

Opening the Black Box of Special Education Finance

April 29, 2026

8:00 AM to 9:30 AM

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Introductions

Heather Lane (Moderator)

- *Assistant Business Manager*
Niles Township District for Special Education



Mark Altmayer (Speaker)

- *Chief Financial Officer*
Huntley Community School District 158



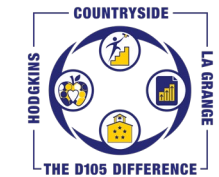
Maggie Gasior (Speaker)

- *Grants & Medicaid Supervisor*
Mundelein Elementary School District 75



Steven J Smidl (Speaker)

- *Director of Business Services/CSBO*
La Grange School District 105



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Presenters:

MODERATOR INFO:

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What is the Black Box?

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Agenda:

- Building a Relationship with Special Education!
- Medicaid
- Workload & Caseload Management
- Legal Fees! What you need to Know!
- Special Education Claims
- IDEA Grants
- Questions?

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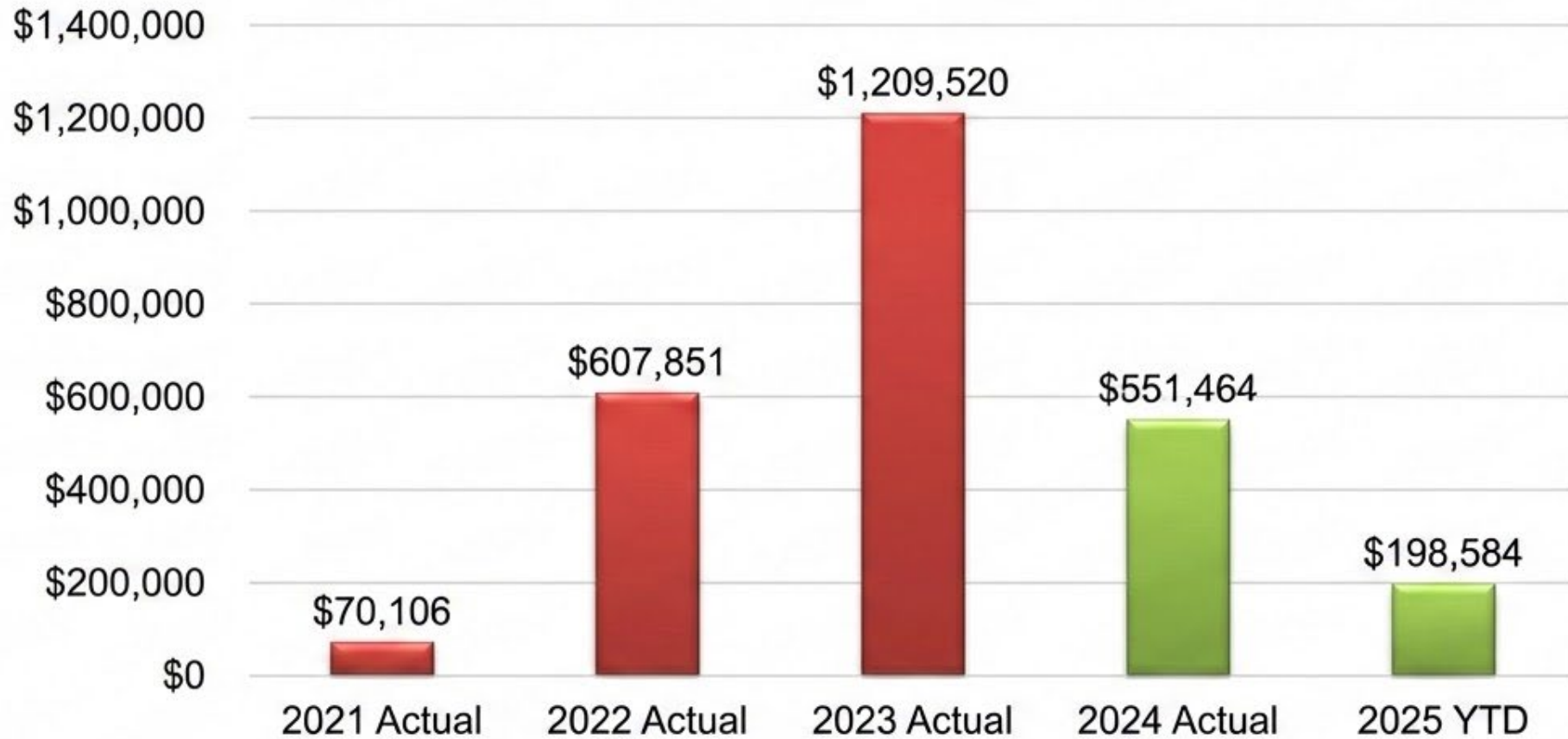
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SPED Contracted Services



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Medicaid

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Fee for Service/Cost Settlement – Opportunities

- Open the box and start “working” with SPED!
- Identify your Medicaid Eligible Students
 - Know your number!
 - Check Name Configurations Against the HFS Medi System - Challenge your Medicaid claiming admin! Free & Reduced List
- Identify Staff
 - Related Services Staff
 - 1:1 Aides (Schools & Private Facilities), Nurses, Audiologists, etc.
 - Contracted Related Services
- Use a Medicaid Vendor
- Create Oversight & Accountability!
 - Caseload & Workload
 - Recording of Sessions
 - IEP Minutes – Is your Staff Meeting their Minutes?



