

# IDEA PBC Application Part C and Birth to 3 AEA Claims



May 5, 2026

# IDEA PBC Application Webinar: Claims



## Facilitators

### **Special Education – Central Division:**

Leisa Breitfelder  
Division Administrator

### **Bureau of School Business Operations:**

Dr. Cassandra Cline  
Bureau Chief

Sarah Sheeder  
Education Program Consultant

### **Bureau of Early Childhood:**

Dr. Kimberly Villotti  
Bureau Chief

Celeste Mortvedt  
Administrative Consultant

## Purpose

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



## Agenda

- Accessing the IDEA PBC Application
- Timeline
- Claims Submission
- Resources





# Purpose of Application



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

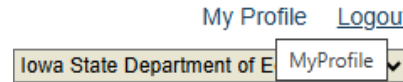


# Accessing the Application

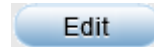
- Iowa Education Portal ([EdPortal](#))
- Access Granted:
  - Chief
  - SBOs
  - Early Access Liaison
  - Special Education Administrator
- Other Users:
  - Request access through the EdPortal

## Steps to Request Access:

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



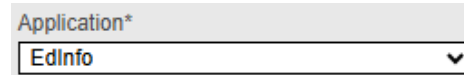
3. Click Edit.



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. AEA's Security Officer approves access.



# IDEA PBC Application Timeline

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

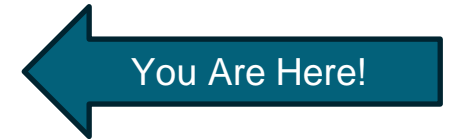
**Answer:** No. If funds are fully expended during Claims Period 1, no claim will be required for Claims Period 2.

**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 AEA (e.g., date of file pull).



Item	Date
Budgets Open	April 21
Budgets Due	May 5
Claims Period 1 Open	May 5
Claims Period 1 Due	May 15
Claims Period 2 Open	June 15
Claims Period 2 Due	July 15



# Claims Process

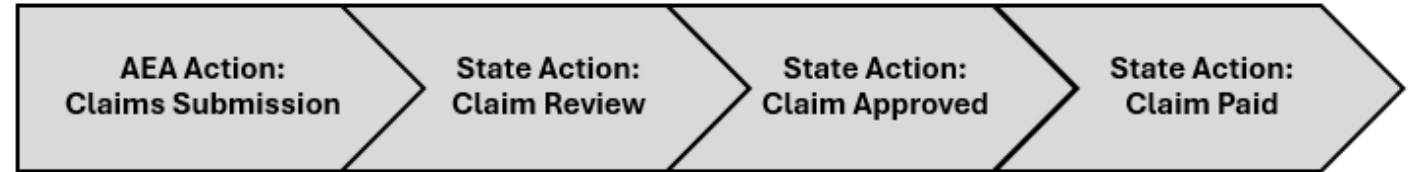


Department of Education



# Overview: Claims Process

- Upload .csv accounting file.
- IDEA Part C & Birth to 3 (Project 4523 & 3322) 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.
- View the status of budget or claims submission.

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 and the text "IDEA PBC Individuals with Disabilities Education Act Parts B & C". 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 is titled "Welcome" and includes a brief description of the application. Below this, there are two main sections:

- Part C & Birth to 3 Budget Tracker**: This section includes a progress bar with five stages: "Not Started", "In Progress", "Submitted", "Department Review", and "Budget Returned", followed by a "Budget Approved" button.
- Part C & Birth to 3 Claims Tracker**: This section includes a progress bar with five stages: "Not Started", "In Progress", "Submitted", "Department Review", and "Claims Returned", followed by a "Claims Approved" button.

At the bottom, there are two main action buttons: "Budget" and "Claims". The "Budget" button is labeled "Click to enter the budget." and the "Claims" button is labeled "Click to enter claims." with a "Claims Period" dropdown menu set to "- Select -".

# Welcome

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.

## Part C & Birth to 3 Budget Tracker

The Budget Tracker reflects the status of the AEA budget application.

Not Started
  In Progress
  Submitted
  Department Review
  Budget Returned
  Budget Approved

## Part C & Birth to 3 Claims Tracker

The Claims Tracker reflects the status of the AEA claims application.

Not Started
  In Progress
  Submitted
  Department Review
  Claims Returned
  Claims Approved

**Budget**

Click to enter the budget.

Budget

**Claims**

Click to enter claims.

Claims Period

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



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



# General Info

**Purpose:** Displays contact information for the roles below.

- A. Administrator
- B. Early Access Liaison
- C. School Business Official
- D. Project Duration
- E. Special Education Administrator

The screenshot shows the IDEA PBC web application interface. At the top, there is a navigation bar with the Iowa Department of Education logo and the text "IDEA PBC Individuals with Disabilities Education Act Parts B & C". Below the navigation bar, there are links for "Home" and "Contact", and a "Year" dropdown menu set to "2025-2026". The main content area is titled "Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)". There are several tabs: "Screen Status", "General Info", "File Upload", "Staff Assignment", "Salaries, Benefits, & Travel", "Supplies & Materials", "Contracts", "Claims Summary", and "Assurances". Below the tabs, there is a paragraph of instructions: "Review information in Section A. Applicant Agency. If the information is incorrect, please update the School Information Update application in the Education Portal. Review contact information in Section B. Early Access Liaison, Section C. School Business Official (SBO), and Section E. Special Education Administrator. If changes are needed in Section B, or Section E., enter the updated information. If changes are needed to Section C, check the Change SBO box and enter the updated information. Click Submit to finish." The form is divided into five sections: A. Applicant Agency, B. Early Access Liaison, C. School Business Official (SBO), D. Project Duration, and E. Special Education Administrator. Each section contains input fields for contact information.

