

Highway to the SPED Zone

July 23, 2025



Introductions

Steve Wilt, MBA, CSBO: (Speaker)

-CSBO, *The Winnetka Public Schools District 36*

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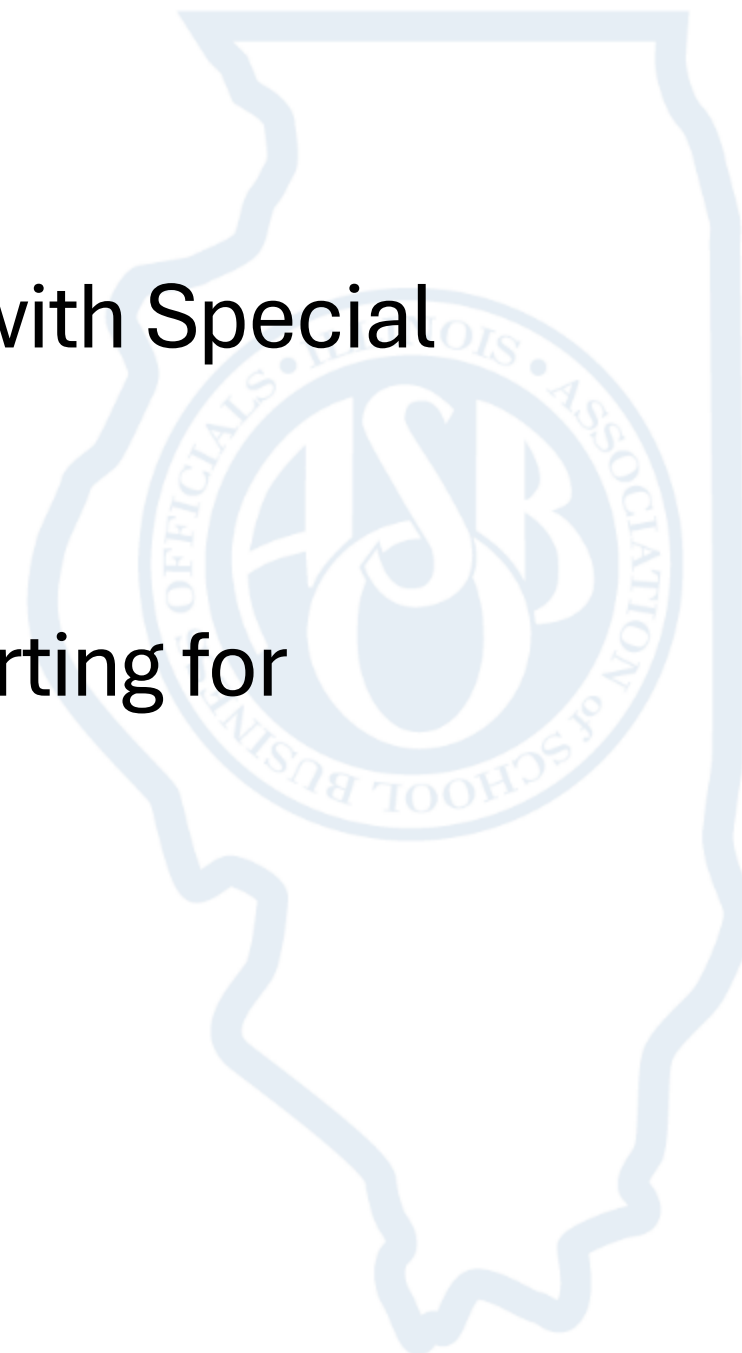


NDSEC



OBJECTIVES

- Release the break in developing relationships with Special Education Directors and/or Cooperatives
- Shift Gears in Understanding of Financial Reporting for SBOs
- Hit the Highway at Full Speed

