B Funds.
- Object Code 618 is not allowed with Function Code 2143.

### Table of File Upload Results

Expenditure Type	Amount: Approved Budget	Amount: .csv File Upload	Error Messages
Salaries (Instructional)	\$16,562.47	\$2,500.00	
Employee Benefits	\$2,830.53	\$1,000.00	
Employee Travel	\$0.00		
Supplies & Materials (Consumables)	\$0.00		
Contracts (Non-Tuition, Non-Transportation)	\$0.00	\$1,050.00	File upload includes costs for an allowable cost to IDEA funds but were not included in the original budget.
Pupil Transportation	\$0.00		
Tuition	\$0.00		
<b>Total</b>	<b>\$19,393.00</b>	<b>\$4,550.00</b>	

### Claims File Upload Summary

The table below is populated from information on the Use of Funds & Budget page and the Table of Claims Submissions above. If information in the table below should be modified, update the original source data.

Expenditure Type	Budget	Claim Period 1	Claim Period 2	Claim Period 3	Total Claimed	Remaining Balance
Salaries (Instructional)	\$16,562.47				\$0.00	\$16,562.47
Employee Benefits	\$2,830.53				\$0.00	\$2,830.53
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	\$0.00				\$0.00	\$0.00
<b>Total</b>	<b>\$19,393.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$19,393.00</b>

# Claims Detail Page: File Upload - CEIS

Districts with CEIS expenditures in the approved budget must click on the CEIS Split button to identify the amount of SE vs CEIS expenditures in the .csv accounting file upload.

Click on "CEIS Split" button to enter split values for CEIS portion [CEIS Split](#)

CEIS Split - Claims Submission

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

Save



# Claims Detail Page: Screen Status

- Updated based on .csv accounting file detail.
- Will update if a new .csv accounting file is uploaded.

The screenshot shows the IDEA PBC web application interface. The header includes the IOWA Department of Education logo and the IDEA PBC title. The user is logged in as Sarah Sheeder. The main navigation menu includes Home, Contact, and a Year selector set to 2025-2026. The current page is titled "LEA Claims (Period 1 - 04/15/2026 - 04/30/2026)". The "Screen Status" section is active, showing a table of completion status for various claim categories.

Claims Page	Required For Certification	Started	Started Date	Submitted	Submitted Date	Updated By
General Information	Yes	No		No		
File Upload	Yes	Yes	04/13/2026 11:58:30 AM	Yes	04/13/2026 12:10:17 PM	
Staff Assignment	Yes	No		No		
Salaries, Benefits, & Travel	Yes	No		No		
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		

**LEA Claims** (Period 1 - 04/15/2026 - 04/30/2026)

<a href="#">Screen Status &gt;&gt;</a>	<a href="#">General Info &gt;&gt;</a>	<a href="#">File Upload &gt;&gt;</a>	<a href="#">Staff Assignment &gt;&gt;</a>	<a href="#">Salaries, Benefits, &amp; Travel &gt;&gt;</a>	<a href="#">Supplies &amp; Materials &gt;&gt;</a>	<a href="#">Contracts &gt;&gt;</a>	<a href="#">Pupil Transportation &gt;&gt;</a>	<a href="#">Tuition &gt;&gt;</a>	<a href="#">CEIS &gt;&gt;</a>	<a href="#">Claims Summary &gt;&gt;</a>	<a href="#">Assurances</a>
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The Screen Status page provides a status overview of the claims detail pages in this application. First, complete the Claims Submission detail page. Then the Salaries, Benefits, & Travel; Supplies & Materials; Contracts; Pupil Transportation; Tuition; and Coordinated Early Intervening Services (CEIS) claims detail pages will be required based on the information entered on the Claims Submission detail page and as noted in the Required for Certification column below. The claims submission will be certified on the Assurances page when all other pages are completed.

Claims Page	Required For Certification	Started	Started Date	Submitted	Submitted Date	Updated By
General Information	Yes	No		No		
File Upload	Yes	Yes	04/13/2026 11:58:30 AM	Yes	04/13/2026 12:10:17 PM	
Staff Assignment	Yes	No		No		
Salaries, Benefits, & Travel	Yes	No		No		
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		



# Claims Detail Page: Staff Assignment

**Purpose:** Used to collect detail information for employees whose salaries and/or benefits are paid for using IDEA Part B funds.

## Required Uploads:

- Staff Assignment

The screenshot shows the 'Staff Assignment' page in the IDEA PBC system. The page header includes the Iowa Department of Education logo and navigation links. The main content area is titled 'LEA Claims (Period 1 - 04/15/2026 - 04/30/2026)' and features a navigation menu with options like 'Screen Status', 'General Info', 'File Upload', 'Staff Assignment', 'Salaries, Benefits, & Travel', 'Supplies & Materials', 'Contracts', 'Pupil Transportation', 'Tuition', 'CEIS', 'Claims Summary', and 'Assurances'. The 'Staff Assignment' section is active, displaying instructions for populating the table, a file upload interface with a 'Choose File' button and an 'Upload' button, and a manual entry form with fields for Employee First Name, Employee Last Name, BOEE Folder Number, FTE of Related Work, Position Title, Description of Work, and Expenditure Type (SE, CEIS, Transportation). An '+ Add Row' button is located at the bottom right of the manual entry form.

## Anticipated Question:

How will this information be used?

**Answer:** Staff will be prepopulated in claims detail pages based on the identification of whether costs for these staff include special education, CEIS, and/or transportation.

LEA Claims (Period 1 - 04/15/2026 - 04/30/2026)

Screen Status >>	General Info >>	File Upload >>	<b>Staff Assignment &gt;&gt;</b>	Salaries, Benefits, & Travel >>	Supplies & Materials >>	Contracts >>	Pupil Transportation >>	Tuition >>	CEIS >>	Claims Summary >>	Assurances
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Staff Assignment

Instructions: The Staff Assioment table can be populated by either manually entering information (through Add Row function) or by uploading a file. Follow the steps below to complete the page.