A. Applicant Agency		B. Early Access Liaison	
Name of Administrator	Susie Meade	Name of Liaison	Jess Burger
Name of Agency	Grant Wood AEA	Liaison Title	
Street Address	4401 6th St SW	Liaison Telephone	(319) 399-6574
City and Zip Code	Cedar Rapids, Iowa 52404	Liaison Email	jburger@gwaea.org
Area Code-number-Ext	(319) 399-6700		
Administrator Email	smeade@gwaea.org		

C. School Business Official (SBO)		D. Project Duration	
Name	Barbara Harms	FROM	07/01/2025 TO 06/30/2026
Email	bharms@gwaea.org	CFDA #	84.181 Part C, IDEA
Phone Number	(319) 399-6704	Source:	4523
		Project:	4523
		State Funds, Early Access	
		Source:	3322
		Project:	3322

E. Special Education Administrator	
Name of SE Administrator	Melissa Ford
SE Administrator Title	
SE Administrator Telephone	(319) 399-6458
SE Administrator Email	mford@gwaea.org

**Claims: Part C & Birth to 3** (Period 1 - 05/05/2026 - 05/15/2026)

- [Screen Status »](#)
- [General Info »](#)
- [File Upload »](#)
- [Staff Assignment »](#)
- [Salaries, Benefits, & Travel »](#)
- [Supplies & Materials »](#)
- [Contracts »](#)
- [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. Review contact information in Section B. Early Access Liaison, Section C. School Business Official (SBO), and Section E. Special Education Administrator. If changes are needed in Section B. or Section E., enter the updated information. If changes are needed to Section C, check the Change SBO box and enter the updated information. Click Submit to finish.

**A. Applicant Agency**

Name of Administrator ⓘ	Susie Meade
Name of Agency	Grant Wood AEA
Street Address	4401 6th St SW
City and Zip Code	Cedar Rapids, Iowa 52404
Area Code-number-Ext	(319) 399-6700
Administrator Email	smeade@gwaea.org

**B. Early Access Liaison**

Name of Liaison	<input type="text" value="Jess Burger"/>
Liaison Title	<input type="text"/>
Liaison Telephone	<input type="text" value="(319) 399-6574"/>
Liaison Email	<input type="text" value="jburger@gwaea.org"/>

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

Change SBO

Name	<input type="text" value="Barbara Harms"/>
Email	<input type="text" value="bharms@gwaea.org"/>
Phone Number	<input type="text" value="(319) 399-6704"/>

**D. Project Duration**

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

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CFDA # 84.181 Part C, IDEA  
 Source: 4523  
 Project: 4523  
 State Funds, Early Access  
 Source: 3322  
 Project: 3322

**E. Special Education Administrator**

Name of SE Administrator	<input type="text" value="Melissa Ford"/>
SE Administrator Title	<input type="text"/>
SE Administrator Telephone	<input type="text" value="(319) 399-6458"/>
SE Administrator Email	<input type="text" value="mford@gwaea.org"/>



# Screen Status

**Purpose:** Identifies claim pages Required for Certification and displays 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.

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

Home | Contact | Year 2025-2026

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

Screen Status >> | General Info >> | File Upload >> | Staff Assignment >> | Salaries, Benefits, & Travel >> | Supplies & Materials >> | Contracts >> | Claims Summary >> | Assurances

The Screen Status page provides a status overview of the claims detail pages in this application. First, complete the File Upload detail page. Then the Salaries, Benefits, & Travel; Supplies & Materials; Contracts claims detail pages will be required based on the information entered on the File Upload 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	No		No		
Staff Assignment	N/A	No		No		
Salaries, Benefits, & Travel	N/A	N/A		N/A		
Supplies & Materials	N/A	N/A		N/A		
Contracts	N/A	N/A		N/A		
Claims Summary	Yes			No		

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

<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="#">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 File Upload detail page. Then the Salaries, Benefits, & Travel; Supplies & Materials; Contracts claims detail pages will be required based on the information entered on the File Upload 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	No		No		
Staff Assignment	N/A	N/A		N/A		
Salaries, Benefits, & Travel	N/A	N/A		N/A		
Supplies & Materials	N/A	N/A		N/A		
Contracts	N/A	N/A		N/A		
Claims Summary	Yes			No		

**Required for all:**

- General Info
- File Upload
- Claims Summary
- Assurances

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



# File Upload

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

- **Fund** = 10
- **Program** = 224 - 229
- **Project** =
  - 4523 (Part C) &
  - 3322 (Birth to 3)

## Allowable Uses Table

Expenditure Type	Function Codes	Object Codes
Salaries	1###, 21##, 22##, 24##	1##
Benefits	1###, 21##, 22##, 24##	2##
Travel	1###, 21##, 22##, 24##	58#
Supplies / Materials	1###, 21##, 22##, 24##	61# 65#
Contracts	1###, 21##, 22##, 24##, 27##, 2920, 2930, 2940	32# 33# 51# 59#
Indirect Costs	1###, 21##, 23##, 24##, 25##, 26##	95#

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

**Answer: YES.** For each claim period, the .csv accounting file must include all expenditures for the fiscal year: July 1 and forward.

*FY26 Logistics:* The Department will deduct previous payments when May warrants are issued.



# File Upload

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

- **Fund** = 10
- **Program** = 224 - 229
- **Project** =
  - 4523 (Part C) &
  - 3322 (Birth to 3)

## Allowable Uses Table

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Salaries	1###, 21##, 22##, 24##	1##
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Travel	1###, 21##, 22##, 24##	58#
Supplies / Materials	1###, 21##, 22##, 24##	61# 65#
Contracts	1###, 21##, 22##, 24##, 27##, 2920, 2930, 2940	32# 33# 51# 59#
Indirect Costs	1###, 21##, 23##, 24##, 25##, 26##	95#

**Anticipated Question:** What if I have a contract for indirect costs?

**Answer:** The application is not set up to direct those contract costs to the indirect costs so please wait until the next claim period to include the costs.

# 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 application interface. At the top, the navigation bar includes 'IOWA Department of Education IDEA PBC' and 'Individuals with Disabilities Education Act Parts B & C'. The main content area is titled 'Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)'. A 'File Upload' section is highlighted with a blue border, containing instructions and a 'Choose File' button. Below this, a 'Table of Claims File Upload Results' is shown, detailing budget and upload amounts for various expenditure types. A 'Claims File Upload Summary' table at the bottom provides a comprehensive overview of budget and claimed amounts across different claim periods.

**File Upload**

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.

**Validations**

Choose File No file chosen

File upload type must be .csv.

Each file upload will overwrite prior uploaded file.