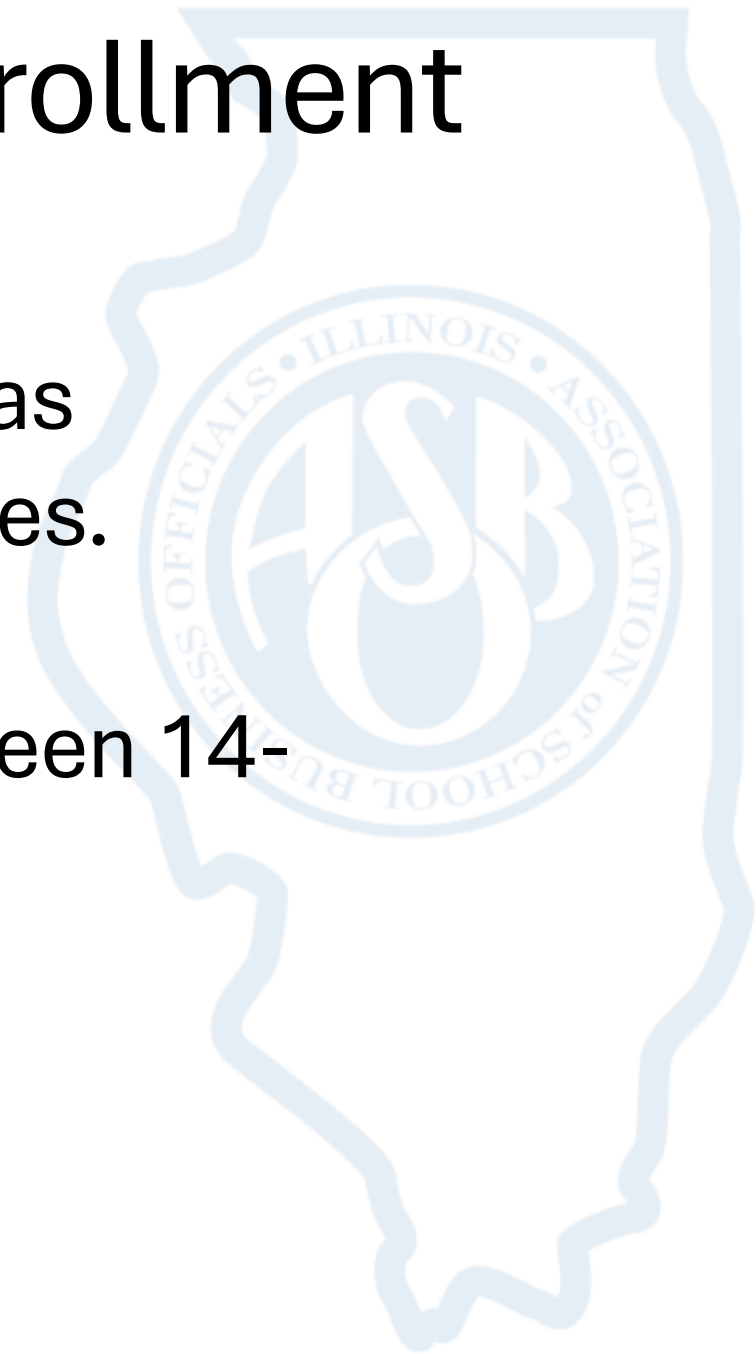


Developing Relationships: The World of Special Education in School Districts

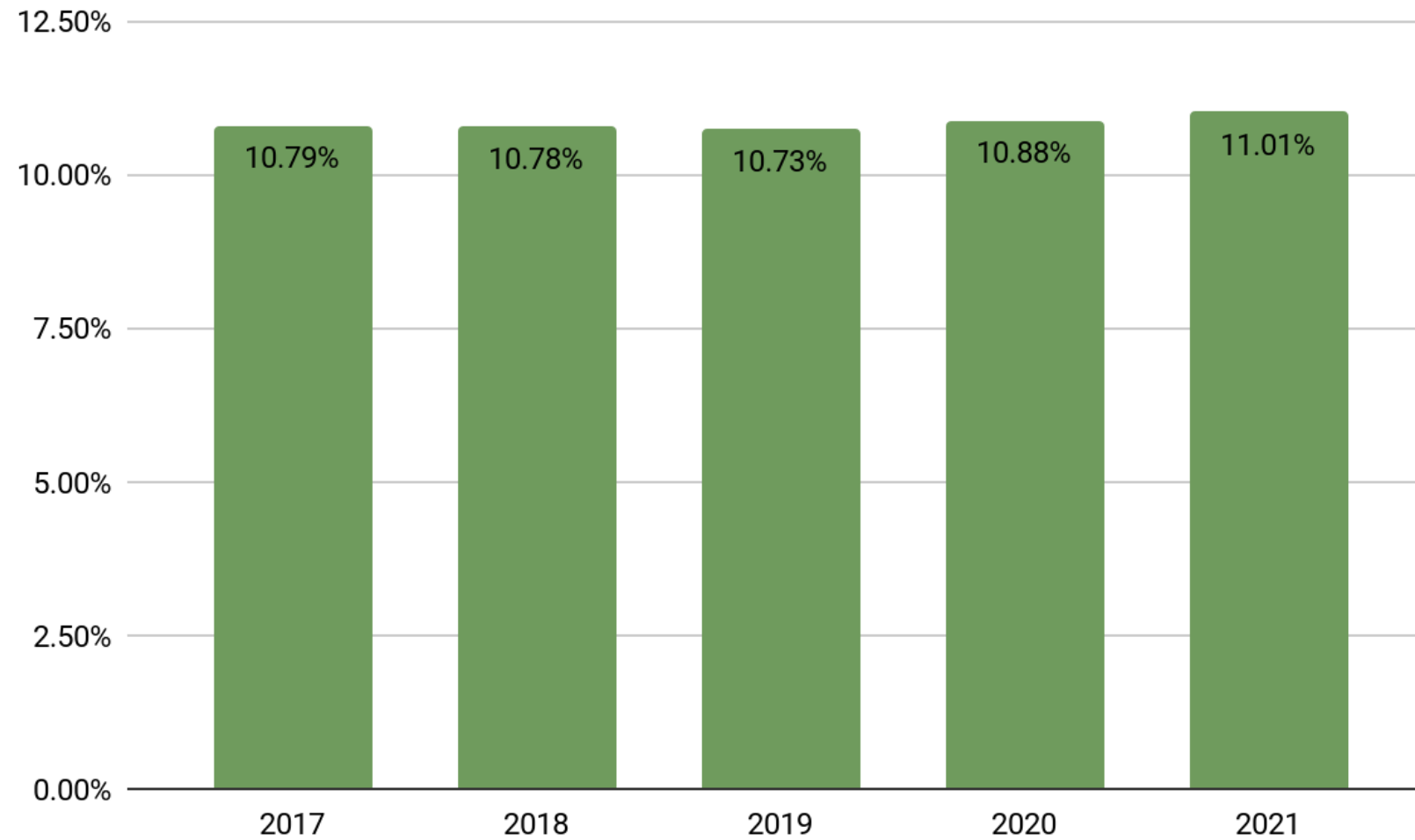


Percentage of Special Ed to Enrollment

- 2018-2019 about 15.05% of the enrollment was considered to receive special education services.
- The Range has maintained a consistency between 14-15% from 2003-2019



Percent of Special Education in Overall Budget- Average in Illinois



*Data from AFR & Comparative Analytics

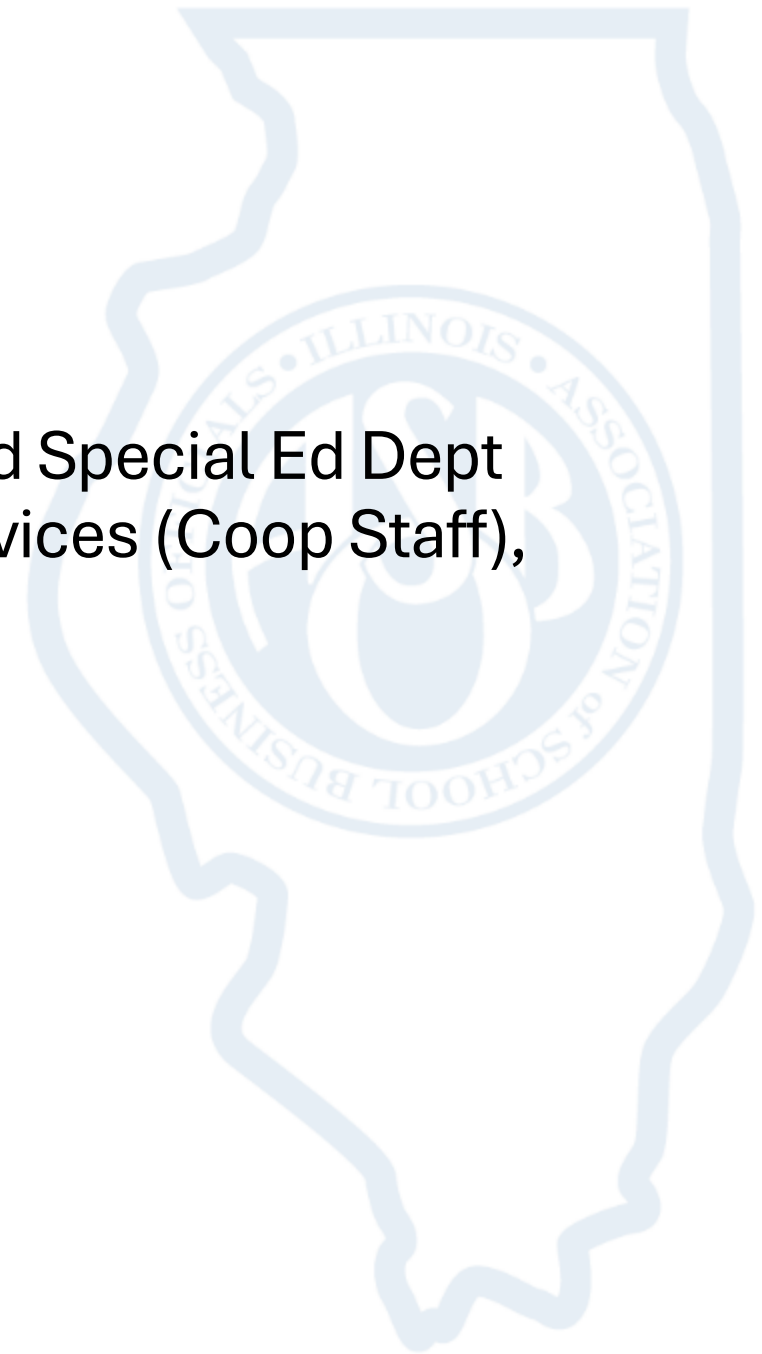
Role of Special Ed Director

- Oversee special education and iStar
- Roles vary from District to District
- Advocate for staff, students and families
- IDEA grants, medicaid reporting and student claims
- Develop education programs and policies
- Train and evaluate teachers
- Manage budget and grant monies for SPED Programs



Role of Cooperative

- Provide Services and Programs for school districts
- Coop SBO is the liaison with Member District Finance and Special Ed Dept
- Assists with Medicaid, SPED Transportation, Related Services (Coop Staff), Tuition (Students), IDEA Grant, Excess Cost, MOE, etc.
- Resource for Districts