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The feeling before
Medicaid presentation...

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The feeling after Medicaid presentation



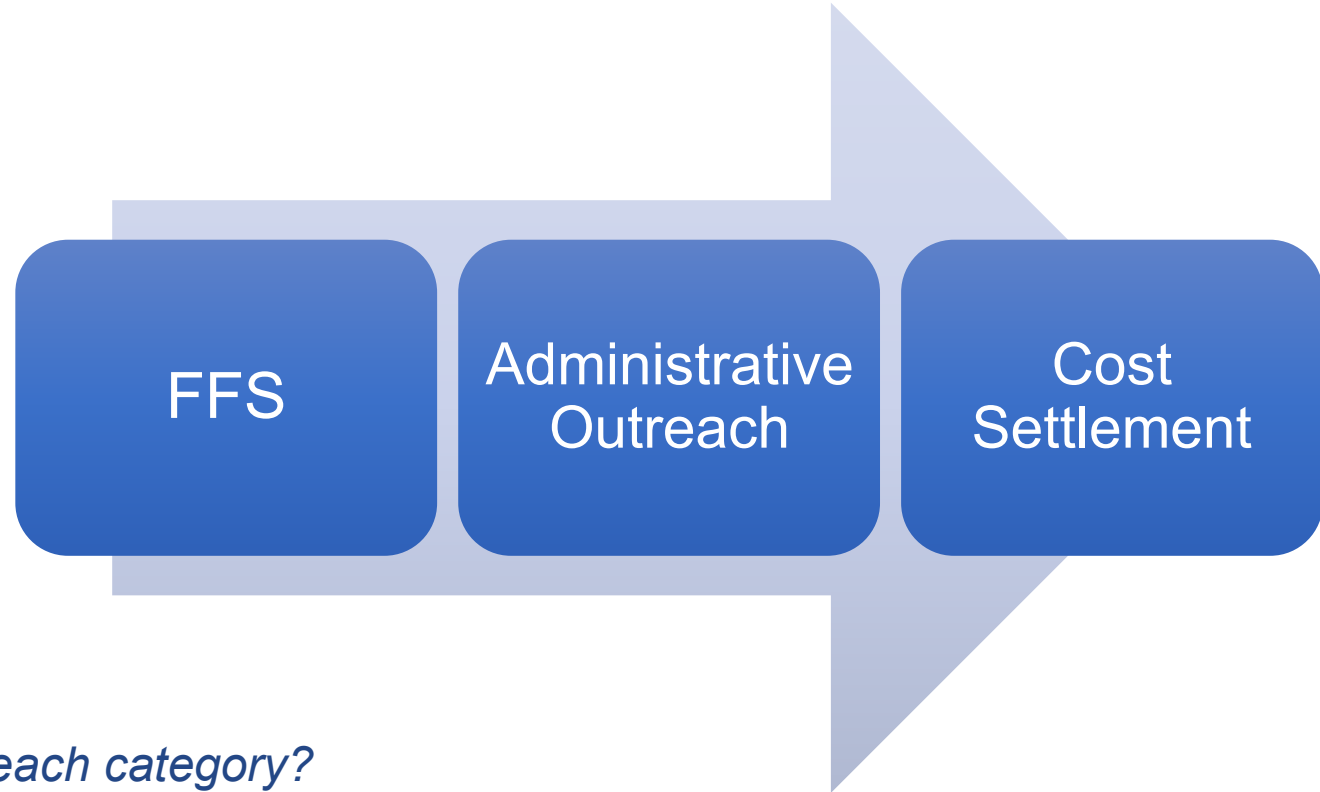
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School-Based Health Services Program

Revenue Streams



Q: What is your district's revenue in each category?

Q: Who is keeping track of the revenue?

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Fee-for-Service Components

1

PARENTAL CONSENT

- Written signature required on file for reimbursement
- Services are free and not “taking away” personal coverage
- IEP services must be provided regardless of Medicaid consent

2

DIRECT SERVICES

- Cost Pool 1 and Cost Pool 3
- Student has a Plan: IEP, 504 or Healthcare Plan
- Direct therapies are provided and documented within 180 days from the DOS

3

INTERIM PAYMENTS

- Received throughout the year for each calendar quarter
- Review 3790B Form for services provided, billed, rejected, paid
- Review the Remittance Advice for rejection codes 4992 - Medicaid Matching Funds: Fee-for-Service on AFR

Administrative Outreach Components

1

COST POOL LISTS

- Direct Services Personnel
- Administrative Services Providers only
- Other Direct Service Personnel - SCHOOL HEALTH AIDES