Upload

**Table of Claims File Upload Results**

Expenditure Type	Approved Budget Part C	Approved Budget Birth to 3	csv File Upload Part C	csv File Upload Birth to 3	Error Messages
Salaries	\$285,140.00	\$75,000.00	\$38,833.90	\$16,083.91	
Employee Benefits	\$98,775.00	\$47,000.00	\$12,994.64	\$12,160.70	
Employee Travel	\$0.00	\$0.00			
Supplies & Materials	\$20,201.00	\$5,033.00	\$1,596.95	\$1,025.00	
Contracts	\$5,000.00	\$35,000.00	\$2,500.00	\$17,707.00	
Indirect Costs	\$10,000.00	\$0.00	\$5,000.00		
<b>Total</b>	<b>\$419,116.00</b>	<b>\$162,033.00</b>	<b>\$60,925.49</b>	<b>\$46,976.61</b>	

**Claims File Upload Summary**

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

Expenditure Type	Budget	Claim Period 1 - Part C	Claim Period 1 - Birth to 3	Claim Period 2 - Part C	Claim Period 2 - Birth to 3	Claim Period 3 - Part C	Claim Period 3 - Birth to 3	Total Claimed	Remaining Balance
Salaries	\$360,140.00	\$38,833.90	\$16,083.91					\$54,917.81	\$305,222.19
Employee Benefits	\$145,775.00	\$12,994.64	\$12,160.70					\$25,155.34	\$120,619.66
Employee Travel	\$0.00							\$0.00	\$0.00
Supplies & Materials	\$25,234.00	\$1,596.95	\$1,025.00					\$2,621.95	\$22,612.05
Contracts	\$40,000.00	\$2,500.00	\$17,707.00					\$20,207.00	\$19,793.00
Indirect Costs	\$10,000.00	\$5,000.00						\$5,000.00	\$5,000.00
<b>Total</b>	<b>\$581,149.00</b>	<b>\$60,925.49</b>	<b>\$46,976.61</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$107,902.10</b>	<b>\$473,246.90</b>

**Claims: Part C & Birth to 3** (Period 1 - 05/05/2026 - 05/15/2026)

- Screen Status >>
- General Info >>
- File Upload >>
- Staff Assignment >>
- Salaries, Benefits, & Travel >>
- Supplies & Materials >>
- Contracts >>
- Claims Summary >>
- Assurances

**File Upload**

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) (3310) that are not appropriate to IDEA Part C & Birth to 3 Funds.
- Object Code 613 is not allowed with Function Code 3310.

Step 1

Step 2

**Table of Claims File Upload Results**

Expenditure Type	Approved Budget Part C	Approved Budget Birth to 3	csv File Upload Part C	csv File Upload Birth to 3	Error Messages
Salaries	\$285,140.00	\$75,000.00	\$38,833.90	\$106,083.91	File upload includes costs in excess of the approved budget line item amount.
Employee Benefits	\$98,775.00	\$47,000.00	\$12,994.64	\$22,160.70	
Employee Travel	\$0.00	\$0.00			
Supplies & Materials	\$20,201.00	\$5,033.00	\$1,547.00	\$1,025.00	
Contracts	\$5,000.00	\$35,000.00	\$2,500.00	\$17,707.00	
Indirect Costs	\$10,000.00	\$0.00	\$5,000.00		
<b>Total</b>	<b>\$419,116.00</b>	<b>\$162,033.00</b>	<b>\$60,875.54</b>	<b>\$146,976.61</b>	

Step 3

**Anticipated Question:** In the past we were able to claim an amount within 10% of the budgeted amount. Can we still claim more than was in the budget per expenditure type, up to 10% more?

**Answer:** No. Claim amounts are limited to the amount in the approved budget in the IDEA PBC application.

**Table of Claims File Upload Results**

Expenditure Type	Approved Budget Part C	Approved Budget Birth to 3	csv File Upload Part C	csv File Upload Birth to 3	Error Messages
Salaries	\$285,140.00	\$75,000.00	\$138,833.90	\$13,104.91	
Employee Benefits	\$98,775.00	\$47,000.00	\$22,994.64	\$9,781.02	
Employee Travel	\$0.00	\$0.00			
Supplies & Materials	\$20,201.00	\$5,033.00	\$1,547.00	\$1,025.00	
Contracts	\$5,000.00	\$35,000.00	\$2,500.00	\$2,500.00	
Indirect Costs	\$10,000.00	\$0.00	\$5,000.00		
<b>Total</b>	<b>\$419,116.00</b>	<b>\$162,033.00</b>	<b>\$170,875.54</b>	<b>\$26,410.93</b>	

**Claims File Upload Summary**

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

Expenditure Type	Budget	Claim Period 1 - Part C	Claim Period 1 - Birth to 3	Claim Period 2 - Part C	Claim Period 2 - Birth to 3	Claim Period 3 - Part C	Claim Period 3 - Birth to 3	Total Claimed	Remaining Balance
Salaries	\$360,140.00	\$138,833.90	\$13,104.91					\$151,938.81	\$208,201.19
Employee Benefits	\$145,775.00	\$22,994.64	\$9,781.02					\$32,775.66	\$112,999.34
Employee Travel	\$0.00							\$0.00	\$0.00
Supplies & Materials	\$25,234.00	\$1,547.00	\$1,025.00					\$2,572.00	\$22,662.00
Contracts	\$40,000.00	\$2,500.00	\$2,500.00					\$5,000.00	\$35,000.00
Indirect Costs	\$10,000.00	\$5,000.00						\$5,000.00	\$5,000.00
<b>Total</b>	<b>\$581,149.00</b>	<b>\$170,875.54</b>	<b>\$26,410.93</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$197,286.47</b>	<b>\$383,862.53</b>

**All Errors Resolved!**



# 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 application interface. The header includes the IOWA Department of Education logo and the text "IDEA PBC Individuals with Disabilities Education Act Parts B & C". The navigation bar includes "Home" and "Contact" links, and the current year is "2025-2026". The main content area is titled "Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)". Below the title is a navigation menu with tabs for "Screen Status", "General Info", "File Upload", "Staff Assignment", "Salaries, Benefits, & Travel", "Supplies & Materials", "Contracts", "Claims Summary", and "Assurances". A paragraph explains that the Screen Status page provides an overview of the claims detail pages and that the claims submission will be certified on the Assurances page when all other pages are completed. Below this is a table with the following data:

Claims Page	Required For Certification	Started	Started Date	Submitted	Submitted Date	Updated By
General Information	Yes	Yes	04/30/2026 01:45:53 PM	Yes	04/30/2026 01:45:53 PM	App Dev User
File Upload	Yes	Yes	04/30/2026 01:46:06 PM	Yes	04/30/2026 02:08:28 PM	App Dev User
Staff Assignment	Yes	No		No		
Salaries, Benefits, & Travel	Yes	No		No		
Supplies & Materials	Yes	No		No		
Contracts	Yes	No		No		
Claims Summary	Yes			No		

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 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="#">Claims Summary »</a>	<a href="#">Assurances</a>
---------------------------------	--------------------------------	-------------------------------	------------------------------------	--	--	-----------------------------	----------------------------------	----------------------------

The Screen Status page provides a status overview of the claims detail pages in this application. First, complete the File Upload detail page. Then the Salaries, Benefits, & Travel; Supplies & Materials; Contracts claims detail pages will be required based on the information entered on the File Upload 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	Yes	04/30/2026 01:45:53 PM	Yes	04/30/2026 01:45:53 PM	App Dev User
File Upload	Yes	Yes	04/30/2026 01:46:06 PM	Yes	04/30/2026 02:08:28 PM	App Dev User
Staff Assignment	Yes	No		No		
Salaries, Benefits, & Travel	Yes	No		No		
Supplies & Materials	Yes	No		No		
Contracts	Yes	No		No		
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 Part C or Birth to 3 funds.

## Required Uploads:

- Staff Assignment

The screenshot shows the 'Claims: Part C & Birth to 3' page for the period 05/05/2026 - 05/15/2026. The page has a navigation menu with options: Screen Status, General Info, File Upload, Staff Assignment (selected), Salaries, Benefits, & Travel, Supplies & Materials, Contracts, Claims Summary, and Assurances. Below the menu, there are instructions for using the Staff Assignment table, including a file upload section with a 'Choose File' button, a text box for file type (.csv), and an 'Upload' button. There is also a manual entry section with fields for Employee First Name, Employee Last Name, BOEE Folder Number, FTE of Related Work (0.00), Position Title (- Select -), and Description of Work, with an 'Add Row' button.

## Anticipated Question:

How will this information be used?

**Answer:** Staff will prepopulate on Salaries, Benefits, & Travel page.

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

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

Staff Assignment

Instructions: The Staff Assignment 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"/>

50/50

+ 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 C & Birth to 3 funds. All columns are required except for BOEE Folder Number.

- Note : 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.

**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.

Choose File No file chosen

File upload type must be .csv.

Each file upload will overwrite prior uploaded file.

Upload



Position Title

	A	B	C	D	E	F	G
1	AEA Number	Employee First Name	Employee Last Name	FTE	Position Title	Description of Work	BOEE Folder Number
2							
3							

- Select -
- Admin Support
- Administrator
- Audiologist
- Early ACCESS Liaison
- Early ACCESS Teacher
- Nutritionist
- Occupational Therapist
- Physical Therapist
- Psychologist
- Service Coordinator
- Social Worker
- Speech Pathologist
- Teacher of the Deaf and Hard of Hearing
- Teacher of the Visually Impaired
- Other Position

### Steps to Enter Manually.

**Step 1:** Manually enter the requested information for each employee that is paid using IDEA Part C & Birth to 3 funds. All columns are required except for BOEE Folder Number.

- Note: The Description of Work is a summary of the employee's job responsibilities. Please limit description to 50 characters and do not include punctuation in the description.

**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

+ Add Row

## Staff Assignment Detail

Show  rows per page

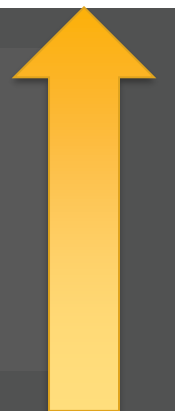
Search:

Employee First Name	Employee Last Name	FTE of Related Work	Position Title	Description of Work	BOEE Folder Number	Approved/Returned	Action
Lehman	Sue	1	Administrator	test	220100		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 0</a>
Long	Amy	1	Speech Pathologist	test	2250460		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 0</a>
Johnson	Gary	1	Social Worker	test	112205		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 0</a>
Jones	Jim	0.5	Audiologist	test			<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 0</a>
Smith	Mary	1	Nutritionist	test	2259460		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 0</a>
Thompson	Sarah	1	Service Coordinator	test	123456		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 0</a>

### 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



**Salaries, Benefits & Travel Claims Detail**

Employee Name	Part C Salaries	Part C Benefits	Part C Travel	Birth to 3 Salaries	Birth to 3 Benefits	Birth to 3 Travel	Total	Approved/Returned	Action
Thompson Sarah 123456	\$70,788.90	\$11,286.64	\$0.00	\$0.00	\$0.00	\$0.00	\$82,075.54		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files</a>
Johnson Gary 112205	\$68,045.00	\$11,708.00	\$0.00	\$0.00	\$0.00	\$0.00	\$79,753.00		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files</a>
Lehman Sue 220100	\$0.00	\$0.00	\$0.00	\$13,104.91	\$9,781.02	\$0.00	\$22,885.93		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files</a>
<b>Totals</b>	<b>\$138,833.90</b>	<b>\$22,994.64</b>	<b>\$0.00</b>	<b>\$13,104.91</b>	<b>\$9,781.02</b>	<b>\$0.00</b>	<b>\$184,714.47</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\(g\)](#) as summarized below.



## Time & Effort



- Existing federal requirement (2 CFR. § 200.430(g))
- For the **Budget** process – document **PLAN** how the district will prove duties were allowable to be charged to the SE program
  - Board policy or
  - Description of the business procedures
- For the **Claims** process – document **EVIDENCE**
  - Exhibits actual time spent
  - Exhibits use of time
  - Exhibits total employee time by program



## Time & Effort: Summarized



- Existing federal requirement (2 CFR. § 200.430(g))
  1. Be supported through a system of **internal controls**; be accurate, allowable, and properly allocated
  2. Be incorporated into **official records**
  3. Percent of **FTE** paid from this distinct federal/non-federal sources and direct/indirect activities
  4. Comply with **accounting records** requirements



## Time & Effort: Evidence Options



Evidence	Demonstrated Through .csv Accounting File	Demonstrated Through Other Evidence
Supported through a system of internal controls	Yes	Yes
Be a part of official records	Yes	Yes
FTE by source and activity type	Yes	Yes
Comply with accounting records requirements	Yes	Yes



## Time & Effort: Evidence Options



So what does the  
Department need for  
evidence?