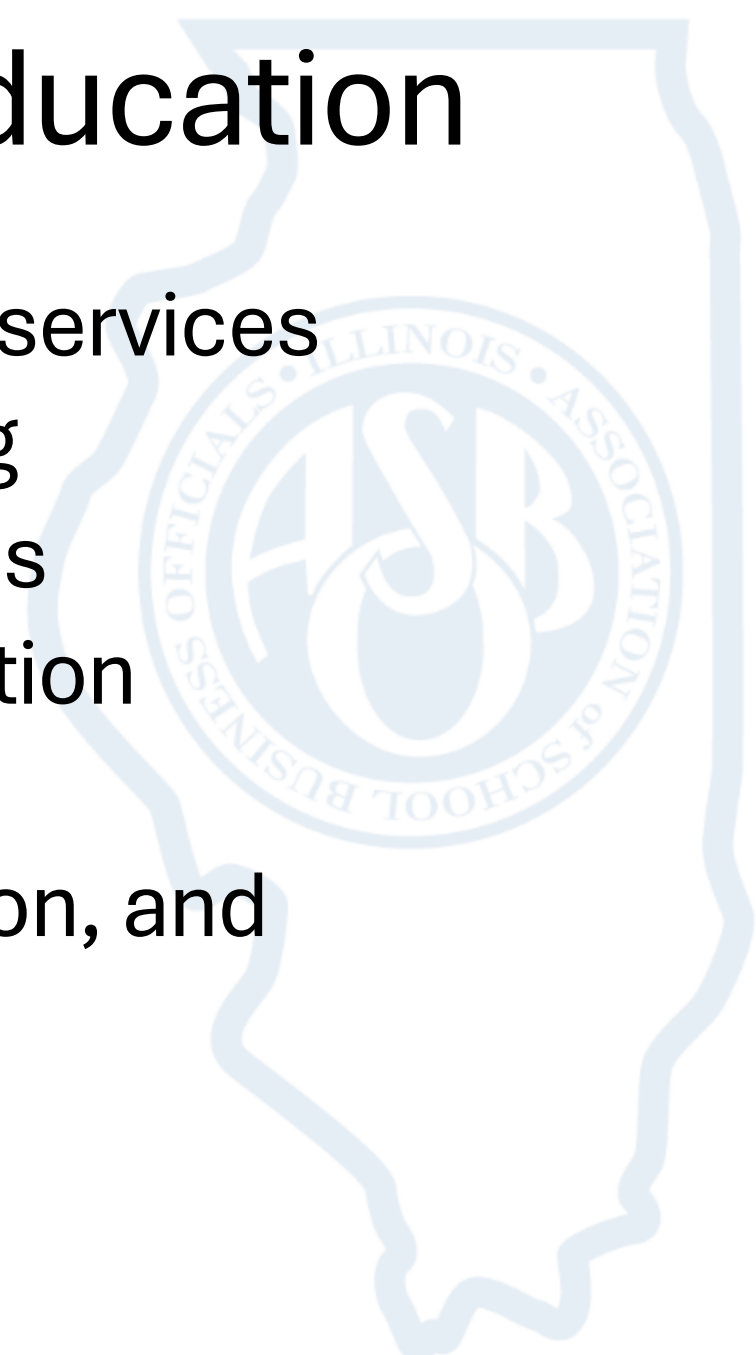


Shifting Gears: The Role SBO Plays in Special Education



Role CSBO Plays in Special Education

- Providing resources to support instruction and services
- Checks/Balance to SPED Director for Spending
- Guidance in allocating appropriate expenditures
- Collaborating on Special Education Transportation Services
- Facilitator or Lead on Financial Reporting, Tuition, and Reimbursements



IWAS

- Obtain Access for these systems IWAS
 - Excess Cost
 - IDEA Consolidation Part B Application
 - Expenditure Reporting
 - Organizational Risk Assessment
 - Grant Periodic Reporting*
 - iStar
 - Other



ISBE

Finance, Budgets & Funding for Special Education Reimbursement



Private Facility Search

[ISBE Private Facilities Search](#)



FULL SPEED: Special Education Financial Reporting



Medicaid



MEDICAID Acronyms

- **PCG** - Public Consulting Group
- **MAC** - Medicaid Advisory Committee
- **MAC** - Medicaid Administrative Claiming
- **FFS** - Fee For Service
- **FFP** - Federal Financial Participation
- **HFS** - Healthcare and Family Services
- **QMP** - Qualified Medical Provider
- **SBHS** - School-Based Health Services
- **RMTS** - Random Moment in Time Study
- **CMS** - Center for Medicare and Medicaid Service



MEDICAID

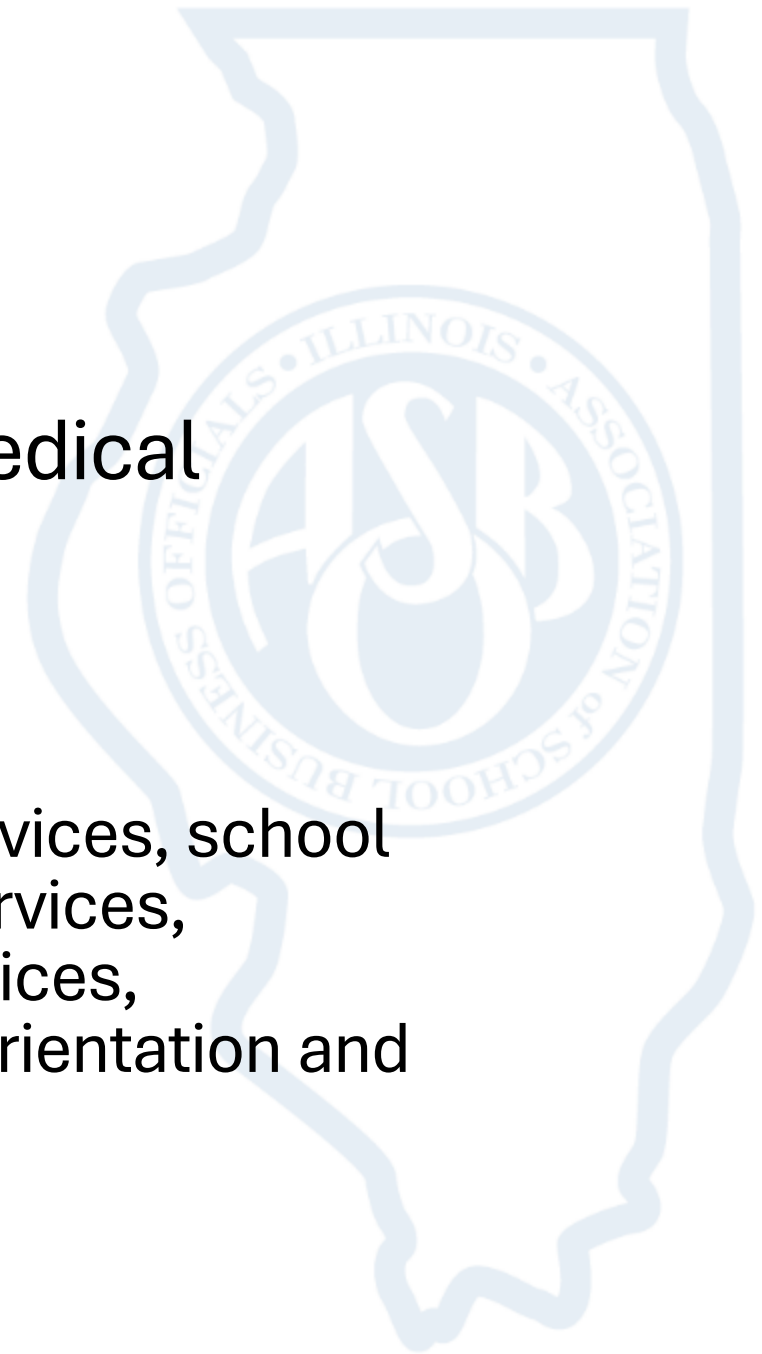
- Administrative Claiming (MAC)
 - Access for PCG
- Fee For Service (FFS)
 - Work with your FFS Vendor in tracking minutes