2

RMETS

- Staff captured in Staff Pool List may receive a moment
- Time response - 2 school days or 48 hours (best practice-SAME DAY)
- Participation compliance set at 85% and it affects Cost Settlement

3

QUARTERLY REPORTING

- District submit eligible costs for salaried and contracted staff in SPL
- MAC Claims are reviewed and calculated
- CPE Form signed

4

QUARTERLY PAYMENTS

- Four Quarters payments : JJ, JD, JM, AJ
- PCG - HFS - IL Comptroller vouchers
- 4991 - Medicaid Matching Funds: FFS on AFR

Administrative Outreach

- FEDERAL reimbursement to state and local agencies for activities related to the administration of the State's Medicaid plan
- Claims submitted through PCG during quarters: JJ, JD, JM, AJ.
- Reimbursement for:
 - Medical and health related outreach
 - Case management
 - Admin activities related to delivery of services
- Generated by staff included in Staff Pool List who respond to RMTS.
 - Direct Service Personnel
 - Administrative Service Providers only
 - Other Direct Service Personnel (School Health Aides performing ADLs)

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Cost Settlement Components

1

ANNUAL EXPENDITURES

- Annual tab in PCG: Direct Service Costs Summary
- Other Plans of Care Total Costs Summary
- Quarterly financial data rolls into the Annual Cost Report by service
- This is where you will see continuum of each position during SY.

2

CALCULATION

- Allowable cost based on expenses entered in PCG during SY
- Interim payments based on actual FFS payments received during SY
- CPE Form signed

3

PAYMENT / RECOUPMENT

- Total Medicaid Expenditures is the ALLOWABLE COST
- Medicaid Interim Payments district received
- Medicaid Cost Settlement - LUMP SUM payment or recoupment

Salary & benefits reporting

Exclude:

- Mileage reimbursement
- Professional Development stipends
- Lunch supervision
- Clubs/Athletics coaching
- Tuition reimbursement
- Cell phone reimbursement
- Federal Funds salary and benefits

salary \$23,897.50 benefits \$721.16

SUBS SICK CS		\$1,855.00	10-1110-120-04-CSBO
SUBS PERSONAL CS		\$105.00	10-1110-121-04-CSBO
MEEA Tier A - General Supervision/Internal S		\$665.00	10-1110-131-04-CSMS
Certified Salary - Spec Ed		\$23,827.50	10-1205-112-04-CSBO
Subs Spec Ed		\$70.00	10-1205-125-04-SPED
At Risk & RTI Subs - CS		\$35.00	10-1280-125-04-SPED
ASSIST COACH Tier A-BASKETBALL		\$2,100.00	10-1501-137-04-CLUB/SPORT
ASSIST COACH Tier A-VOLLEYBALL		\$2,100.00	10-1503-137-04-CLUB/SPORT
Principal Directed Prof Dev Subs		\$140.00	10-2210-125-04-CSMS
Stipends		\$0.00	10-2210-130-00-4932-TITLE IIA
Stipends - Training		\$742.50	10-2210-132-00-CURR
MEEA Tier A - Lunch Duty		\$1,215.15	11-2560-131-04-CSMS
Life Ins LD CS	LIBP	\$6.57	10-1205-221-04-CSBO
Medicare	MR	\$25.66	50-1110-214-04-CSBO
TIER A-GENERAL SUPERVISIO (MR)	MR	\$8.80	50-1110-214-04-CSMS
Certified Salary - Spec E (MR)	MR	\$312.27	50-1205-214-04-CSBO
Subs Spec Ed (MR)	MR	\$0.91	50-1205-214-04-SPED
At Risk & RTI Subs - CS (MR)	MR	\$0.46	50-1280-214-04-SPED
HEAD COACH Tier A-BASKETB (MR)	MR	\$28.48	50-1501-214-04-CLUB/SPORT
HEAD COACH Tier A-VOLLEYB (MR)	MR	\$28.55	50-1503-214-04-CLUB/SPORT
Medicare	MR	\$0.84	50-2210-214-00-4932-TITLE IIA
Curriculum Review Leader (MR)	MR	\$9.95	50-2210-214-00-CURR
Prof Dev Subs (MR)	MR	\$1.82	50-2210-214-04-CSMS
Lunch Supervision (MR)	MR	\$15.92	50-2560-214-04-CSMS
Certified Salary - Spec E (THB)	THS ER	\$215.16	10-1205-217-04-CSBO
THIS	THS ER	\$3.16	10-2210-217-00-4932-TITLE IIA
Curriculum Review Leader (THS)	THS ER	\$1.81	10-2210-217-00-CURR
Certified Salary - Spec E (TRB)	TRS ER	\$186.25	10-1205-211-04-CSBO
TRS - FED. Grant - Subs	TRS ER	\$2.74	10-2210-211-00-4932-TITLE IIA
Curriculum Review Leader (TRS)	TRS ER	\$1.57	10-2210-211-00-CURR
	Total Charged	\$33,706.07	

What Services does Medicaid cover?