Steps to Download and Upload a .csv File.

Choose File No file chosen

File upload type must be .csv.

Each file upload will overwrite prior uploaded file.

Upload

Steps to Enter Manually.

Employee First Name	Employee Last Name	BOEE Folder Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
FTE of Related Work	Position Title	Description of Work
<input type="text" value="0.00"/>	<input type="text" value="Select"/>	<input type="text"/>
Expenditure Type: SE	Expenditure Type: CEIS	Expenditure Type: Transportation
<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>

+ Add Row

## Steps to Download and Upload a .csv File.

**Step 1:** Download the **Staff Assignment Template** to review the required column headings and detail that is required for each employee that is paid using IDEA Part B funds. All columns are required except for Employee Number.

- Note 1: The Description of Work is a summary of the employee's job responsibilities. Please limit the description to 50 characters and do not include punctuation in the description.
- Note 2: If costs for the employee should only be claimed on the Salaries, Benefits, & Travel page, enter "Yes" in the "Expenditure Type: SE" for Special Education Instruction or "Yes" in the "Expenditure Type: CEIS" for CEIS.
- Note 3: If costs for the employee should be claimed in the Pupil Transportation page, enter "Yes" for Expenditure Type: SE" and "Yes" for "Expenditure Type: Transportation".

**Step 2:** Once all employees have been added, save the template as a .csv file and upload the updated template.

**Step 3:** Review the information populated in the table for accuracy and upload the staff assignment (File Upload - Staff Assignment) for each employee listed.

## Steps to Enter Manually.

**Step 1:** Manually enter the requested information for each employee that is paid using IDEA Part B funds. All columns are required except for Employee Number.

- Note 1: The Description of Work is a summary of the employee's job responsibilities. Please limit the description to 50 characters and do not include punctuation in the description.
- Note 2: If costs for the employee should only be claimed on the Salaries, Benefits, & Travel page, enter "Yes" in the "Expenditure Type: SE" for Special Education Instruction or "Yes" in the "Expenditure Type: CEIS" for CEIS.
- Note 3: If costs for the employee should be claimed in the Pupil Transportation page, enter "Yes" for Expenditure Type: SE" and "Yes" for "Expenditure Type: Transportation".

**Step 2:** Upload the staff assignment (File Upload - Staff Assignment) for each employee listed.

Employee First Name

Employee Last Name

BOEE Folder Number

FTE of Related Work

Position Title

Description of Work

50/50

Expenditure Type: SE

Expenditure Type: CEIS

Expenditure Type: Transportation

+ Add Row

## Staff Assignment Detail

Show  rows per page

Search:

Employee First Name	Employee Last Name	FTE of Related Work	Position Title	Description of Work	Expenditure Type - SE	Expenditure Type - CEIS	Expenditure Type - Transportation	BOEE Folder Number	Approved/Returned	Action
David	Jones	0.5	Driver	Special Education	Yes	No	Yes			<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files</a> 1
Linda	Johnson	0.5	Teacher	Special Education	Yes	No	No	556407		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files</a> 1
Sally	Moore	1	Paraprofessional	Special Education	Yes	No	No	789101		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files</a> 1
John	Smith	0.25	Teacher	Special Education						<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files</a> 1

### Anticipated Question:

What documentation is required for a staff assignment?

### Answer:

Locally determined, but must specify SE detail

Ex. Teachers: Contract (if specific) class schedule

Ex. Para: Daily schedule or assignment





# Claims Detail Page: Salaries, Benefits, & Travel

**Purpose:** Used to collect detail for the related amount, if any, claimed for Salaries, Benefits, & Travel on the Claim Submission page.

## Required Uploads:

- Time & Effort Documentation
- Travel:
  - Invoice or Receipt
  - Reimbursement Request



LEA Claims (Period 1 - 04/15/2026 - 04/30/2026)

Salaries, Benefits, & Travel

**Instructions:** Select an employee from the Employee Name list and enter the following information in the table below as applicable to this claim: Salary amount (SE Salaries), Benefits amount (SE Benefits), Travel amount (SE Travel), a file upload of the time and effort documentation (Files), and documentation for the travel costs (Files) as reported on the .csv upload. Travel cost documentation should include the purpose of the travel, explanation of the costs incurred, and documentation proving the allowability of the costs (e.g., reimbursement request with invoice or mileage documentation with district approval). The costs displayed in the table should reflect the amount reported in the .csv file and approved.

Employee Name:

SE Salaries: \$

SE Benefits: \$

SE Travel: \$

**Salaries, Benefits & Travel Claims Detail**

Show 10 rows per page

Employee Name	SE Salaries	SE Benefits	SE Travel	Total	Approved/Returned	Action
John Smith 123456	\$1,500.00	\$150.00	\$0.00	\$1,650.00		<input type="button" value="Files"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/>
Linda Johnson 556407	\$5,000.00	\$750.00	\$0.00	\$5,750.00		<input type="button" value="Files"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/>
<b>Totals</b>	<b>\$6,500.00</b>	<b>\$900.00</b>	<b>\$0.00</b>	<b>\$7,400.00</b>		

## Anticipated Question:

What is required for Time & Effort documentation?

## Answer:

The requirements for Time & Effort should be consistent with the requirements listed in [2 CFR. § 200.430\(g\)](#)

**Tip:** If it is new to you, ask a colleague for a copy of their process.

LEA Claims (Period 1 - 04/15/2026 - 04/30/2026)

- Screen Status »
- General Info »
- File Upload »
- Staff Assignment »
- Salaries, Benefits, & Travel »**
- Supplies & Materials »
- Contracts »
- Pupil Transportation »
- Tuition »
- CEIS »
- Claims Summary »
- Assurances

Salaries, Benefits, & Travel

**Instructions:** Select an employee from the Employee Name list and enter the following information in the table below as applicable to this claim: Salary amount (SE Salaries), Benefits amount (SE Benefits), Travel amount (SE Travel), a file upload of the time and effort documentation (Files), and documentation for the travel costs (Files) as reported on the .csv upload. Travel cost documentation should include the purpose of the travel, explanation of the costs incurred, and documentation proving the allowability of the costs (e.g., reimbursement request with invoice or mileage documentation with district approval). The costs displayed in the table should reflect the amount reported in the .csv file upload less any amount previously claimed/approved.