MEDICAID

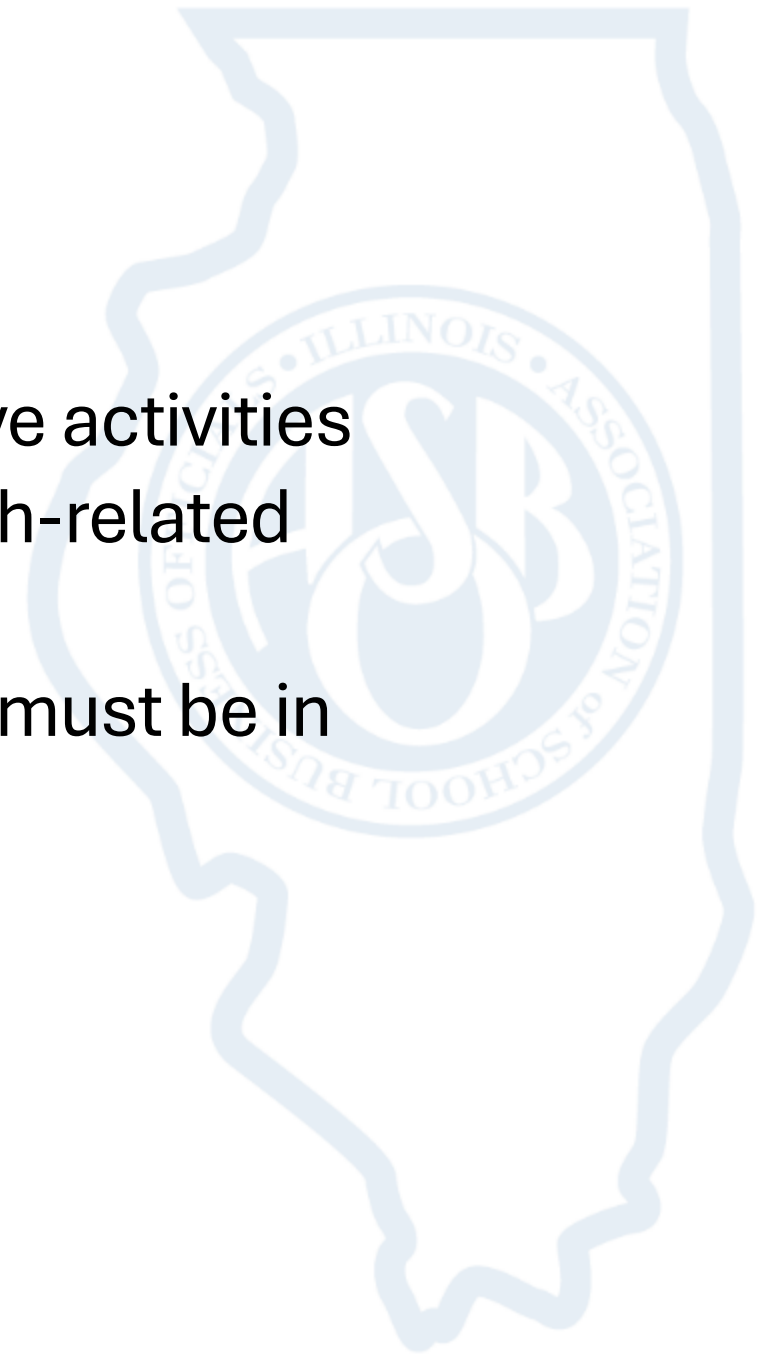
- Fee For Service (FFS)
 - Federal medicaid reimbursement for direct medical services

Speech, physical therapy, occupational therapy, nursing services, school health aides, hearing and vision screening, social worker services, psychological services, counseling services, audiology services, specialized transportation, developmental assessments, Orientation and Mobility and Applied Behavior Analysis



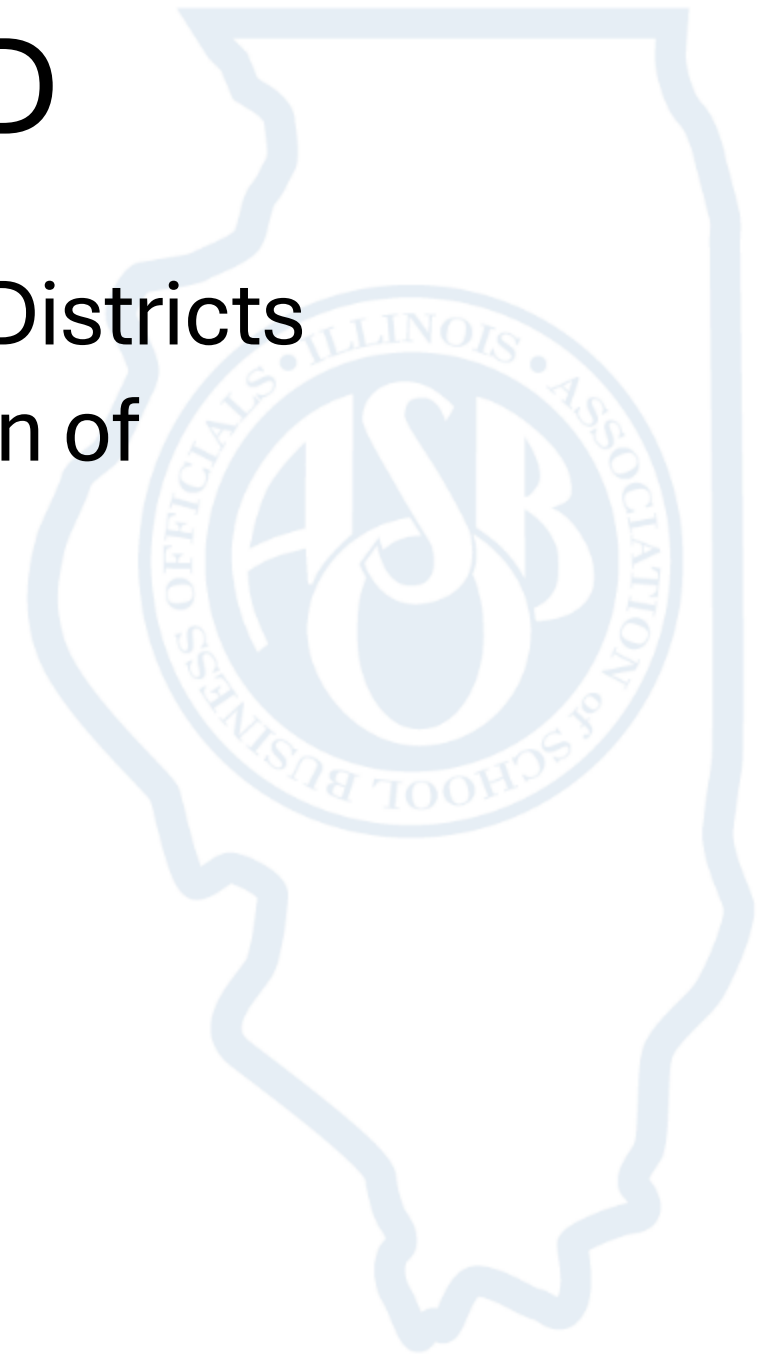
MEDICAID

- Administrative Claiming (MAC)
 - Federal Medicaid Reimbursement for administrative activities associated with linking students to Medicaid/health-related services
 - This includes the Random Moment of Time Study (must be in compliance to get funding)
 - Submit this report on a quarterly basis