- Audiology Services
- Nursing Services
- Occupational Therapy
- Physical Therapy
- Psychological Services
- Speech/Language Services
- Social Work Services
- School Health Aides
- Screenings/Evaluations
- Specialized Transportation



Q: Do you have all staff captured in Staff Pool List?

Q: Who tracks staff changes and updates SPL in PCG?

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What Services does Medicaid cover?

Coverage

- Eligibility: children under 21 for covered services that are medically necessary for development of IEP/IFSP or fully documented in IEP/IFSP
- Billing: The billing providers are the LEAs such as school districts and SPED co-ops.
- Districts work with their respective vendors that submit claims.

Nursing Services

- Covered as: professional services relevant to medical and rehabilitative needs, provided through direct service intervention or consultation including:
 - Medicaid administration and monitoring
 - Catheterization
 - Evaluations and assessments
 - Tube feeding
 - Suctioning
 - Monitoring health conditions
 - Providing information & recommendation care
- Providers eligible for Reimbursement
 - Licensed RN, LSN with Type-73 cert. or ISBE equivalent endorsement in school nursing

Behavioral Health Services

- Covered as:
 - Testing and Behavioral evaluations
 - Therapy & psychological services
 - Crisis Intervention
 - Social work services
- Providers eligible for Reimbursement:
 - Psych with Type-73 certificate or ISBE equivalent in school psychology
 - Licensed Psychologist
 - Psych Intern with ISBE approval under direction of qualified School Psych
 - Social Worker with Type-73 cert. or ISBE equivalent, endorsed in school work
 - SW Intern with ISBE approval under direction of qualified Social Worker

Medicaid Service Categories

Non-Prescribed Services

- Psychologist
- Social Worker
- Nursing
- Health Aide
- Hearing Screening
- Vision Screening

Q: Who refers students for services in your district?

Prescribed Services

- OT and PT - require PCP prescription
- Speech & Audiology - require referral from eligible provider (not self-referral)

Authorized to refer:

- Psychologist
- SLP (different from provider)
- Nurse

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RMTS Questions & Guide

1

Is the service you provided part of the child's medical plan of care where medical necessity has been otherwise established?

2

Who were you working with during this sample moment?

3

Describe in detail the activity you were performing during the sampled moment.