Employee Name

SE Salaries  SE Benefits  SE Travel  [+ Add Row](#)

Salaries, Benefits & Travel Claims Detail

Show  rows per page

Search:

Employee Name	SE Salaries	SE Benefits	SE Travel	Total	Approved/Returned	Action
John Smith 123456	\$1,500.00	\$150.00	\$0.00	\$1,650.00		<a href="#" style="background-color: #c6e0b4; padding: 2px 5px;">Files 1</a> <a href="#" style="background-color: #004a7c; color: white; padding: 2px 5px;">Edit</a> <a href="#" style="background-color: #ffc000; padding: 2px 5px;">Remove</a>
Linda Johnson 556407	\$5,000.00	\$750.00	\$0.00	\$5,750.00		<a href="#" style="background-color: #c6e0b4; padding: 2px 5px;">Files 1</a> <a href="#" style="background-color: #004a7c; color: white; padding: 2px 5px;">Edit</a> <a href="#" style="background-color: #ffc000; padding: 2px 5px;">Remove</a>
<b>Totals</b>	<b>\$6,500.00</b>	<b>\$900.00</b>	<b>\$0.00</b>	<b>\$7,400.00</b>		

### Allocation and Claims Comparison Table - Salaries

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

### Allocation and Claims Comparison Table - Benefits

Benefits Summary	Amount
Total <b>Benefits</b> budget	\$13,181.00
<b>Benefits</b> from file	\$900.00
Amount of <b>Benefits</b> Previously Claimed	\$0.00
Amount of <b>Benefits</b> Available to claim	\$900.00
Sum of <b>Benefits</b> Entered above	\$900.00
Remaining <b>Benefits</b> to claim this period	\$0.00
Remaining <b>Benefits</b> to claim in a future period	\$12,281.00

### Allocation and Claims Comparison Table - Travel

Travel Summary	Amount
Total <b>Travel</b> budget	\$0.00
<b>Travel</b> from file	\$0.00
Amount of <b>Travel</b> Previously Claimed	\$0.00
Amount of <b>Travel</b> Available to claim	\$0.00
Sum of <b>Travel</b> Entered above	\$0.00
Remaining <b>Travel</b> to claim this period	\$0.00
Remaining <b>Travel</b> to claim in a future period	\$0.00



# Claims Detail Page: Supplies & Materials

**Purpose:** Used to collect the detail for the related amount, if any, claimed for supplies on the Claim Submission page.

## Required Uploads:

- Invoice

The screenshot shows the Iowa Department of Education IDEA PBC Claims Detail Page for Supplies & Materials. The page includes a navigation menu with options like Screen Status, General Info, File Upload, Staff Assignment, Salaries, Benefits, & Travel, Supplies & Materials (selected), Contracts, Pupil Transportation, Tuition, CEIS, Claims Summary, and Assurances. The main content area contains a form for entering claim details, including Program Type, Vendor, Supply/Material Purchased, Description of Use, and Amount. Below the form is a table titled "Supplies & Materials Claims Detail - Special Education" which currently shows "No data available in table". At the bottom, there is an "Allocation and Claims Comparison Table - Supplies & Materials" summarizing budget and claimed amounts.

**Supplies & Materials Claims Detail - Special Education**

Vendor	Supply/Material Purchased	Description of Use in SE Program	Amount	File Upload - Invoice	Approved/Returned	Action
No data available in table						
<b>Totals</b>			<b>\$0.00</b>			

Showing 0 to 0 of 0 entries

**Allocation and Claims Comparison Table - Supplies & Materials**

Supplies & Materials Summary	SE	CEIS	Total
Total <b>Supplies &amp; Materials</b> budget	\$1,000.00	\$0.00	\$1,000.00
<b>Supplies &amp; Materials</b> from file	\$100.00	\$0.00	\$100.00
Amount of <b>Supplies &amp; Materials</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Supplies &amp; Materials</b> Available to claim	\$100.00	\$0.00	\$100.00
Sum of <b>Supplies &amp; Materials</b> Entered above	\$0.00	\$0.00	\$0.00
Remaining <b>Supplies &amp; Materials</b> to claim this period	\$100.00	\$0.00	\$100.00
Remaining <b>Supplies &amp; Materials</b> to claim in a future period	\$900.00	\$0.00	\$900.00

**LEA Claims** (Period 1 - 04/23/2026 - 05/15/2026)

- [Screen Status »](#)
- [General Info »](#)
- [File Upload »](#)
- [Staff Assignment »](#)
- [Salaries, Benefits, & Travel »](#)
- [Supplies & Materials »](#)
- [Contracts »](#)
- [Pupil Transportation »](#)
- [Tuition »](#)
- [CEIS »](#)
- [Claims Summary »](#)
- [Assurances](#)

**Supplies & Materials**

**Instructions:** Select the Program Type, then enter Vendor (Vendor), the supply/material (Supply/Material Purchased), a description of the how the supplies/materials were used to support the SE program (Description of Use), the amount of the supplies/material (Amount) and upload of the invoice for the supplies/materials (Files). The costs displayed in the table should reflect the amount reported in the .csv file upload less any amount previously claimed/approved.