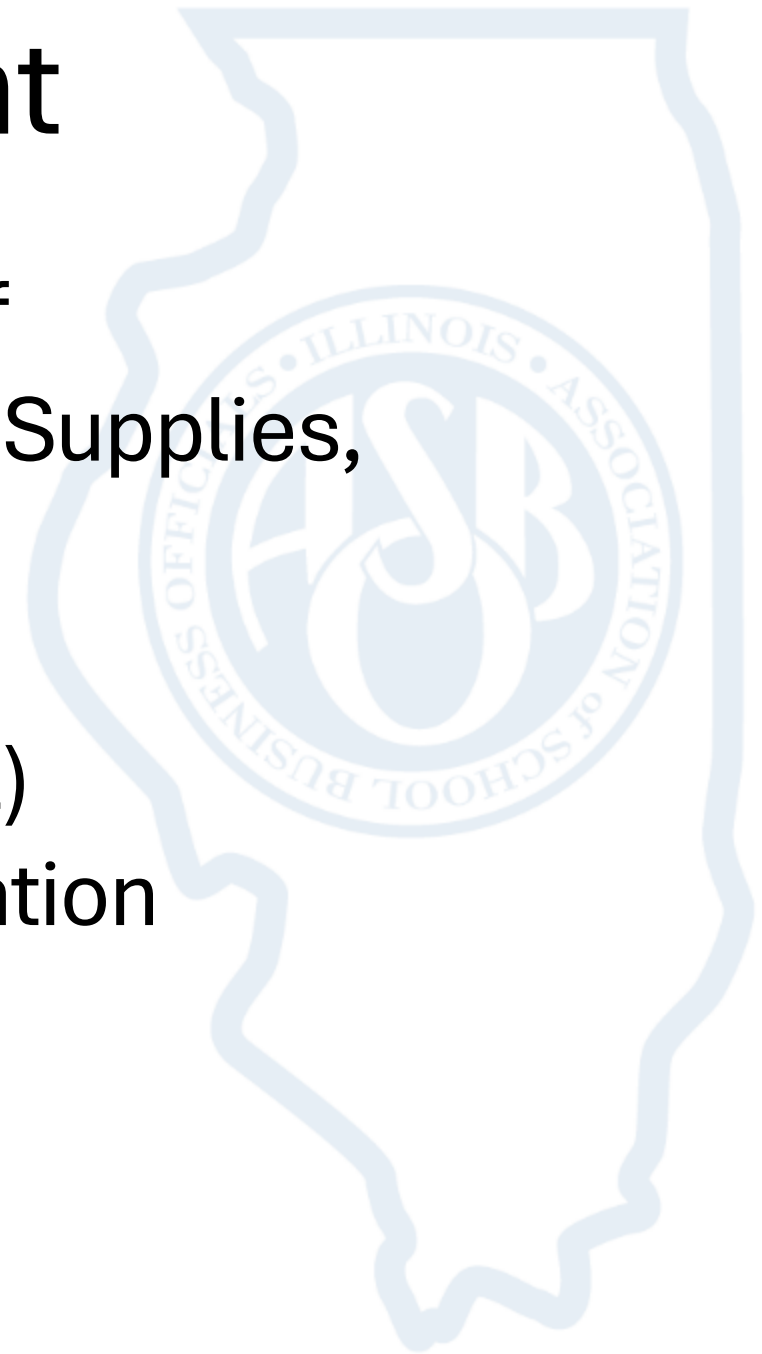
Expansion in MEDICAID

- State Plan Amendment (SPA) approval allows Districts can claim reimbursement on a wider population of students and services
- 504 Students (Not just IEP Students)



Annual Cost Settlement

- Collection of your Quarterly Financials for Staff
- Annual Expenditures for Direct Medical Costs (Supplies, Materials, Non-Cap Equipment)
- Capitalized Equipment (Over 5,000)
- Transportation Costs (In-House vs Contractual)
- Specialized vs Not Only Specialized Transportation
- Desk Review



MEDICAID Resources

- [Healthcare and Family Services](#)
- [Chapter U-200 \(HFS\)](#)
- [School Based Health Services Home](#)
- [NPI Record Search](#)
- [Illinois Medicaid School-Based Health Services \(SBHS\)](#)
- [Program Changes FAQ](#)
- [PCG CLAIMING SYSTEM: Illinois School-Based Health Services \(SBHS\) Program](#)