## Time & Effort: Evidence Options



FY26 & FY27  
Everyone has different  
evidence. Show us what  
you are doing and using.



## Time & Effort: Evidence Options



FY28 and beyond  
We will work to identify similarities and potential efficiencies in the application.




## Time & Effort: Evidence Options: Internal Controls



## Demonstration of Funding Distribution by Proportion of Work Activities for each Staff Member

Internal Controls: Be sure your process includes employee acknowledgement, submission, and certification to verify records.



## Time & Effort: Evidence Options: Additional Audit Records



### Demonstration of Funding Distribution by Proportion of Work Activities for each Staff Member

*All staff – Payroll Report (actual payroll distribution by fund and amount)  
OR  
Exempt Staff – Certification signed / dated after the claim period*

**Additional audit records** may be tested through additional evidence.  
*Examples include:*

Exempt staff – Incremental and year-end class rosters  
Non-exempt staff – Daily and detailed work logs

**Claims: Part C & Birth to 3** (Period 1 - 05/05/2026 - 05/15/2026)

<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="#">Claims Summary &gt;&gt;</a>	<a href="#">Assurances</a>
--	---------------------------------------	--------------------------------------	---	---	---	------------------------------------	---	----------------------------

Salaries, Benefits, & Travel

**Instructions:** Select an employee from the employee name list and enter the applicable Salaries, Benefits, & Travel amounts for this claim period. At least one amount is required per row.

**Employee Name**

<b>Part C Salaries</b> <input type="text" value="\$"/>	<b>Part C Benefits</b> <input type="text" value="\$"/>	<b>Part C Travel</b> <input type="text" value="\$"/>
<b>Birth to 3 Salaries</b> <input type="text" value="\$"/>	<b>Birth to 3 Benefits</b> <input type="text" value="\$"/>	<b>Birth to 3 Travel</b> <input type="text" value="\$"/>

[+ Add Row](#)

**Salaries, Benefits & Travel Claims Detail**

Show  rows per page

Search:

Employee Name	Part C Salaries	Part C Benefits	Part C Travel	Birth to 3 Salaries	Birth to 3 Benefits	Birth to 3 Travel	Total	Approved/Returned	Action
Thompson Sarah 123456	\$70,788.90	\$11,286.64	\$0.00	\$0.00	\$0.00	\$0.00	\$82,075.54		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 1</a>
Johnson Gary 112205	\$68,045.00	\$11,708.00	\$0.00	\$0.00	\$0.00	\$0.00	\$79,753.00		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 1</a>
Lehman Sue 220100	\$0.00	\$0.00	\$0.00	\$13,104.91	\$9,781.02	\$0.00	\$22,885.93		<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Files 1</a>
<b>Totals</b>	<b>\$138,833.90</b>	<b>\$22,994.64</b>	<b>\$0.00</b>	<b>\$13,104.91</b>	<b>\$9,781.02</b>	<b>\$0.00</b>	<b>\$184,714.47</b>		

### Allocation and Claims Comparison Table - Salaries

Salaries Summary	Part C	Birth to 3	Total
Total <b>Salaries</b> budget	\$285,140.00	\$75,000.00	\$360,140.00
<b>Salaries</b> from file	\$138,833.90	\$13,104.91	\$151,938.81
Amount of <b>Salaries</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Salaries</b> Available to claim	\$138,833.90	\$13,104.91	\$151,938.81
Sum of <b>Salaries</b> Entered above	\$138,833.90	\$13,104.91	\$151,938.81
Remaining <b>Salaries</b> to claim this period	\$0.00	\$0.00	\$0.00
Remaining <b>Salaries</b> to claim in a future period	\$146,306.10	\$61,895.09	\$208,201.19

### Allocation and Claims Comparison Table - Benefits

Benefits Summary	Part C	Birth to 3	Total
Total <b>Benefits</b> budget	\$98,775.00	\$47,000.00	\$145,775.00
<b>Benefits</b> from file	\$22,994.64	\$9,781.02	\$32,775.66
Amount of <b>Benefits</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Benefits</b> Available to claim	\$22,994.64	\$9,781.02	\$32,775.66
Sum of <b>Benefits</b> Entered above	\$22,994.64	\$9,781.02	\$32,775.66
Remaining <b>Benefits</b> to claim this period	\$0.00	\$0.00	\$0.00
Remaining <b>Benefits</b> to claim in a future period	\$75,780.36	\$37,218.98	\$112,999.34

### Allocation and Claims Comparison Table - Travel

Travel Summary	Part C	Birth to 3	Total
Total <b>Travel</b> budget	\$0.00	\$0.00	\$0.00
<b>Travel</b> from file	\$0.00	\$0.00	\$0.00
Amount of <b>Travel</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Travel</b> Available to claim	\$0.00	\$0.00	\$0.00
Sum of <b>Travel</b> Entered above	\$0.00	\$0.00	\$0.00
Remaining <b>Travel</b> to claim this period	\$0.00	\$0.00	\$0.00
Remaining <b>Travel</b> to claim in a future period	\$0.00	\$0.00	\$0.00



# Claims Detail Page: Supplies & Materials

**Purpose:** Collects the detail for the related amount, if any, claimed for supplies 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

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

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

Supplies & Materials

**Instructions:** Enter the following information in the table below as applicable to this claim: Select Program Type (Part C or Birth to 3), vendor name (Vendor), the supplies or materials purchased (Supply/Material Purchased), a description of use in the applicable program (Description of Use), the amount reported on the .csv upload (Amount), and an upload of the invoice (File Upload - Invoice). The costs displayed should reflect the amount reported in the .csv file upload less any amount previously claimed/approved.