<b>Program Type</b> <input type="text" value="Select"/>	<b>Vendor</b> <input type="text" value="60/60"/>
<b>Supply/Material Purchased</b> <input type="text" value="3200/3200"/>	<b>Description of Use</b> <input type="text" value="3200/3200"/>
<b>Amount</b> <input type="text" value="\$"/> <a href="#" style="background-color: #004a99; color: white; padding: 2px 5px; border-radius: 3px;">+ Add Row</a>	

**Supplies & Materials Claims Detail - Special Education**

 Show  rows per page

 Search: 

Vendor	Supply/Material Purchased	Description of Use in SE Program	Amount	File Upload - Invoice	Approved/Returned	Action
School Specialty	Supplies necessary to implement goals of student I. <a href="#">Read all</a>	Student IEP reading goals.	\$100.00	<a href="#">Files 1</a>		<a href="#">Edit</a> <a href="#">Remove</a>
<b>Totals</b>			<b>\$100.00</b>			

Showing 1 to 1 of 1 entries

[First](#) [Previous](#)  [Next](#) [Last](#)
**Allocation and Claims Comparison Table - Supplies & Materials**

Supplies & Materials Summary	SE	CEIS	Total
Total <b>Supplies &amp; Materials</b> budget	\$1,000.00	\$0.00	\$1,000.00
<b>Supplies &amp; Materials</b> from file	\$100.00	\$0.00	\$100.00
Amount of <b>Supplies &amp; Materials</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Supplies &amp; Materials</b> Available to claim	\$100.00	\$0.00	\$100.00
Sum of <b>Supplies &amp; Materials</b> Entered above	\$100.00	\$0.00	\$100.00
Remaining <b>Supplies &amp; Materials</b> to claim this period	\$0.00	\$0.00	\$0.00
Remaining <b>Supplies &amp; Materials</b> to claim in a future period	\$900.00	\$0.00	\$900.00



# Claims Detail Page: Contracts

**Purpose:** Used to collect the detail for the related amount, if any, claimed for contracts on the Claim Submission page.



Contract uploaded in the approved budget will be included on this page.

## Required Uploads:

- Updated Contract (if applicable)
- Invoice

**IOWA** Department of Education **IDEA PBC** Individuals with Disabilities Education Act Parts B & C

Home Contact Year 2025-2026

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

Screen Status » General Info » File Upload » Staff Assignment » Salaries, Benefits, & Travel » Supplies & Materials » **Contracts »** Pupil Transportation » Tuition » CEIS » Claims Summary » Assurances

Contracts (Non-Tuition, Non-Transportation)

**Instructions:** The Contracts (Non-Tuition/Non-Transportation) Claims Detail Table below includes the Contracts detail information from the approved Budget. Select Edit next to the item(s) included in this claims period and enter/edit a description of the contracted service (Service(s)), a description of the contract (Contract Description), additional comments (Comments), and the amount of the purchase (Contract Amount). In the table, upload the contract between the school and the vendor if different from the original contract provided (Contract Files) and upload of the invoice for the contracted services (Invoice Files). If the Contract being claimed was not included in the approved Budget, manually enter the required information.

Vendor: 60/60 Service(s): 3200/3200

Description: 3200/3200 Comments: 3200/3200

SE Contract Amount: \$ CEIS Contract Amount: \$ **+ Add Row**

**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
AEA	PD	PD	Budget Files 1 Claim Files 0	\$600.00	\$0.00	Files 0			Edit Remove
<b>Totals</b>				<b>\$600.00</b>	<b>\$0.00</b>				

Showing 1 to 1 of 1 entries First Previous 1 Next Last

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

Contracts Summary	SE	CEIS	Total
Total <b>Contracts</b> budget	\$2,000.00	\$0.00	\$2,000.00
<b>Contracts</b> from file	\$600.00	\$0.00	\$600.00
Amount of <b>Contracts</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Contracts</b> Available to claim	\$600.00	\$0.00	\$600.00
Sum of <b>Contracts</b> Entered above	\$600.00	\$0.00	\$600.00
Remaining <b>Contracts</b> to claim this period	\$0.00	\$0.00	\$0.00
Remaining <b>Contracts</b> to claim in a future period	\$1,400.00	\$0.00	\$1,400.00

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

- Screen Status »
- General Info »
- File Upload »
- Staff Assignment »
- Salaries, Benefits, & Travel »
- Supplies & Materials »
- Contracts »
- Pupil Transportation »
- Tuition »
- CEIS »
- Claims Summary »
- Assurances

Contracts (Non-Tuition, Non-Transportation)

**Instructions:** The Contracts (Non-Tuition/Non-Transportation) Claims Detail Table below includes the Contracts detail information from the approved Budget. Select Edit next to the item(s) included in this claims period and enter/edit a description of the contracted service (Service(s)), a description of the contract (Contract Description), additional comments (Comments), and the amount of the purchase (Contract Amount). In the table, upload the contract between the school and the vendor if different from the original contract provided (Contract Files) and upload of the invoice for the contracted services (Invoice Files). If the Contract being claimed was not included in the approved Budget, manually enter the required information.

<b>Vendor</b>	<b>Service(s)</b>
<input type="text" value="60/60"/>	<input type="text" value="3200/3200"/>
<b>Description</b>	<b>Comments</b>
<input type="text" value="3200/3200"/>	<input type="text" value="3200/3200"/>
<b>SE Contract Amount</b>	<b>CEIS Contract Amount</b>
\$ <input type="text"/>	\$ <input type="text"/>
<a href="#">+ Add Row</a>	

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
AEA	PD	PD	<div style="border: 1px solid #00bcd4; padding: 2px; display: inline-block;">  Budget Files 1                 </div> <div style="border: 1px solid #00bcd4; padding: 2px; display: inline-block;">  Claim Files 0                 </div>	\$600.00	\$0.00	<div style="border: 1px solid #00bcd4; padding: 2px; display: inline-block;">  Files 0                 </div>			<div style="border: 1px solid #00bcd4; padding: 2px; display: inline-block; background-color: #2e7d32; color: white; margin-bottom: 2px;"> <a href="#">Edit</a> </div> <div style="border: 1px solid #00bcd4; padding: 2px; display: inline-block; background-color: #ffc107; color: white;"> <a href="#">Remove</a> </div>
<b>Totals</b>				<b>\$600.00</b>	<b>\$0.00</b>				

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

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

Contracts Summary	SE	CEIS	Total
Total <b>Contracts</b> budget	\$2,000.00	\$0.00	\$2,000.00
<b>Contracts</b> from file	\$600.00	\$0.00	\$600.00
Amount of <b>Contracts</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Contracts</b> Available to claim	\$600.00	\$0.00	\$600.00
Sum of <b>Contracts</b> Entered above	\$600.00	\$0.00	\$600.00
Remaining <b>Contracts</b> to claim this period	\$0.00	\$0.00	\$0.00
Remaining <b>Contracts</b> to claim in a future period	\$1,400.00	\$0.00	\$1,400.00



# Claims Detail Page: Pupil Transportation

**Purpose:** Used to collect the detail for the related amount, if any, claimed for pupil transportation on the Claim Submission page.