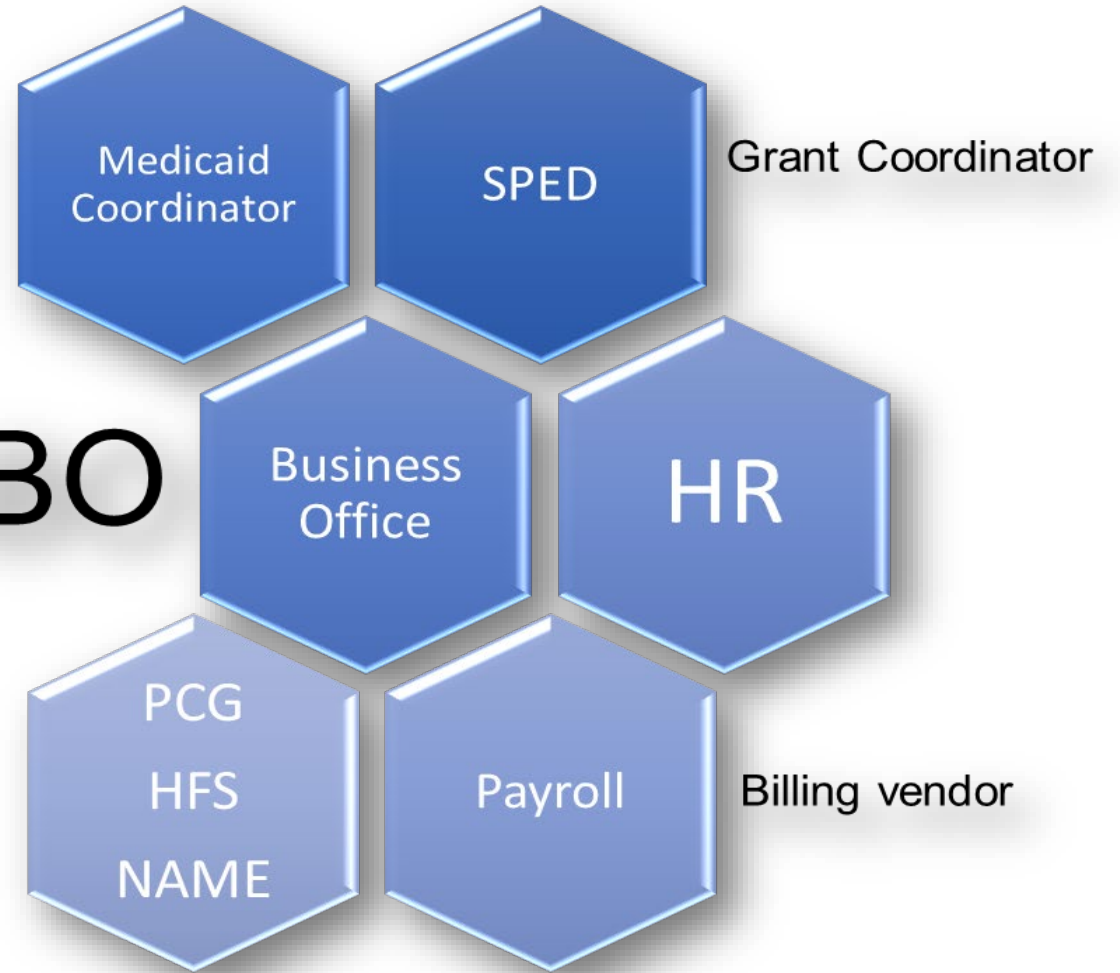
4

Describe in detail why you were doing this activity during the sample moment.

TEAM effort

Who is on your TEAM?

CSBO

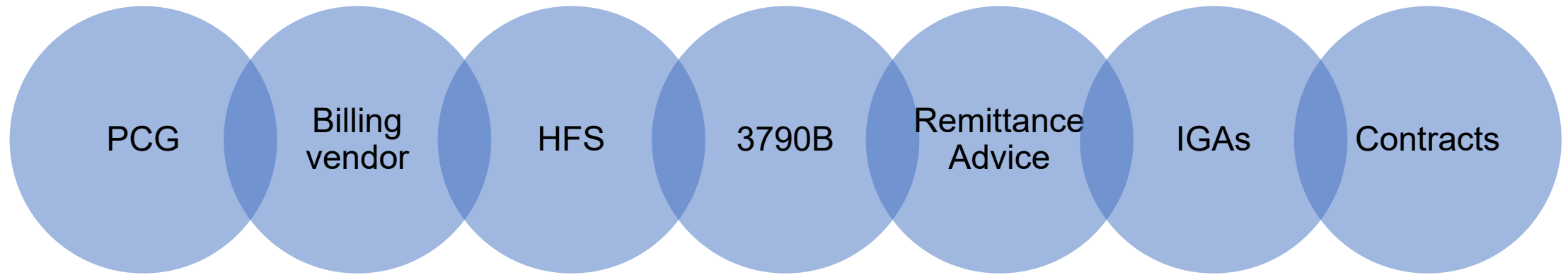


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Medicaid overview



“What you record today supports the services we can provide tomorrow.”

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Medicaid overview

Who reviews these docs?

Who monitors active enrollment in IMPACT?



Remittance Advice	<ul style="list-style-type: none">• Rejection Codes<ul style="list-style-type: none">• J66• J68
Forms	<ul style="list-style-type: none">• 3790• 3790B
IMPACT	<ul style="list-style-type: none">• District revalidation• Provider enrollment

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MEDICAID SYSTEM (MMIS)
 MARS SUBSYSTEM (M27679N)
 REPORT ID: 1BPEN571
 SEQUENCE.: PROVIDER ID,CATEGORY OF SERVICE

STATE OF ILLINOIS
 HEALTHCARE AND FAMILY SERVICES
 LEA QUARTERLY TOTAL COST SUMMARY REPORT
 QUARTER 10/01/22 THRU 12/31/22

RUN DATE: 01/14/23
 RUN TIME: 23:07:05
 PAGE: 625

PROVIDER ID: 366005127002
 PROVIDER: HUNTLEY COMMUNITY SCHOOL DISTR
 ADDRESS: 650 ACADEMIC DR
 CITY: ALGONQUIN IL 60102-4423
 COUNTY:

PROVIDER TYPE 047

PAYEE NUMBER: 3660051276014201
 PAYEE NAME: HUNTLEY COMMUNITY SCHOOL
 PAYEE ADDRESS: 650 ACADEMIC DR
 PAYEE CITY ST: ALGONQUIN IL 60102-44230

CATEGORY SERVICE	TOTAL SERVICES	TOTAL CLIENTS	TOT/AMT BILLED	SERVICES REJ	TOT/AMT REDUCED	TOT/AMT DEBIT	TOT/AMT CREDIT	TOT/AMT PAYABLE	FEDERAL MATCH
010 NURSIN	424	15	31,672.35	45	4,222.84	.00	4,495.58-	31,945.09	15,572.29
011 PT	177	29	7,078.94	48	6,092.53	.00	3,728.44-	4,714.85	787.34-
012 OT	111	66	5,647.46	65	7,852.36	.00	4,266.56-	2,061.66	2,943.13-
013 S/L/O	2,477	210	90,015.87	821	32,765.38	.00	4,431.99-	61,682.48	32,715.86
030 EPSDT	9	5	108.00	0	18.20	.00	.00	89.80	53.92
056 O/TRAN	3,359	231	74,502.62	284	8,370.41	.00	2,071.29-	68,203.50	39,155.92
058 SOCIL	1,303	191	36,317.83	146	6,193.57	.00	1,922.03-	32,046.29	17,209.38
059 PSYCHO	10	58	615.05	3	1,184.01	.00	1,050.21-	481.25	754.03-
093 IND PR	3,062	62	176,512.07	276	81,635.30	.00	72,043.83-	166,920.60	29,711.28
TOTALS	10,932	867	422,470.19	1,688	148,334.60	.00	94,009.93-	368,145.52	129,934.15