Program Type: Select  
Vendor: 60/60  
Supply/Material Purchased: 3200/3200  
Description of Use: 3200/3200  
Amount: \$ + Add Row

**Supplies & Materials Claims Detail - Part C**  
Show 10 rows per page

Vendor	Supply/Material Purchased	Description of Use in SE Program	Amount	File Upload - Invoice	Approved/Returned	Action
Vendor	supplies	description	\$1,547.00	Files 1		Edit Remove
<b>Totals</b>			<b>\$1,547.00</b>			

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

**Supplies & Materials Claims Detail - Birth to 3**  
Show 10 rows per page

Vendor	Supply/Material Purchased	Description of Use in CEIS Program	Amount	File Upload - Invoice	Approved/Returned	Action
Vendor	supplies	description	\$1,025.00	Files 1		Edit Remove
<b>Totals</b>			<b>\$1,025.00</b>			

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

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

Supplies & Materials Summary	Part C	Birth to 3	Total
Total <b>Supplies &amp; Materials</b> budget	\$20,201.00	\$5,033.00	\$25,234.00
<b>Supplies &amp; Materials</b> from file	\$1,547.00	\$1,025.00	\$2,572.00
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	\$1,547.00	\$1,025.00	\$2,572.00
Sum of <b>Supplies &amp; Materials</b> Entered above	\$1,547.00	\$1,025.00	\$2,572.00
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	\$18,654.00	\$4,008.00	\$22,662.00

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

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

Supplies & Materials

**Instructions:** Enter the following information in the table below as applicable to this claim: Select Program Type (Part C or Birth to 3), vendor name (Vendor), the supplies or materials purchased (Supply/Material Purchased), a description of use in the applicable program (Description of Use), the amount reported on the .csv upload (Amount), and an upload of the invoice (File Upload - Invoice). The costs displayed should reflect the amount reported in the .csv file upload less any amount previously claimed/approved.

Program Type:

Vendor:

Supply/Material Purchased:

Description of Use:

Amount: \$

[+ Add Row](#)

Supplies & Materials Claims Detail - Part C

Show 10 rows per page Search:

Vendor	Supply/Material Purchased	Description of Use in SE Program	Amount	File Upload - Invoice	Approved/Returned	Action
Vendor	supplies	description	\$1,547.00	<a href="#">Files 1</a>		<a href="#">Edit</a> <a href="#">Remove</a>
<b>Totals</b>			<b>\$1,547.00</b>			

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

Supplies & Materials Claims Detail - Birth to 3

Show 10 rows per page Search:

Vendor	Supply/Material Purchased	Description of Use in CEIS Program	Amount	File Upload - Invoice	Approved/Returned	Action
Vendor	supplies	description	\$1,025.00	<a href="#">Files 1</a>		<a href="#">Edit</a> <a href="#">Remove</a>
<b>Totals</b>			<b>\$1,025.00</b>			

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

Allocation and Claims Comparison Table - Supplies & Materials

Supplies & Materials Summary	Part C	Birth to 3	Total
Total <b>Supplies &amp; Materials</b> budget	\$20,201.00	\$5,033.00	\$25,234.00
<b>Supplies &amp; Materials</b> from file	\$1,547.00	\$1,025.00	\$2,572.00
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	\$1,547.00	\$1,025.00	\$2,572.00
Sum of <b>Supplies &amp; Materials</b> Entered above	\$1,547.00	\$1,025.00	\$2,572.00
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	\$18,654.00	\$4,008.00	\$22,662.00



# 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

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

Screen Status » General Info » File Upload » Staff Assignment » Salaries, Benefits, & Travel » Supplies & Materials » Contracts » 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  
 Part C Amount: \$ Birth to 3 Amount: \$ + Add Row

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

Show 10 rows per page Search:

Vendor	Services	Contract Desc	Contract Files	Part C Amount	Birth to 3 Amount	Invoice Files	Comments	Approved/Returned	Action
Vendor	Services	Other	Budget Files 1 Claim Files 0			Files 0			Edit Remove
Vendor	Services	Description	Budget Files 1 Claim Files 0			Files 0			Edit Remove
<b>Totals</b>				<b>\$0.00</b>	<b>\$0.00</b>				

Showing 1 to 2 of 2 entries First Previous 1 Next Last

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

Contracts Summary	Part C	Birth to 3	Total
Total Contracts budget	\$5,000.00	\$35,000.00	\$40,000.00
Contracts from file	\$2,500.00	\$2,500.00	\$5,000.00
Amount of Contracts Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of Contracts Available to claim	\$2,500.00	\$2,500.00	\$5,000.00
Sum of Contracts Entered above	\$0.00	\$0.00	\$0.00
Remaining Contracts to claim this period	\$2,500.00	\$2,500.00	\$5,000.00
Remaining Contracts to claim in a future period	\$2,500.00	\$32,500.00	\$35,000.00

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

- Screen Status »
- General Info »
- File Upload »
- Staff Assignment »
- Salaries, Benefits, & Travel »
- Supplies & Materials »
- Contracts »
- 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**

**Description**

**Part C Amount** \$

**Birth to 3 Amount** \$

**Service(s)**

**Comments**

[+ Add Row](#)

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

Show 10 rows per page

Search:

Vendor	Services	Contract Desc	Contract Files	Part C Amount	Birth to 3 Amount	Invoice Files	Comments	Approved/Returned	Action
Vendor	Services	Other	<div style="border: 1px solid blue; padding: 2px;"> <span>Budget Files 1</span>  <span>Claim Files 0</span> </div>			<div style="border: 1px solid blue; padding: 2px;"> <span>Files 0</span> </div>			<div style="border: 1px solid blue; padding: 2px;"> <span>Edit</span>  <span>Remove</span> </div>
Vendor	Services	Description	<div style="border: 1px solid blue; padding: 2px;"> <span>Budget Files 1</span>  <span>Claim Files 0</span> </div>			<div style="border: 1px solid blue; padding: 2px;"> <span>Files 0</span> </div>			<div style="border: 1px solid blue; padding: 2px;"> <span>Edit</span>  <span>Remove</span> </div>
<b>Totals</b>				\$0.00	\$0.00				

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

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

Contracts Summary	Part C	Birth to 3	Total
Total <b>Contracts</b> budget	\$5,000.00	\$35,000.00	\$40,000.00
<b>Contracts</b> from file	\$2,500.00	\$2,500.00	\$5,000.00
Amount of <b>Contracts</b> Previously Claimed	\$0.00	\$0.00	\$0.00
Amount of <b>Contracts</b> Available to claim	\$2,500.00	\$2,500.00	\$5,000.00
Sum of <b>Contracts</b> Entered above	\$0.00	\$0.00	\$0.00
Remaining <b>Contracts</b> to claim this period	\$2,500.00	\$2,500.00	\$5,000.00
Remaining <b>Contracts</b> to claim in a future period	\$2,500.00	\$32,500.00	\$35,000.00

