IDEA PBC Application

LEA Staff Assignment Instructions

September 2026

IOWA | Department of Education

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IDEA PBC Application – Staff Assignment Overview

The IDEA PBC Application is used to monitor the activities of subrecipients who receive federal IDEA Part B funds through the Iowa Department of Education as required by the Code of Federal Regulation's Uniform Administrative Requirements for Federal Awards 34 C.F.R. §§ 300.149, and 300.600 through 300.602. The Staff Assignment section of the application is used by districts to report employees who are fully or partially funded with IDEA Part B Funds.

Location of the IDEA PBC Application

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

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

Preparing to Enter Staff Assignment Information

The table below provides a summary of information needed for each employee who will be reported in the Staff Assignment.

Field Name	Description	Required?
Employee Name: First	Employee First Name	Yes
Employee Name: Last	Employee Last Name	Yes
BOEE/EEID	Employee's Board of Educational Examiners License Number OR the AEA Assigned Employee ID (EE ID)	Yes
FTE of Related Work	FTE of the employee's salaries and benefits that are partially or fully funded with IDEA Part B funds	Yes
Position Title	Employee's Position Title. *Valid Position Titles are listed below.* • Teacher • Paraprofessional • Other	Yes
Position Title 2	Employee's Position Title 2	No
Description of Work	Brief explanation of the employee's job duties	Yes
Expenditure Type: SE	Funding Stream is Part C & Birth to 3 (Yes or No)	Yes
Expenditure Type: CEIS	Expenditure is for CEIS (Yes or No)	Yes

Expenditure Type: Transportation	Expenditure is for Transportation (Yes or No)	Yes

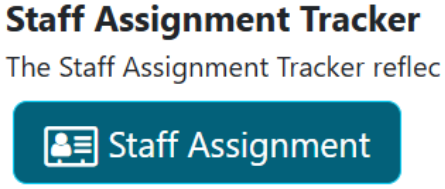
Application Landing Page

Purpose

Users can access budget detail, staff assignment detail, or claims detail. The Budget Tracker, Staff Assignment Tracker, and Claims Tracker located on the top of the screen will display the status of the related process.

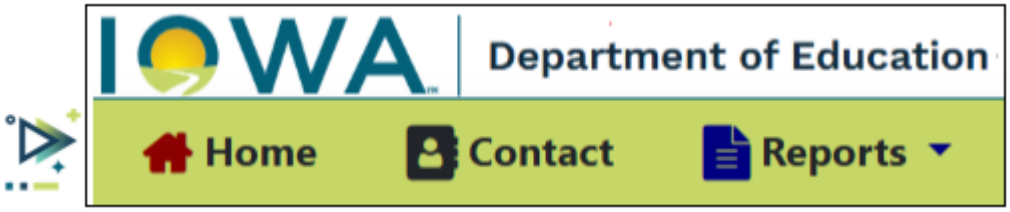
Insider Tip

Staff Assignment is available throughout the fiscal year and is only required if claiming salaries, benefits, and/or travel.



Insider Tip

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



Staff Assignment – Add Staff

Purpose

The purpose of this section is to collect a list of all district/AEA employees who are fully or partially paid with IDEA Part B funds as well as a description of the employee's staff assignment information.

Steps to Complete the Staff Assignment Claims Page

Staff information can be uploaded using the Staff Assignment Template or through manual entry.

Step	Action
1	**Click Add Staff.** Add Staff
2	**Select the option that will be used to add staff to the Staff Assignment page.** • **Option 1**: File Upload (staff will be entered on a .csv file and uploaded into the application) • **Option 2**: Manual Entry (staff will be added manually in the application) File Upload Manual Entry
3	**Proceed to the table below for the option selected.**

Staff Assignment – Add Staff (File Upload)

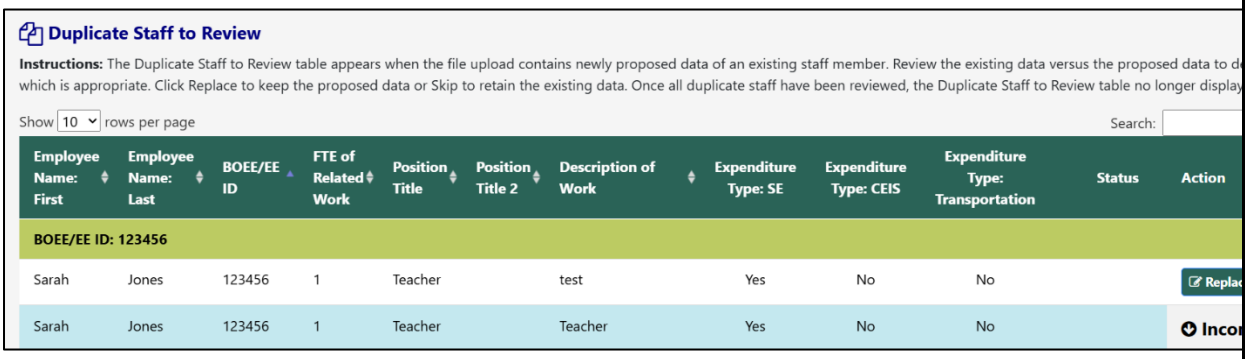
Option 1: Steps to Add Staff via Staff List Template