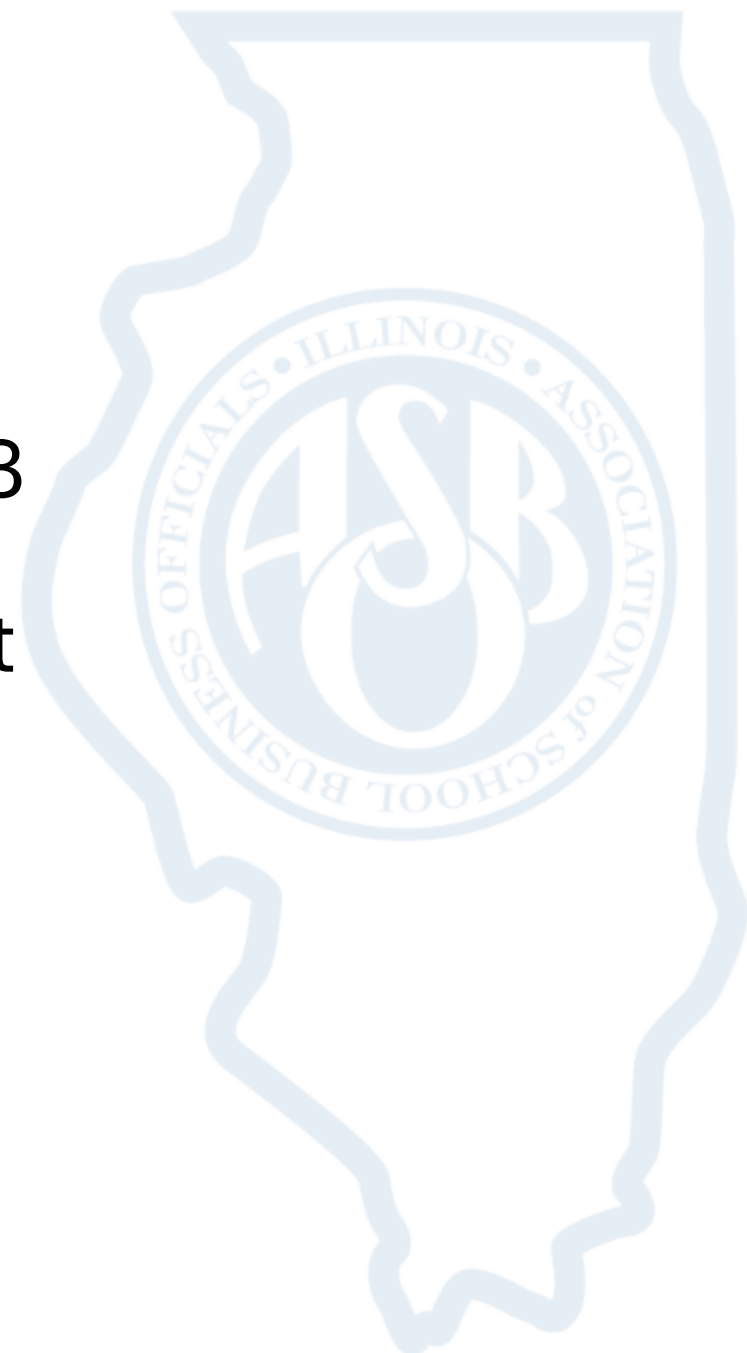


IDEA



IDEA Acronyms

- **IDEA** - Individuals with Disabilities Education ACT
- **IEP** - Individualized Education Plan
- **504** - Section 504 of the Rehabilitation Act of 1973
- **ADA** - Americans with Disabilities Act of 1990
- **GATA** - Grant Accountability and Transparency Act
- **MOE** - Maintenance of Effort
- **CSFA** - Catalog of State Financial Assistance
- **FAPE** - Free and Appropriate Public Education
- **LRE** - Least Restrictive Environment
- **SAM** – System for Award Management
- **TMC** – Timely and Meaningful Consultation



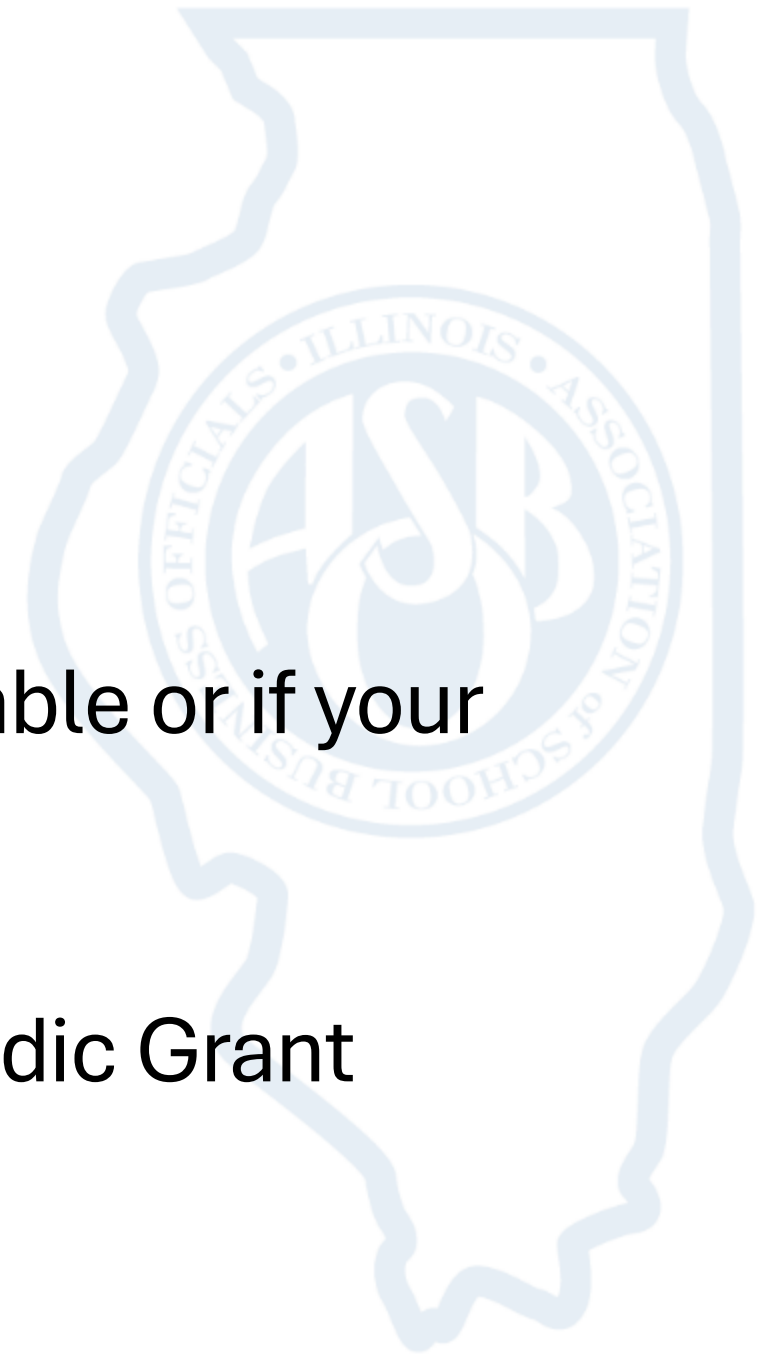
IDEA

- IDEA Consolidation Part B Application
- Excess Cost
- Maintenance of Effort



IDEA

- IDEA Consolidation Part B Application
 - Be sure to have a July 1st start date
 - Amend your grant if more funds become available or if your expenditures exceed 10% or \$1,000
 - Ensure your expenses are allowable
 - Complete quarterly expenditure report & Periodic Grant Reporting



IDEA Resources

- [ISBE IDEA Part B](#)
 - [IDEA Program Grant Guide](#)
 - [Periodic Performance Grant Reporting Form](#)
 - [Illinois Funding and Disbursements Policy and Procedures](#)
 - [CEIS Guidance](#)
 - [Mandatory CEIS vs. Voluntary CEIS](#)
 - [MOE AFR Reference Sheet](#)
 - [IDEA Part B Grant Program Information](#)
 - [Excess Cost ISBE Powerpoint](#)