**Claims: Part C & Birth to 3** (Period 1 - 05/05/2026 - 05/15/2026)

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

The Screen Status page provides a status overview of the claims detail pages in this application. First, complete the File Upload detail page. Then the Salaries, Benefits, & Travel; Supplies & Materials; Contracts claims detail pages will be required based on the information entered on the File Upload 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	Yes	04/30/2026 01:45:53 PM	Yes	04/30/2026 01:45:53 PM	App Dev User
File Upload	Yes	Yes	04/30/2026 01:46:06 PM	Yes	04/30/2026 02:08:28 PM	App Dev User
Staff Assignment	Yes	Yes	04/30/2026 02:17:59 PM	Yes	04/30/2026 02:20:09 PM	App Dev User
Salaries, Benefits, & Travel	Yes	Yes	04/30/2026 02:21:36 PM	Yes	04/30/2026 02:28:44 PM	App Dev User
Supplies & Materials	Yes	Yes	04/30/2026 02:30:01 PM	Yes	04/30/2026 02:36:00 PM	App Dev User
Contracts	Yes	Yes	04/30/2026 02:36:04 PM	Yes	04/30/2026 02:47:12 PM	App Dev User
Claims Summary	Yes			No		



# Claims Detail Page: Claims Summary

**Purpose:** Collects the narrative and key codes for each expenditure type.



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

The screenshot shows the IDEA PBC Claims Summary page. The header includes the Iowa Department of Education logo and the text "IDEA PBC Individuals with Disabilities Education Act Parts B & C". The page title is "Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)". A navigation menu includes "Screen Status", "General Info", "File Upload", "Staff Assignment", "Salaries, Benefits, & Travel", "Supplies & Materials", "Contracts", "Claims Summary", and "Assurances". The "Claims Summary" section contains a table titled "Use of Funds Narrative & Claims Summary" with columns for Expenditure Type, Total Budget, Part C: Amount Narrated, Part C: Budget, Birth to 3: Amount Narrated, Birth to 3: Budget, Approved/Returned, and Action. The table lists Salaries, Employee Benefits, Supplies & Materials, and Contracts, with a Total row at the bottom. Each row has an "Edit" button.

Expenditure Type	Total Budget	Part C: Amount Narrated	Part C: Budget	Birth to 3: Amount Narrated	Birth to 3: Budget	Approved/Returned	Action
Salaries	\$360,140.00	\$285,140.00	\$285,140.00	\$75,000.00	\$75,000.00		<a href="#">Edit</a>
Employee Benefits	\$145,775.00	\$98,775.00	\$98,775.00	\$47,000.00	\$47,000.00		<a href="#">Edit</a>
Supplies & Materials	\$25,234.00	\$20,201.00	\$20,201.00	\$5,033.00	\$5,033.00		<a href="#">Edit</a>
Contracts	\$40,000.00	\$5,000.00	\$5,000.00	\$35,000.00	\$35,000.00		<a href="#">Edit</a>
<b>Total</b>	<b>\$571,149.00</b>	<b>\$409,116.00</b>	<b>\$409,116.00</b>	<b>\$162,033.00</b>	<b>\$162,033.00</b>		



Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

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

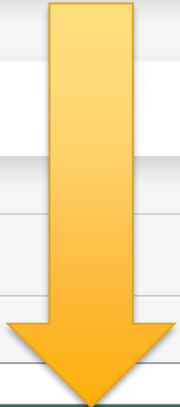
Claims Summary

Instructions: Select the Edit button next to each Expenditure Type to enter the required information.

Use of Funds Narrative & Claims Summary

Search:

Expenditure Type	Total Budget	Part C: Amount Narrated	Part C: Budget	Birth to 3: Amount Narrated	Birth to 3: Budget	Approved/Returned	Action
Salaries	\$360,140.00	\$285,140.00	\$285,140.00	\$75,000.00	\$75,000.00		<a href="#">Edit</a>
Employee Benefits	\$145,775.00	\$98,775.00	\$98,775.00	\$47,000.00	\$47,000.00		<a href="#">Edit</a>
Supplies & Materials	\$25,234.00	\$20,201.00	\$20,201.00	\$5,033.00	\$5,033.00		<a href="#">Edit</a>
Contracts	\$40,000.00	\$5,000.00	\$5,000.00	\$35,000.00	\$35,000.00		<a href="#">Edit</a>
<b>Total</b>	<b>\$571,149.00</b>	<b>\$409,116.00</b>	<b>\$409,116.00</b>	<b>\$162,033.00</b>	<b>\$162,033.00</b>		



Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

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

Claims Summary

Instructions: Select the Edit button next to each Expenditure Type to enter the required information.

Use of Funds Narrative & Claims Summary

Search:

Expenditure Type	Total Budget	Part C: Amount Narrated	Part C: Budget	Birth to 3: Amount Narrated	Birth to 3: Budget	Approved/Returned	Action
Salaries	\$360,140.00	\$285,140.00	\$285,140.00	\$75,000.00	\$75,000.00		<a href="#">Edit</a>
Employee Benefits	\$145,775.00	\$98,775.00	\$98,775.00	\$47,000.00	\$47,000.00		<a href="#">Edit</a>
Supplies & Materials	\$25,234.00	\$20,201.00	\$20,201.00	\$5,033.00	\$5,033.00		<a href="#">Edit</a>
Contracts	\$40,000.00	\$5,000.00	\$5,000.00	\$35,000.00	\$35,000.00		<a href="#">Edit</a>
<b>Total</b>	<b>\$571,149.00</b>	<b>\$409,116.00</b>	<b>\$409,116.00</b>	<b>\$162,033.00</b>	<b>\$162,033.00</b>		

Use of Funds Narrative - Employee Benefits














Instructions: Select Edit in the Action column for the Key code(s) that are appropriate for this Expenditure Type to provide the Use of Funds Narrative. Multiple key codes can be selected for this Expenditure Type.