## Required Uploads: Staff:

- Time & Effort Documentation

## Vendor:

- Invoice

The screenshot shows the Iowa Department of Education IDEA PBC Claims Detail Page for Pupil Transportation. The page includes a navigation menu with options like Screen Status, General Info, File Upload, Staff Assignment, Salaries, Benefits, & Travel, Supplies & Materials, Contracts, Pupil Transportation (selected), Tuition, CEIS, Claims Summary, and Assurances. The main content area is titled 'Pupil Transportation' and contains instructions for selecting Staff or Vendor. Below this, there are two tables: 'Pupil Transportation - Staff Claims Detail' and 'Pupil Transportation - Vendor Claims Detail'. Both tables show a total amount of \$0.00. At the bottom, there is an 'Allocation and Claims Comparison Table - Pupil Transportation' which provides a summary of budget and claims data.

Employee Name	Salaries	Benefits	Travel	Total	Approved/Returned	Action
No data available in table						
<b>Totals</b>	\$0.00	\$0.00	\$0.00	\$0.00		

Vendor Name	Description of Use	Amount	Approved/Returned	Action
No data available in table				
<b>Totals</b>		\$0.00		

Summary	Amount
Total Pupil Transportation budget	\$3,000.00
Total Pupil Transportation in .csv Upload File	\$950.00
Amount of Pupil Transportation Previously Claimed	\$0.00
Amount of Pupil Transportation Available to claim	\$950.00
Sum of Pupil Transportation - Salary/Benefit/Travel Claim entered above	\$0.00
Sum of Pupil Transportation - Contract Claim entered above	\$0.00
Sum of Pupil Transportation Claim entered above	\$0.00
Remaining Pupil Transportation to claim this period	\$950.00
Remaining Pupil Transportation to claim in a future period	\$2,050.00

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

- Screen Status »
- General Info »
- File Upload »
- Staff Assignment »
- Salaries, Benefits, & Travel »
- Supplies & Materials »
- Contracts »
- Pupil Transportation »
- Tuition »
- CEIS »
- Claims Summary »
- Assurances

Pupil Transportation

**Instructions:** In the dropdown box, select Staff if the expenditures being claimed are for staff Salaries, Benefits, & Travel; or select Vendor if the expenditures being claimed are for contracted services.

Select Staff or Vendor

- Select -

Pupil Transportation - Staff Claims Detail

Show 10 rows per page

Search:

Employee Name	Salaries	Benefits	Travel	Total	Approved/Returned	Action
No data available in table						
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		

Showing 0 to 0 of 0 entries

First Previous Next Last

Pupil Transportation - Vendor Claims Detail

Show 10 rows per page

Search:

Vendor Name	Description of Use	Amount	Approved/Returned	Action
Transportation Vendor	Description of Use	\$950.00		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 1</a>
<b>Totals</b>		<b>\$950.00</b>		

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Allocation and Claims Comparison Table - Pupil Transportation

Summary	Amount
Total <b>Pupil Transportation</b> budget	\$3,000.00
Total <b>Pupil Transportation</b> in .csv Upload File	\$950.00
Amount of <b>Pupil Transportation</b> Previously Claimed	\$0.00
Amount of <b>Pupil Transportation</b> Available to claim	\$950.00
Sum of <b>Pupil Transportation</b> - Salary/Benefit/Travel Claim entered above	\$0.00
Sum of <b>Pupil Transportation</b> - Contract Claim entered above	\$950.00
Sum of <b>Pupil Transportation</b> Claim entered above	\$950.00



# Claims Detail Page: Tuition

**Purpose:** Used to collect the detail for the related amount, if any, claimed for tuition on the Claim Submission page

## Required Uploads:

- Invoice

**IOWA** | Department of Education | **IDEA PBC** *Individuals with Disabilities Education Act Parts B & C*

Home Contact Year 2025-2026

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

Screen Status » General Info » File Upload » Staff Assignment » Salaries, Benefits, & Travel » Supplies & Materials » Contracts » Pupil Transportation » **Tuition »** CEIS » Claims Summary » Assurances

**Tuition**

**Instructions:** Identify the service provider by selecting a district or vendor (Select District or Vendor). If District is selected, use the drop-down box (District Name) to select the district providing services. If Vendor is selected, enter the name of the Vendor providing services (Vendor Name). Enter the number of days the student was served (Days Served) and the cost of the services (Amount), then click Add Row. Once the row is created, upload the invoice related to the claim amount. The total costs displayed in the Tuition Claims Detail table cannot exceed the amount available to claim (i.e., reported in the .csv file upload less any amount previously claimed/approved).