Step	Action
1	**Download the Staff List Upload Template located under Step 1.** **Step 1:** Download the **Staff List Upload Template** Enter the information in the Staff List Template by column and as described below.
2	**Column A: District Number** Enter AEA Number.
3	**Column B: Employee Name: First** Enter Employee First Name.
4	**Column C: Employee Name: Last** Enter Employee Last Name.

5	**Column D**: **BOEE/EE ID** Enter the employee's BOEE Folder Number or AEA-assigned Employee ID (EE ID) number.
6	**Column E**: **FTE of Related Work** Enter the Employee's Full-Time Equivalent (FTE) funded from IDEA Part B Funds.
7	**Column F: Position Title** Enter one of the valid Position Titles listed below the Employee's Position Title. ○ Teacher ○ Paraprofessional ○ Other
8	**Column G: Position Title 2** Enter the Employee's Position Title 2, if applicable. *This field is optional.*
9	**Column H: Description of Work** Enter the Employee's Description of Work. This column is limited to 50 characters.
10	**Column I: Expenditure Type: SE (Yes or No)** Enter Yes or No. Yes = Any portion of the employee's salaries and/or benefits are paid from IDEA Part B funds, special education instruction, or pupil transportation required for special education purposes. No = CEIS only
11	**Column J: Expenditure Type: CEIS (Yes or No)** Enter Yes or No. Yes = CEIS only No = Not CEIS
12	**Column K: Expenditure Type: Transportation (Yes or No)** Enter Yes or No. Yes = Portion of the employee's salaries and/or benefits paid from IDEA Part B funds is for pupil transportation required for special education purposes. No = Not applicable
13	After all employees have been added, save the file in .csv format.
14	Click the Choose File button to select the spreadsheet.
15	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file.
16	Click Upload to upload the file.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>17</td><td>Click on Close to return to the Staff Assignment page.

</td></tr>
<tr><td>18</td><td>If a staff member has been submitted, returned, or approved and is resubmitted with the same BOEE ID or Employee ID (EE ID) on a subsequent .csv file, the Duplicate Staff to Review table will appear. Compare the existing data to the new data in the .csv file and select Skip to retain the information in the application, or Replace to replace it with the new data in the .csv file.

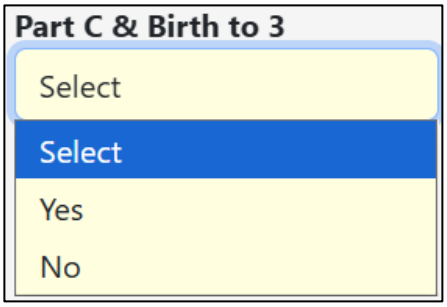
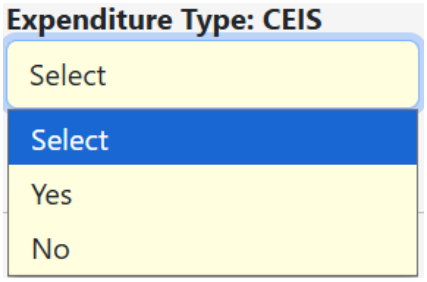
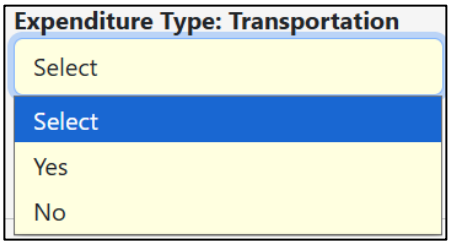
 
</td></tr>
<tr><td>19</td><td>The staff listed on the spreadsheet will display in the table titled Staff Assignment - In Progress.