Employee Benefits	Part C		Birth to 3		Total	Approved/Returned	Action
Budget Amount	\$98,775.00		\$47,000.00		\$145,775.00		
Budget Remaining	\$0.00		\$0.00		\$0.00		
Key	Narrative	Amount Narrated	Narrative	Amount Narrated	Total	Approved/Returned	Action
<a href="#">RIM</a>		\$0.00		\$0.00	\$0.00		<a href="#">Edit</a>
<a href="#">SUP</a>		\$0.00		\$0.00	\$0.00		<a href="#">Edit</a>
<a href="#">FAM</a>	narrative	\$98,775.00	narrative	\$47,000.00	\$145,775.00		<a href="#">Edit</a>
<a href="#">SC</a>		\$0.00		\$0.00	\$0.00		<a href="#">Edit</a>
<a href="#">EIS</a>		\$0.00		\$0.00	\$0.00		<a href="#">Edit</a>
<a href="#">OTHER</a>		\$0.00		\$0.00	\$0.00		<a href="#">Edit</a>
<b>Total</b>		<b>\$98,775.00</b>		<b>\$47,000.00</b>	<b>\$145,775.00</b>		

Save Expenditure

## Table of Key and Description

Key	Description
RIM	Support the personnel who assist the Grantee in assuring regional implementation of Administrative Rules for Early ACCESS (salary, benefits, travel, professional development, etc.). E.g. Regional Liaison, Regional Coordinators, Data personnel, etc.
SUP	Support collaboration, communication, and technical assistance within the regional system, including training activities for partners
FAM	Support participation of families in implementation, evaluation, and improvement of regional system (family participation/leadership)
SC	Provide service coordination to families
EIS	Provide early intervention services (EI services listed in EA Rules). This may include expanding special education contracts to year-round for those who provide early intervention services to infants and toddlers.
OTHER	Other eligible services

Claims Page	Required For Certification	Started	Started Date	Submitted	Submitted Date	Updated By
General Information	Yes	 Yes	04/30/2026 01:45:53 PM	 Yes	04/30/2026 01:45:53 PM	App Dev User
File Upload	Yes	 Yes	04/30/2026 01:46:06 PM	 Yes	04/30/2026 02:08:28 PM	App Dev User
Staff Assignment	Yes	 Yes	04/30/2026 02:17:59 PM	 Yes	04/30/2026 02:20:09 PM	App Dev User
Salaries, Benefits, & Travel	Yes	 Yes	04/30/2026 02:21:36 PM	 Yes	04/30/2026 02:28:44 PM	App Dev User
Supplies & Materials	Yes	 Yes	04/30/2026 02:30:01 PM	 Yes	04/30/2026 02:36:00 PM	App Dev User
Contracts	Yes	 Yes	04/30/2026 02:36:04 PM	 Yes	04/30/2026 02:47:12 PM	App Dev User
Claims Summary	Yes			 Yes	04/30/2026 02:50:48 PM	App Dev User

**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 AEAs assurance and allows for final claim certification.



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

A screenshot of the Iowa Department of Education IDEA PBC Claims Detail Page: Assurances. The page header includes the Iowa Department of Education logo and the IDEA PBC title. The main content area shows a navigation menu with options like Screen Status, General Info, File Upload, Staff Assignment, Salaries, Benefits, & Travel, Supplies & Materials, Contracts, Claims Summary, and Assurances. The Assurances section contains a form for certification and assurance, including a checkbox for certification, a text input for the Authorized Official's Title, and a date input for the certification date. A green CERTIFY button is visible at the bottom right of the form.

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

Home Contact Year 2025-2026

Claims: Part C & Birth to 3 (Period 1 - 05/05/2026 - 05/15/2026)

Screen Status > General Info > File Upload > Staff Assignment > Salaries, Benefits, & Travel > Supplies & Materials > Contracts > Claims Summary > Assurances

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: 9207-Central Rivers AEA

The above named applicant agency provides the following assurances:

**CERTIFICATION AND ASSURANCE**

I CERTIFY that to the best of my knowledge, 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.

Name of Agency's Authorized Official for Applicant Agency: App Dev User Date: 04/30/2026

Authorized Official's Title Applicant Agency

CERTIFY

## CERTIFICATION AND ASSURANCE

I CERTIFY that to the best of my knowledge, 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.

Step 1

Name of Agency's Authorized Official for Applicant Agency:

App Dev User

Date:

04/30/2026

Authorized Official's Title

Step 2

Applicant Agency

Step 3

 CERTIFY



Department of Education

IDEA PBC

Individuals with Disabilities Education Act Parts B & C

Sarah Sheeder Portal Logout

[Home](#) [Contact](#)

Year 2025-2026

 **Claims: Part C & Birth to 3** (Period 1 - 05/05/2026 - 05/15/2026)

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

- |                                 |                                |                               |                                    |  |  |                             |                                  |                            |
|---------------------------------|--------------------------------|-------------------------------|------------------------------------|--|--|-----------------------------|----------------------------------|----------------------------|
| <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="#">Claims Summary »</a> | <a href="#">Assurances</a> |
|---------------------------------|--------------------------------|-------------------------------|------------------------------------|--|--|-----------------------------|----------------------------------|----------------------------|

# 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  
*\*Must have an approved budget to submit a claim*

**June 15**

Claims Period 2 Open

**July 15**


Claims Period 2 Certification Deadline



# Resources

## AEA: IDEA PBC Resources

[IDEA PBC Budget \(Part C and Birth to 3\) User Instructions \(1.09 MB\)](#) .pdf

[IDEA PBC Budget \(Part C and Birth to 3\) Webinar Recording](#)  - Recorded 4-21-26. Introduced AEA users to the IDEA PBC Application budget process for Part C and Birth to 3 funding sources.

[IDEA PBC Budget \(Part C and Birth to 3\) Webinar PowerPoint \(4-21-26\)](#)  
(5.17 MB) .pdf



Special Education Finance web page:  
[IDEA PBC Part C & Birth to 3 Instructions](#)



IDEA PBC Application Questions:  
[SpecialEducationFinance@iowa.gov](mailto:SpecialEducationFinance@iowa.gov)



Part C & Birth to 3 Program Questions:  
[Celeste.Mortvedt@iowa.gov](mailto:Celeste.Mortvedt@iowa.gov)



# Questions



Department of Education