Select District or Vendor:  District Name:

Days Served:  Tuition Amount: \$

**Tuition Claims Detail Table**

Show  rows per page Search:

Tuition Type	District/Vendor	Days Served	Amount	Approved/Returned	Action
No data available in table					
<b>Totals</b>			<b>\$0.00</b>		

Showing 0 to 0 of 0 entries First Previous Next Last

**Allocation and Claims Comparison Table - Tuition**

Tuition Summary	Total
Total <b>Tuition</b> budget	\$5,000.00
<b>Tuition</b> from file	\$2,500.00
Amount of <b>Tuition</b> Previously Claimed	\$0.00
Amount of <b>Tuition</b> Available to claim	\$2,500.00
Sum of <b>Tuition</b> Entered above	\$0.00
Remaining <b>Tuition</b> to claim this period	\$2,500.00
Remaining <b>Tuition</b> to claim in a future period	\$2,500.00

**LEA Claims** (Period 1 - 04/23/2026 - 05/15/2026)

<a href="#">Screen Status »</a>	<a href="#">General Info »</a>	<a href="#">File Upload »</a>	<a href="#">Staff Assignment »</a>	<a href="#">Salaries, Benefits, &amp; Travel »</a>	<a href="#">Supplies &amp; Materials »</a>	<a href="#">Contracts »</a>	<a href="#">Pupil Transportation »</a>	<b><a href="#">Tuition »</a></b>	<a href="#">CEIS »</a>	<a href="#">Claims Summary »</a>	<a href="#">Assurances</a>
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**Tuition**

**Instructions:** Identify the service provider by selecting a district or vendor (Select District or Vendor). If District is selected, use the drop-down box (District Name) to select the district providing services. If Vendor is selected, enter the name of the Vendor providing services (Vendor Name). Enter the number of days the student was served (Days Served) and the cost of the services (Amount), then click Add Row. Once the row is created, upload the invoice related to the claim amount. The total costs displayed in the Tuition Claims Detail table cannot exceed the amount available to claim (i.e., reported in the .csv file upload less any amount previously claimed/approved).

**Select District or Vendor**

**District Name**

**Days Served**

**Tuition Amount**


**Tuition Claims Detail Table**

 Show  rows per page

 Search: 

Tuition Type	District/Vendor	Days Served	Amount	Approved/Returned	Action
District	2313 - Fort Dodge Comm School District	15	\$2,500.00		<input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Files 1"/>
<b>Totals</b>			<b>\$2,500.00</b>		

Showing 1 to 1 of 1 entries

 First Previous  Next Last

**Allocation and Claims Comparison Table - Tuition**

Tuition Summary	Total
Total <b>Tuition</b> budget	\$5,000.00
<b>Tuition</b> from file	\$2,500.00
Amount of <b>Tuition</b> Previously Claimed	\$0.00
Amount of <b>Tuition</b> Available to claim	\$2,500.00
Sum of <b>Tuition</b> Entered above	\$2,500.00
Remaining <b>Tuition</b> to claim this period	\$0.00
Remaining <b>Tuition</b> to claim in a future period	\$2,500.00

# Claims Detail Page: CEIS

**Purpose:** Used to collect the detail for the related amount, if any, claimed for CEIS on the Claim Submission page

**IOWA** Department of Education **IDEA PBC** Individuals with Disabilities Education Act Parts B & C

Home Contact Year 2025-2026

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

Screen Status » General Info » File Upload » .. Staff Assignment » Salaries, Benefits, & Travel » Supplies & Materials » Contracts » Pupil Transportation » Tuition » **CEIS »** Claims Summary » Assurances

Coordinated Early Intervening Services (CEIS)

Populate the table below with details of the CEIS budgeted expenditures. Include the population of students who will be served (Population), the name of the specific intervention being provided (Intervention), the type of direct service being provided (Direct Service), the planned development activities that will be provided to staff who are delivering the direct services (Staff Development to Personnel Delivering Direct Services), how the effect and implementation of the service will be evaluated (Evaluation), and the cost of the intervention (Amount).

**Population**  
3200/3200

**Intervention**  
3200/3200  
Staff Development to Personnel Delivering Direct Services

**Direct Service**  
3200/3200

**Evaluation**  
3200/3200  
CEIS Amount \$  + Add Row

Population	Intervention	Direct Service	Staff Development	Evaluation	CEIS Amount	Approved/Returned	Action
No data available in table							
<b>Totals</b>					<b>\$0.00</b>		

Showing 0 to 0 of 0 entries First Previous Next Last

**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	\$0.00
Remaining CEIS to claim this period	\$13,750.00
Remaining CEIS to claim in a future period	\$12,476.00

**LEA Claims** (Period 1 - 04/23/2026 - 05/15/2026)

- [Screen Status >>](#)
- [General Info >>](#)
- [File Upload >> ..](#)
- [Staff Assignment >>](#)
- [Salaries, Benefits, & Travel >>](#)
- [Supplies & Materials >>](#)
- [Contracts >>](#)
- [Pupil Transportation >>](#)
- [Tuition >>](#)
- [CEIS >>](#)
- [Claims Summary >>](#)
- [Assurances](#)

**Coordinated Early Intervening Services (CEIS)**

Populate the table below with details of the CEIS budgeted expenditures. Include the population of students who will be served (Population), the name of the specific intervention being provided (Intervention), the type of direct service being provided (Direct Service), the planned development activities that will be provided to staff who are delivering the direct services (Staff Development to Personnel Delivering Direct Services), how the effect and implementation of the service will be evaluated (Evaluation), and the cost of the intervention (Amount).

<b>Population</b> <div style="border: 1px solid #ccc; height: 80px; margin-top: 5px;"></div> <small>3200/3200</small>	<b>Intervention</b> <div style="border: 1px solid #ccc; height: 80px; margin-top: 5px;"></div> <small>3200/3200</small>	<b>Direct Service</b> <div style="border: 1px solid #ccc; height: 80px; margin-top: 5px;"></div> <small>3200/3200</small>
<b>Evaluation</b> <div style="border: 1px solid #ccc; height: 80px; margin-top: 5px;"></div> <small>3200/3200</small>	<b>Staff Development to Personnel Delivering Direct Services</b> <div style="border: 1px solid #ccc; height: 80px; margin-top: 5px;"></div> <small>3200/3200</small>	
	<b>CEIS Amount</b> \$ <input style="width: 100px;" type="text" value="0"/> <a href="#" style="background-color: #004a99; color: white; padding: 2px 10px; border-radius: 5px;">+ Add Row</a>	