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

Staff Assignment – Add Staff (Manual Entry)

Option 2: Staff Assignment - Enter Staff Manually

Step	Action
1	Enter Employee Name: First **Employee First Name**
2	Enter Employee Name: Last **Employee Last Name**
3	Enter BOEE Folder Number or the district-assigned Employee ID (EE ID). **BOEE/EE ID**
4	Enter the employee's full time equivalent (FTE of Related Work) that is paid for with IDEA Part B Funds. **FTE of Related Work** 0.00
5	Select the employee's Position Title from the dropdown box (Teacher, Paraprofessional, or Other). **Position Title** Select Select Teacher Paraprofessional Other Enter the employee's Position Title 2, if applicable. *This field is optional.*
6	Enter the employee's Description of Work. **Description of Work**

7	Enter Yes or No. Yes = Any portion of the employee's salaries and/or benefits are paid from IDEA Part B funds, special education instruction, or pupil transportation required for special education purposes. No = CEIS only 
8	Enter Yes or No. Yes = CEIS only No = Not CEIS 
9	Enter Yes or No. Yes = Portion of the employee's salaries and/or benefits paid from IDEA Part B funds is for pupil transportation required for special education purposes. No = Not applicable 
10	Click Add Row to add the employee to the Staff Assignment Detail table.
11	The staff listed on the spreadsheet will display in the table titled Staff Assignment - In Progress.

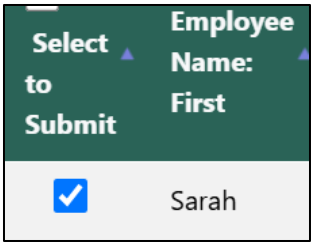
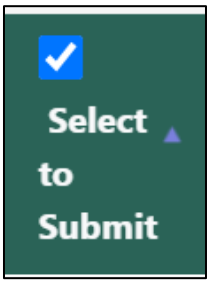
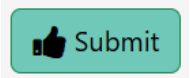
	Staff Assignment - In Progress (2)

Staff Assignment – In Progress

Purpose

This table displays the list of employees that have been added to the application either by file upload or manual entry. Employees in this table can be edited until submitted to the Department for review. Approved employees will be available to include in a claim for salaries, benefits, and/or travel.

Step	Action
1	Click on Files in the Action column to upload proof of the staff responsibilities. Examples may include: class rosters, assignments, or other documentation that illustrates how staff time is used. **Insider Tip** As files are added, this tab will update to display the number of files uploaded.
2	Click the Choose File button to select the file.
3	Once the file has been selected, the screen will change from displaying No file chosen to the name of the uploaded file.
4	Click Upload to upload the file.
5	Click on Close to return to the Staff Assignment page.
6	Once all data is accurate and a file upload has been added, submit the employee to the Department for review. • To submit an individual staff member, select the box next to the employee's name in the Select to Submit column.

	 • To submit all employees listed in the table, click on the box located above the Select to Submit column. 
7	Click Submit to Finish. 

Insider Tip

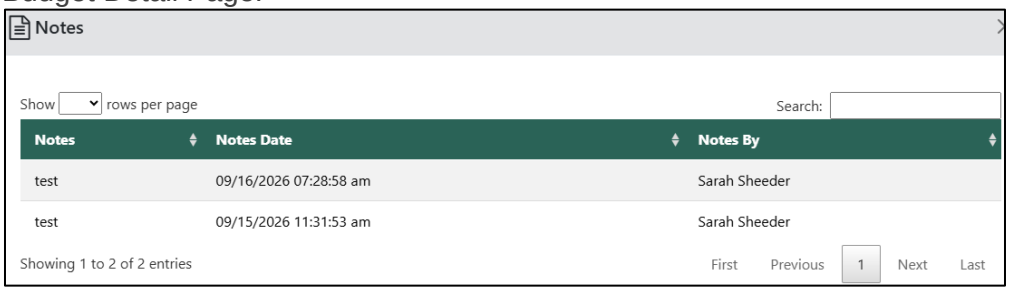
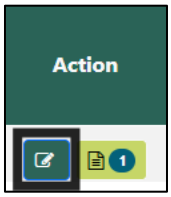
This table can be collapsed on the screen by clicking the table title.