DATE	VOUCHER NUMBER	PAYABLE AMOUNT	DATE	VOUCHER NUMBER	PAYABLE AMOUNT	DATE	VOUCHER NUMBER	PAYABLE AMOUNT
10-18-22	2022291G259	.00	11-18-22	2022322E450	4,649.66	12-16-22	2022350E978	125,284.49
10-21-22	2022294F522	.00	11-29-22	2022333H114	.00	12-20-22	2022354J721	.00
10-25-22	2022298H447	.00	12-06-22	2022340J362	.00			
11-01-22	2022305H786	.00	12-13-22	2022347H959	.00			

DPA 3790B(N-1-02)



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PAYEE NUMBER 3660048686006002 PAYEE NAME COUNTY OF LAKE SCHOOL DIST 75
 MEDICAID PROVIDER NUMBER 366004868001 PROVIDER NAME MUNDELEIN ESD 75

PAYMENT SUMMARY OF FEDERAL FINANCIAL PARTICIPATION (FFP) FOR SCHOOL-BASED HEALTH SERVICES DISBURSED FOR STATE FISCAL YEAR 2025

(A)	(B)	(C)	(D)	(H)	(I)	(J)	(K)
MONTH/ FISCAL YEAR TO DATE SUMS BY QTR	FEE FOR SERVICE (FFS) FFP PAYMENT	QUARTERLY ADMIN CLAIM YTD TOTAL	TOTAL FFP PAID OR EARNED, FISCAL YEAR TO DATE (COLUMN(B) + COLUMN(C), 2ND ENTRY)	OUTSTANDING BALANCE RECOUPED THIS QTR	ADMIN ASSESSMENT	TOTAL ADMIN PAYMENT THIS QTR COLUMN(C), 1ST ENTRY - (COLUMN(I))	FISCAL YEAR TO DATE OUTSTANDING BALANCE DUE
JUL	12,964.04						
AUG							
SEP	4,156.78						
1ST	17,120.82	32,473.03					
QTR		32,473.03	49,593.85		1,298.92	31,174.11	
OCT							
NOV	8,738.26						
DEC							
2ND	25,859.08	751.99					
QTR		33,225.02	59,084.10		30.08	721.91	
JAN	15,051.31						
FEB							
MAR	17,096.10						
3RD	58,006.49	41,074.68					
QTR		74,299.70	132,306.19		1,642.99	39,431.69	
APR							
MAY	16,388.96						
JUN							
4TH	74,395.45	38,839.17					
QTR		113,138.87	187,534.32		1,553.57	37,285.60	

FISCAL YEAR TO DATE TOTALS**

4-MOST RECENT QUARTER CONTAINING PAID OR EARNED FFP BEGINNING FISCAL YEAR BALANCE DUE GRF \$0.00

** COLUMN(H) + COLUMN(I) + COLUMN(J) = COLUMN(C)
 TOTAL FISCAL YEAR TO DATE ADMIN PAYMENTS EQUALS TOTAL FISCAL YEAR TO DATE EARNED ADMIN FFP.)

*** ENDING FISCAL YEAR BALANCE DUE GRF (COLUMN(K) FOR 4TH QUARTER) FROM PREVIOUS FISCAL YEAR

THE AMOUNT(S) SHOWN IN COLUMN C REPRESENT THE FEDERAL AWARDS MADE EACH QUARTER AND FISCAL YEAR TO DATE BY THE DEPARTMENT OF HEALTH AND HUMAN SERVICES UNDER THE MEDICAL ASSISTANCE PROGRAM(MEDICAID,TITLE XIX),CATALOG OF FEDERAL DOMESTIC ASSISTANCE(CFDA) NO.93-778. IN GENERAL, IF A GOVERNMENTAL ENTITY EXPENDS AT LEAST \$500,000 OF FEDERAL MONIES (FROM ALL SOURCES, EITHER DIRECTLY OR INDIRECTLY, AS A SUBRECIPIENT) DURING ITS FISCAL YEAR, A SINGLE AUDIT IS REQUIRED IN ACCORDANCE WITH THE PROVISIONS OF OMB CIRCULAR A-133.