 Show  rows per page

 Search: 

Population	Intervention	Direct Service	Staff Development	Evaluation	CEIS Amount	Approved/Returned	Action
Population narrative	Intervention narrative	Direct Service narrative		Evaluation narrative	\$13,750.00		<a href="#" style="background-color: #004a99; color: white; padding: 2px 5px;">✎ Edit</a> <a href="#" style="background-color: #ffc107; color: #004a99; padding: 2px 5px;">🗑 Remove</a>
<b>Totals</b>					<b>\$13,750.00</b>		

Showing 1 to 1 of 1 entries

[First](#) [Previous](#) 1 [Next](#) [Last](#)
**Table of CEIS Summary**

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



# Claims Detail Page: Claims Summary

**Purpose:** Used to collect the narrative for Use of Funds and Apportioning Costs.



This page will pre-populated from the approved budget. Changes can be made if necessary.

IOWA Department of Education IDEA PBC Individuals with Disabilities Education Act Parts B & C

Home Contact Year 2025-2026

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

Screen Status » General Info » File Upload » Staff Assignment » Salaries, Benefits, & Travel » Supplies & Materials » Contracts » Pupil Transportation » Tuition » CEIS » **Claims Summary »** Assurances

Claims Summary

**Instructions:** The information below is pre-populated from the approved budget. Click on Edit in the Action column if updates to the Use of Funds Narrative or Apportioning Costs Narrative is needed.

**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:

Expenditure Type	Total Budget	SE: Budget	SE: Use of Funds Narrative	CEIS: Budget	CEIS: Use of Funds Narrative	Apportioning Costs Narrative	Approved/Returned	Action
Salaries	\$72,975.00	\$72,975.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Employee Benefits	\$13,181.00	\$13,181.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Supplies & Materials	\$1,000.00	\$1,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Contracts	\$2,000.00	\$2,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Pupil Transportation	\$3,000.00	\$3,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Tuition	\$5,000.00	\$5,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>

**Expenditure Type:**

SE: Budget	CEIS: Budget	Total Budget
\$	\$	\$

SE: Use of Funds Narrative	CEIS: Use of Funds Narrative	Apportioning Costs Narrative
3200/3200	3200/3200	3200/3200

**Apportioning Costs Narrative Examples**

- Example 1:** Personnel included in the budget must be substantiated by time and effort logs to document time conducting activities within the project.
- Example 2:** Transportation costs may be mileage rates applied to mileage logs retained for actual transportation related to the special education program.

**Use of Funds Narrative Examples**

**Special Education**

- Example 1:** Part B funds will be used to support 5 FTEs of special education teachers.
- Example 2:** Part B funds will be used to cover the actual cost of tuition for special education instructional services.

**CEIS**

- Example 1:** Part B funds will be used to support 5 FTEs of behavior specialists, who will coordinate the services.
- Example 2:** Part B funds will be used to cover the actual cost of specialized materials to be used in the CEIS segment of the projects.

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

- [Screen Status »](#)
- [General Info »](#)
- [File Upload »](#)
- [Staff Assignment »](#)
- [Salaries, Benefits, & Travel »](#)
- [Supplies & Materials »](#)
- [Contracts »](#)
- [Pupil Transportation »](#)
- [Tuition »](#)
- [CEIS »](#)
- [Claims Summary »](#)
- [Assurances](#)

**Claims Summary**

**Instructions:** The information below is pre-populated from the approved budget. Click on Edit in the Action column if updates to the Use of Funds Narrative or Apportioning Costs Narrative is needed.

**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  rows per page Search:

Expenditure Type	Total Budget	SE: Budget	SE: Use of Funds Narrative	CEIS: Budget	CEIS: Use of Funds Narrative	Apportioning Costs Narrative	Approved/Returned	Action
Salaries	\$72,975.00	\$72,975.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Employee Benefits	\$13,181.00	\$13,181.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Supplies & Materials	\$1,000.00	\$1,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Contracts	\$2,000.00	\$2,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Pupil Transportation	\$3,000.00	\$3,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>
Tuition	\$5,000.00	\$5,000.00	Narrative	\$0.00		Narrative		<a href="#">Edit</a>

Showing 1 to 6 of 6 entries First Previous 1 Next Last


















**Expenditure Type:**

SE: Budget	CEIS: Budget	Total Budget
<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="text" value="\$"/>
SE: Use of Funds Narrative	CEIS: Use of Funds Narrative	Apportioning Costs Narrative
<input style="height: 80px;" type="text" value="3200/3200"/>	<input style="height: 80px;" type="text" value="3200/3200"/>	<input style="height: 80px;" type="text" value="3200/3200"/>

- Apportioning Costs Narrative Examples**
- Example 1:** Personnel included in the budget must be substantiated by time and effort logs to document time conducting activities within the project.
  - Example 2:** Transportation costs may be mileage rates applied to mileage logs retained for actual transportation related to the special education program.

- Use of Funds Narrative Examples**
- Special Education**
- Example 1:** Part B funds will be used to support 5 FTEs of special education teachers.
  - Example 2:** Part B funds will be used to cover the actual cost of tuition for special education instructional services.

- CEIS**
- Example 1:** Part B funds will be used to support 5 FTEs of behavior specialists, who will coordinate the services.
  - Example 2:** Part B funds will be used to cover the actual cost of specialized materials to be used in the CEIS segment of the projects.