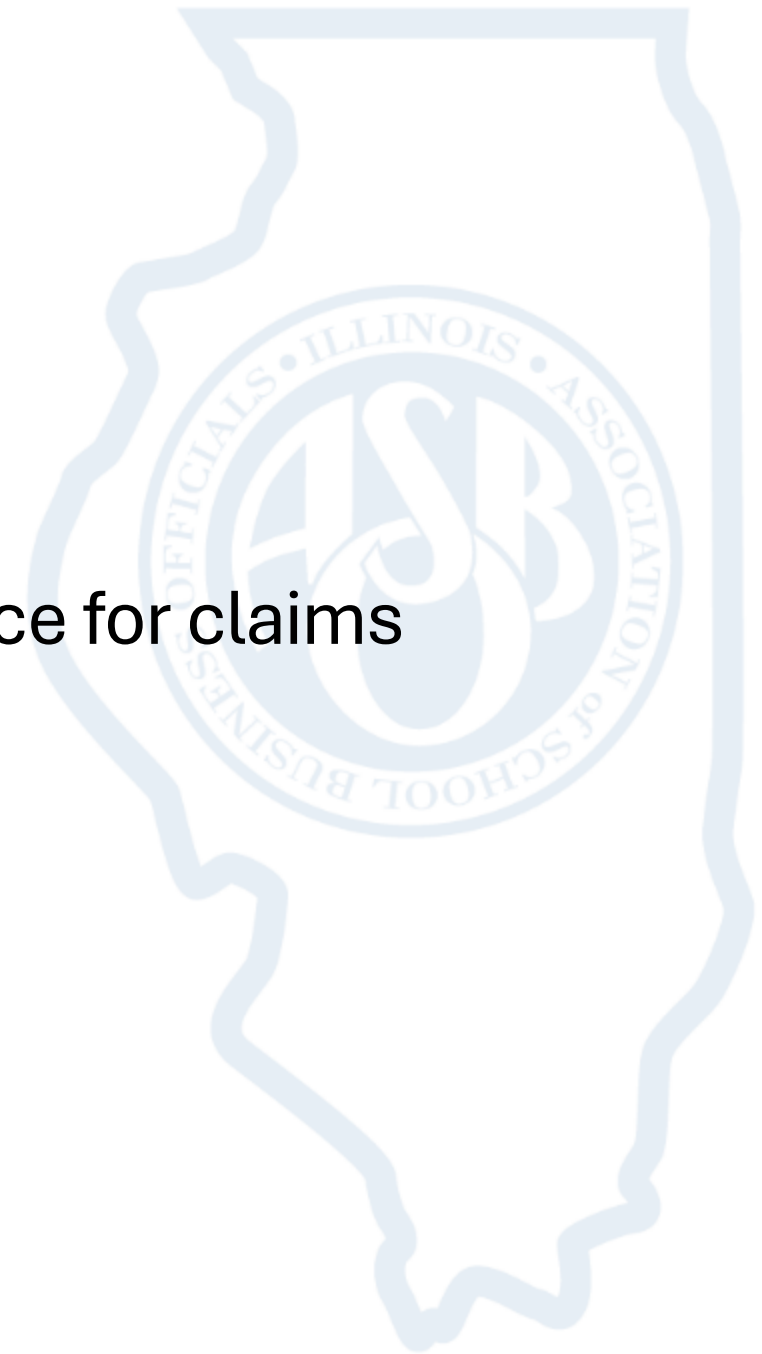


Claims



Claims Acronyms

- **MCAT** - Mandated Categorical Program
- **IPCRB** - Illinois Purchased Care Review Board
- **FRIS** - Financial Reimbursement Information System
- **HBUG** - Harrisburg Project - support of iStar and resource for claims



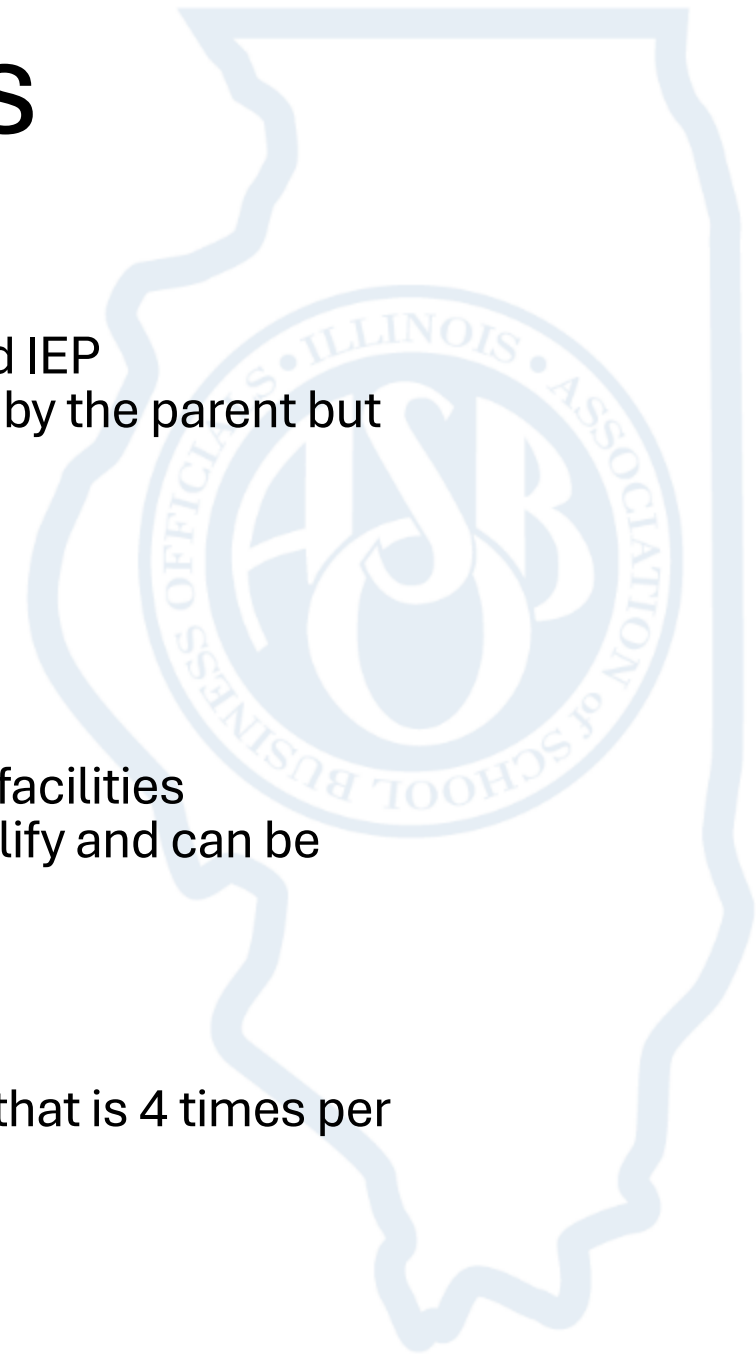
Special Ed Fund Codes

Fund Code

- **A- IDEA Child Count**-Eligible and enrolled and have an appropriately developed IEP
- **K- Nonpublic-dually enrolled**- Home-schooled or enrolled in a private school by the parent but also enrolled in a public school for IEP services
- **L- Nonpublic-not enrolled**
- **P- Homeschooled-not enrolled**
- **N- Nonpublic school students no receiving services**

Fund Reimbursement Codes

- **B-Private and Residential Facilities**-students that attend approved nonpublic facilities
- **D/E-Orphanage Act**-provides full reimbursement for eligible students who qualify and can be verified in the Youth in Care Report (DCFS)
- **F-Orphanage Act**- but for students in private facilities
- **H-Philip J. Rock Center**
- **J-Private Residential facility/Public School District Education Program**
- **X-Funding for Children with Excess Cost**-tuition reimbursement for students that is 4 times per cap



CLAIMS

- Special Education Transportation
 - Due August 15th
- Private Facilities (Fund Code B)
 - Due August 15th
- Orphanage/Youth in Care (Fund Code D, E, F)
- Excess Cost (Fund Code J, X)
 - Due July 31st