HFS 3790 (N-1-02)

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Medicaid resources

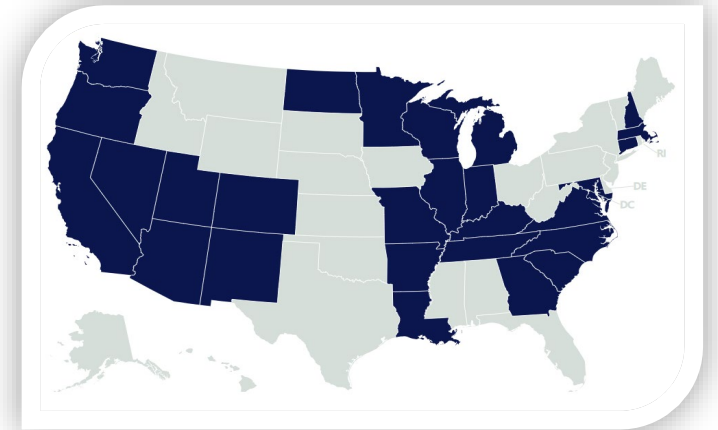
24th Annual NAME Conference

"Bringing the Spirit of School Medicaid to the Windy City"

➤ September 22–25, 2026 Chicago, IL [registration](#)



Illinois expanded its school Medicaid program in April 2023 to include services delivered to all Medicaid-enrolled students.



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Work Load & Caseload Management

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School-Based Support Roles: A Quick Guide

Role 	Primary Focus	Key Responsibilities in Schools
School Counselor	Academic, Social, Career & Emotional Growth	Short-term counseling, scheduling, academic planning, social skills groups, career guidance.
School Social Worker	Link Between Home, School, & Community	Crisis intervention, addressing trauma, connecting families to resources (food, housing, legal), improving attendance.
Occupational Therapist (OT)	Functional & Physical Performance	Fine motor skills (handwriting), sensory processing, self-care (ADLs), environmental modifications, and assistive technology.
BCBA	Data-Driven Behavioral Support	Conducting Functional Behavior Assessments (FBA), creating Behavior Intervention Plans (BIP), training staff, intensive behavioral intervention.

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Work Load

*Illinois Admin Code 226.735 Work Load for Special Education

Work Load Plan is designed to allow:

- FAPE (Free and Appropriate Public Education) in the LRE (Least Restrictive Environment)
- Appropriate staff number to support the students' IEP

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Work Load vs. Caseload

Caseload is the number of students with IEPs assigned to that teacher or specialist

Work Load is all of the responsibility required of the special education teacher and specialist to meet the needs of the students.

Work Load Plan

Plan should be based on:

1. Individual instruction time
2. Consultative services and collaboration
3. Attendance at IEP meetings
4. Paperwork and reporting

*Speech therapist caseloads shall not exceed 60 students

Considerations

- Needs of the students
- Meetings required (Evaluation, Re-evaluation & IEP)
- Direct and consult minutes
- Individual vs group
- Case management
- Other duties as assigned (supervision, team meetings, etc.)
- Travel
- Contractual hours

Legal Fees / Litigation!

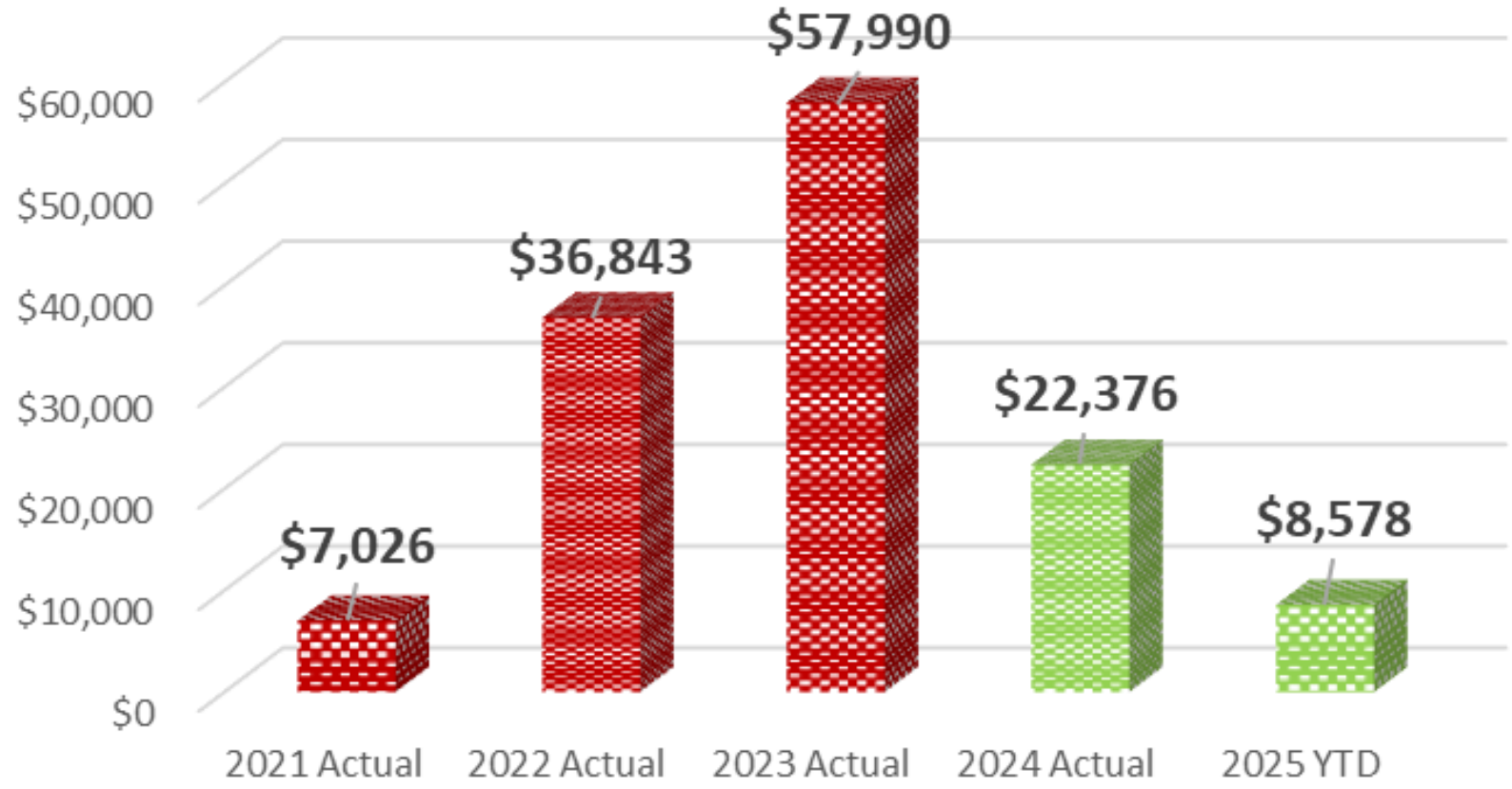
What you need to Know!