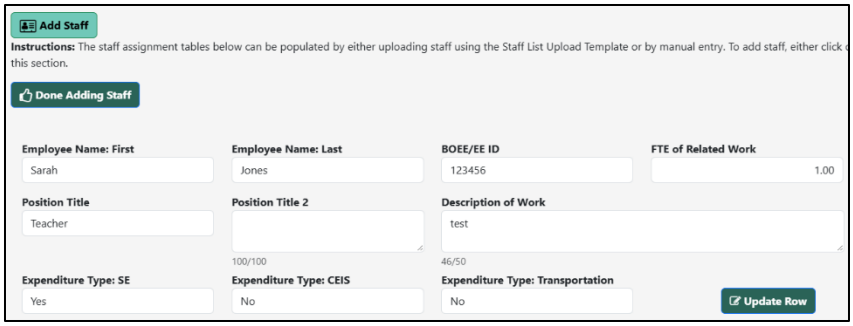
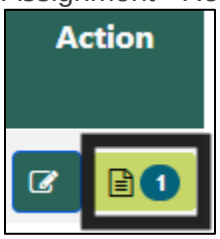
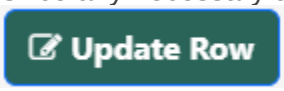
Staff Assignment - In Progress (4)

Staff Assignment - Returned

Purpose

This table displays the list of employees who have been returned by the Department for further clarification and/or documentation.

Step	Action
1	Click the information icon in the Return Notes column to review Department Return Notes. **Insider Tip** If the Return Notes column is not viewable, use the scroll bar located at the bottom of the table to scroll right.
2	Once the Department's Return Notes have been reviewed, close the box to return to the Budget Detail Page. 
3	In the Action column, click the Edit icon to update the employee information. 
4	After the Edit icon is selected, the employee information will be moved to the top of the screen under "Add Staff" where the information can be edited as appropriate.

	
5	If a new file uploaded is needed, click on the Files icon in the Action column in the Staff Assignment - Returned table. 
6	Once any necessary updates have been made, click Update Row to save changes.  **Note:** After clicking on the Update Row, the employee will be moved to the Staff Assignment - In Progress table and may be resubmitted to the Department for review.

This table can be collapsed on the screen by clicking the table title.

Staff Assignment – Submitted

Purpose

This table displays the list of employees who have been submitted to the Department for review. This table is read-only and cannot be changed by the user.

Staff Assignment - Submitted (1)

Instructions: The Staff Assignment - Submitted table displays the staff submitted to the Department for review. This table is read-only and cannot be changed. Once the Department returns or approves staff, the staff will appear in the Staff Assignment - Returned table or the Staff Assignment - Approved table.

Employee Name: First	Employee Name: Last	BOEE/EE ID	FTE of Related Work	Position Title	Position Title 2	Description of Work	Expenditure Type: SE	Expenditure Type: CEIS	Expenditure Type: Transportation	Date: Last Submitted	Date: Last Returned	Date: Last Approved	Date: Last Modified	Part B			
														CP1	CP2	CP3	CP4
Lori	Palmer	12	1	Teacher		test	Yes	No	No	09/15/2026 11:30:58 am	09/15/2026 11:17:41 am		09/15/2026 11:18:18 am	No	No	No	No

Staff Assignment - Approved

Purpose

This table displays the list of employees that have been approved by the Department. Employees that are approved are available to include in a claim.

Once staff are included in a claim, the staff record cannot be deleted, but additional expenditure types may be added.

Staff Assignment - Approved (4)

Instructions: The Staff Assignment - Approved table displays staff who are approved by the Department and are eligible to be included in a claim. Once staff are included in a claim, the staff record cannot be deleted, but additional expenditure types may be added.

Employee Name: First	Employee Name: Last	BOEE/EE ID	FTE of Related Work	Position Title	Position Title 2	Description of Work	Expenditure Type: SE	Expenditure Type: CEIS	Expenditure Type: Transportation	Date: Last Submitted	Date: Last Returned	Date: Last Approved	Date: Last Modified	Approved Notes	Part B				Action
															CP1	CP2	CP3	CP4	
James	Johnson	98765432	1	teacher		Description of Work	Yes	No	No	09/15/2026 10:48:07 am		09/15/2026 10:48:52 am			Yes	No	No	No	
Matt	Jones	11111111	1	Other		driver	No	No	Yes	09/15/2026 11:10:33 am		09/15/2026 11:11:00 am			No	No	No	No	
Thomas	Peterson	1111	1	Paraprofessional		test	Yes	No	No	09/15/2026 11:15:24 am		09/15/2026 11:17:48 am			No	No	No	No	
Mary	Smith	12345678	1	Teacher		Description of Work	Yes	No	No	09/15/2026 11:00:27 am	09/15/2026 10:49:05 am	09/15/2026 11:01:32 am	09/15/2026 10:55:18 am		No	No	No	No	

Insider Tip

The columns titled CP1, CP2, CP3, and CP4 will indicate if the employee has been included in any of the four Claims Periods.