Claims Page	Required For Certification	Started	Started Date	Submitted	Submitted Date	Updated By
General Information	Yes	 Yes	04/10/2026 11:06:03 AM	 Yes	04/10/2026 11:06:03 AM	
File Upload	Yes	 Yes	04/10/2026 11:06:17 AM	 Yes	04/10/2026 11:13:50 AM	
Staff Assignment	Yes	 Yes	04/13/2026 09:05:14 AM	 Yes	04/13/2026 09:07:33 AM	
Salaries, Benefits, & Travel	Yes	 Yes	04/10/2026 11:16:29 AM	 Yes	04/10/2026 11:26:01 AM	
Supplies & Materials	Yes	 Yes	04/10/2026 11:26:27 AM	 Yes	04/16/2026 06:26:32 AM	
Contracts (Non-Tuition/Non-Transportation)	Yes	 Yes	04/10/2026 01:35:13 PM	 Yes	04/16/2026 06:38:19 AM	
Pupil Transportation	Yes	 Yes	04/16/2026 06:40:45 AM	 Yes	04/16/2026 07:36:11 AM	
Tuition	Yes	 Yes	04/10/2026 11:36:41 AM	 Yes	04/10/2026 11:37:06 AM	
Coordinated Early Intervening Services (CEIS)	N/A			N/A		
Claims Summary	Yes			 Yes	04/16/2026 07:36:02 AM	

**FINAL STEP:** Once all claims detail pages identified as required (i.e., YES) reflected in the Required for Certification column have been successfully submitted (i.e., YES) reflected in the Submitted column, complete the Assurances page to complete the claims submission.

# Claims Detail Page: Assurances

**Purpose:** Collects the districts assurance and allows for final claim certification.



Any of the detail claim pages can be modified until the claim is certified.

A screenshot of a web application interface for IDEA PBC. The header includes the Iowa Department of Education logo and navigation links for Home and Contact. The main content area is titled 'LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)' and features a navigation menu with options like Screen Status, General Info, File Upload, Staff Assignment, Salaries, Benefits, & Travel, Supplies & Materials, Contracts, Pupil Transportation, Tuition, CEIS, Claims Summary, and Assurances. The Assurances section contains instructions for reviewing and confirming the certification statement, followed by a 'CERTIFICATION AND ASSURANCE' section with a checkbox for certification and fields for the Authorized Official's Name (Sarah Sheeder), Title, Date (04/16/2026), and Applicant Agency (1701-Denison Comm School District). A 'CERTIFY' button is located at the bottom right.

LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

Screen Status >>	General Info >>	File Upload >>	Staff Assignment >>	Salaries, Benefits, & Travel >>	Supplies & Materials >>	Contracts >>	Pupil Transportation >>	Tuition >>	CEIS >>	Claims Summary >>	<b>Assurances</b>
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Assurances

Review and confirm the certification and assurance statement by checking the box. Enter the title of the Authorized Official (Authorized Official's Title) and then click Certify to finish the application.

AGENCY: 1701-Denison Comm School District

The above named applicant agency provides the following assurances:

CERTIFICATION AND ASSURANCE

I CERTIFY that I agree, the information contained in this report is correct and complete and that the agency named in Part I has authorized me, as its representative, to give this assurance of accuracy and to file this report. I further assure that if the LEA utilized Part B funds for Coordinated Early Intervening Services that the required reporting of student data in Student Reporting in Iowa (SRI) has been completed.

Name of Agency's Authorized Official for Applicant Agency:

Date:

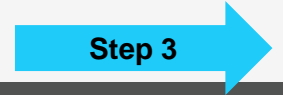
04/16/2026

Authorized Official's Title

School Business Official

Applicant Agency

1701-Denison Comm School District



LEA Claims (Period 1 - 04/23/2026 - 05/15/2026)

 **Claims is in read-only mode. No changes are allowed.**

<a href="#">Screen Status &gt;&gt;</a>	<a href="#">General Info &gt;&gt;</a>	<a href="#">File Upload &gt;&gt;</a>	<a href="#">Staff Assignment &gt;&gt;</a>	<a href="#">Salaries, Benefits, &amp; Travel &gt;&gt;</a>	<a href="#">Supplies &amp; Materials &gt;&gt;</a>	<a href="#">Contracts &gt;&gt;</a>	<a href="#">Pupil Transportation &gt;&gt;</a>	<a href="#">Tuition &gt;&gt;</a>	<a href="#">CEIS &gt;&gt;</a>	<a href="#">Claims Summary &gt;&gt;</a>	<a href="#">Assurances</a>
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The Screen Status page provides a status overview of the claims detail pages in this application. First, complete the Claims Submission detail page. Then the Salaries, Benefits, & Travel; Supplies & Materials; Contracts; Pupil Transportation; Tuition; and Coordinated Early Intervening Services (CEIS) claims detail pages will be required based on the information entered on the Claims Submission detail page and as noted in the Required for Certification column below. The claims submission will be certified on the Assurances page when all other pages are completed.

# Claims Notifications

Notifications are sent after  
Department Review



Resubmit  
returned claims  
quickly to ensure  
timely payments.



## Claim Approved

- Notification claim was approved
- Identification of approved amount
- Payment will be issued within 30 days

## Claim Returned

- Notification claim was returned
- Request to resubmit within 10 days of notification



## Next Steps

This year has a truncated timeline due to the application launch.

Beginning in 2026-2027, a regular cadence will be established.



**May 15**

Claims Period 1 Certification Deadline

**June 15**

Claims Period 2 Open

**July 15**


Claims Period 2 Certification Deadline



# Resources

## LEA: IDEA PBC Resources

[IDEA PBC Budget \(Part B\) User Instructions \(1.16 MB\) .pdf](#)

[IDEA PBC Budget \(Part B\) Webinar](#)  - Recorded 2-10-26. Provides LEAS with an introduction to IDEA PBC Application for Part B funds.

[IDEA PBC Budget \(Part B\) Webinar PowerPoint \(2-10-26\) \(5.02 MB\) .pdf](#)



Special Education Finance web page:  
[IDEA PBC Instructions](#)



Special Education Finance web page:  
[C/CEIS Instructions](#)



App: [SpecialEducationFinance@iowa.gov](mailto:SpecialEducationFinance@iowa.gov)  
Part B Program: [John.Lee@iowa.gov](mailto:John.Lee@iowa.gov)  
C/CEIS Program: [Nancy.Hunt@iowa.gov](mailto:Nancy.Hunt@iowa.gov)



# Questions



Department of Education