Claims Resources

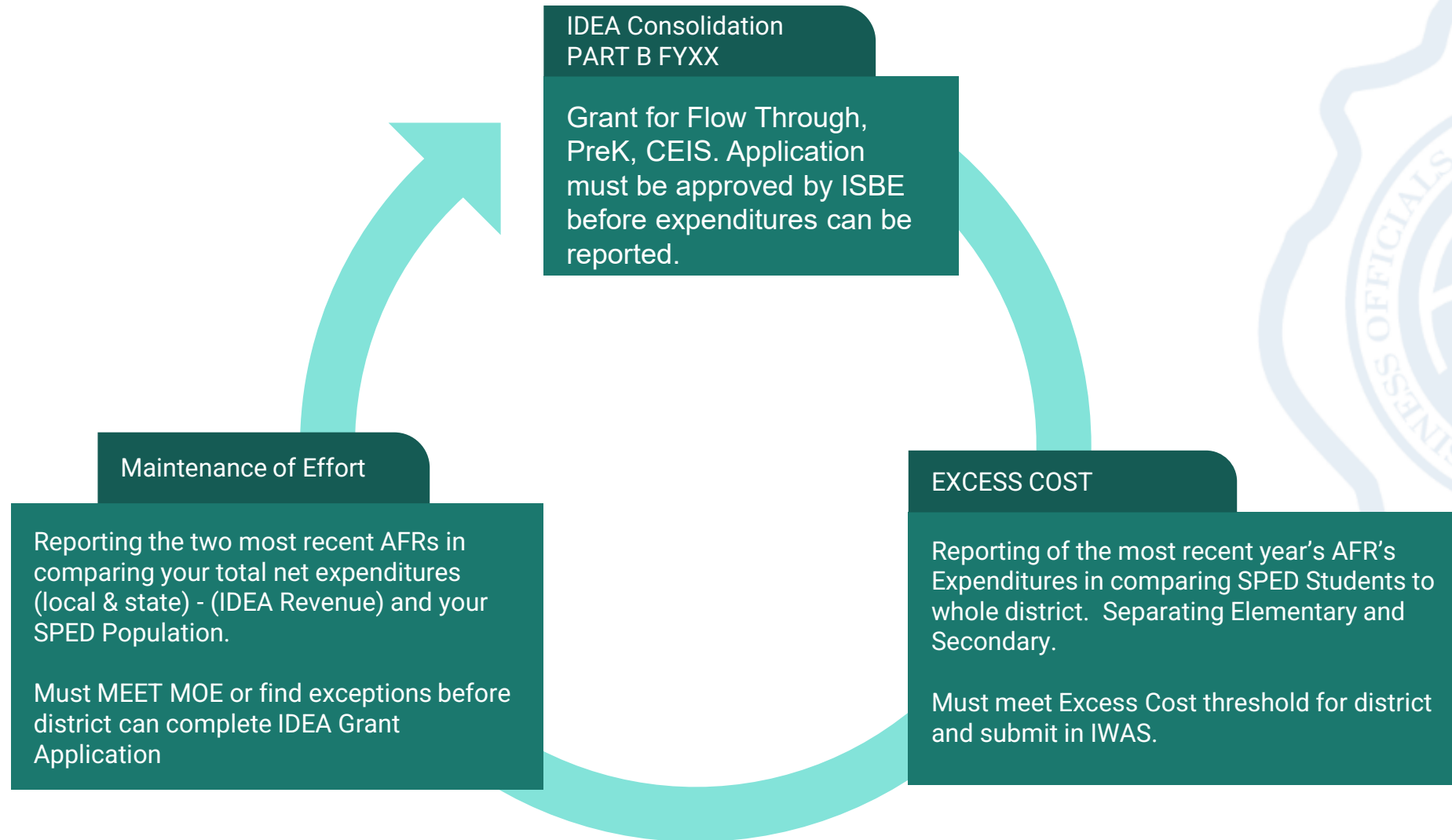
- Illinois Purchased Care Review Board
- Special Education Reimbursement (ISBE)
- Harrisburg Project
- FRIS



Maintenance of Effort & Excess Cost



MOE & Excess Cost



MOE Vs. Excess Cost

- MOE focuses on spending of Special Education for last two previous years (Most Recent AFRs)
- Meeting MOE focuses on local and state spending
- MOE Compares Budgeted vs Actual Costs of SPED Students
- MOE Calculates all SPED Students
- Excess Cost expenditures evaluate average student costs of SPED Students and identifying sources other than IDEA with the whole district.
- Meeting Excess Cost threshold considers qualified federal spending
- Excess Cost compares the minimum spending amount compared to the actual costs
- Excess Cost calculates Elementary (K-8) and Secondary (9-12) separately

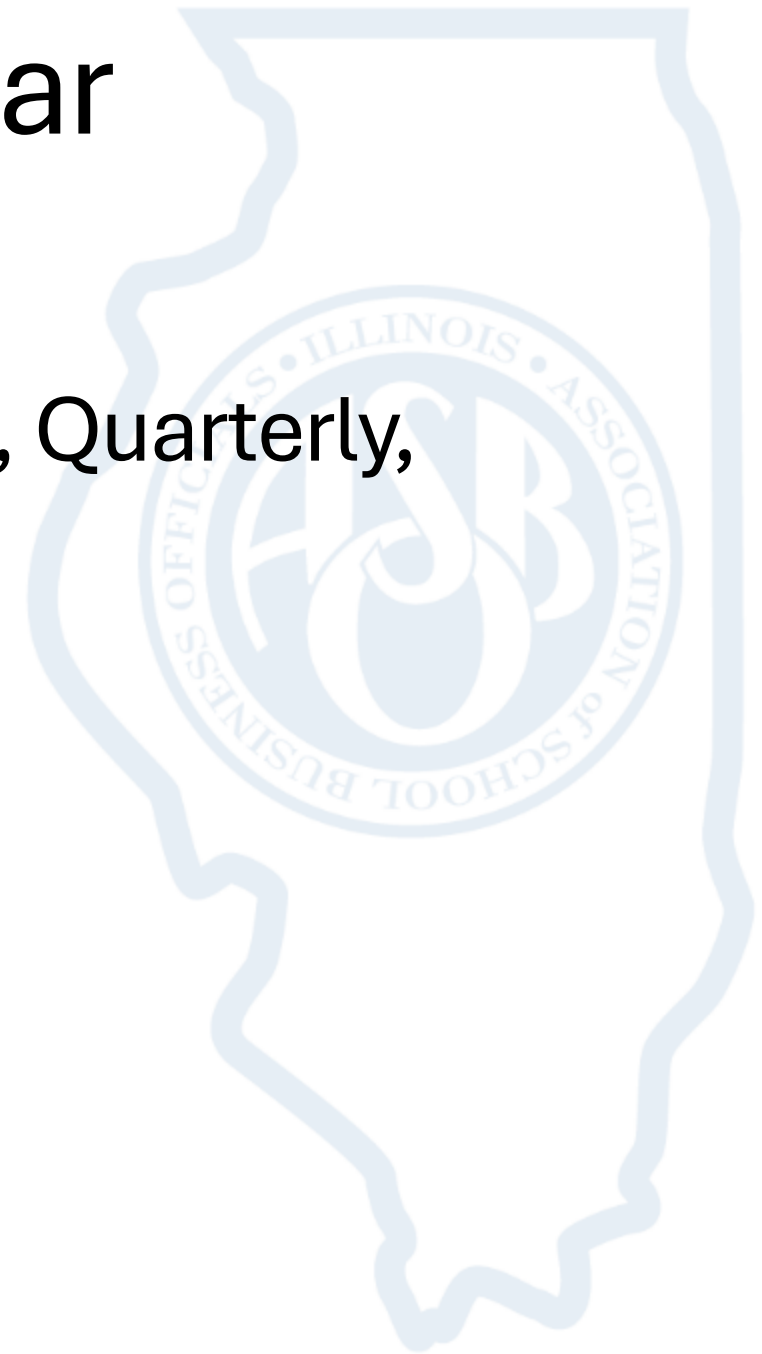
MOE & Excess Cost Resources

- [Differences of MOE and Excess Cost](#)
- [MOE and IDEA Part B FAQ](#)
- [ARF Reference Sheet](#)
- [IASBO Online: MOE MONEY, MOE PROBLEMS](#)



Cruising Through The Year

- Continue to help navigate your SPED Director
- Don't Stall on your Financial Reporting (Annual, Quarterly, and One-Offs)
- Maintain Your Speed on the SPED Highway



Questions and Answers

We thank you for your time!



Presenters

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