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SPED Legal Fees



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Common Legal Costs in Special Education

Disputes over:

Procedural Errors

Provision of FAPE (Free and Appropriate Public Education)

Disagreements about disciplinary recommendations

Professional development

General Consultation

Strategies to reduce legal fees:

Review legal costs with your Director of Special Education

Evaluate and respond to trends

Be proactive in your spending

Ensure Directors of Special Education have what they need!

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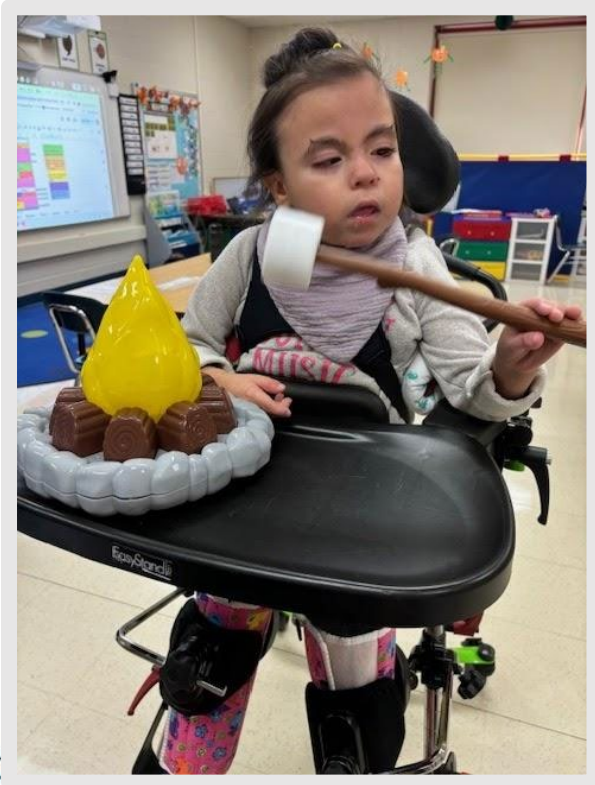
Special Education Claims

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“&” Special Education



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Special Education in Illinois

- 866 Districts
- 3,835 Schools
- 1.9 Million Students
- 16% with IEPs

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Educational Environment (EE)

% Students by Classroom Environment Within Total Population - 2024



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Educational Environment (EE)

Level	Educational Environment	2024
District	In Separate Facility	3.4%
	< 40%	14%
	40-79%	23.1%
	>= 80%	59.6%
State	In Separate Facility	6.7%
	< 40%	13.3%
	40-79%	25.6%
	>= 80%	54.5%

Private Facility Tuition Reimbursement

Provides reimbursement for a portion of the private facility tuition costs incurred by the district from the prior school year

Reimbursement Formula	
Reimbursement Level	Costs exceeding 2x the district per Capita cost

Private Tuition Claim Due: August 15th
Reimbursed Quarterly

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Private Facility Tuition Reimbursement Tips

- 1:1 Aides
- Auditing private facilities
 - Private facilities are assigned a daily rate by the Illinois Purchased Care Review Board
 - You cannot get reimbursed for more than the daily rate so check your bill
 - You can find this in iStar by searching Private Facility or more information at <https://www.isbe.net/Pages/Illinois-Purchased-Care-Review-Board.aspx>
 - Double check that start dates in IStar, Embrace/IEP software and the private facility all agree! Reimbursement can be lost if the start date in IStar is after the actual date at the facility.

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Federal Room & Board Reimbursement

District must have an approved ISBE Private Residential Placement Room & Board Reimbursement Form to transmit a claim

[Form 34-37: Application for Approval of Private Residential Placement](#)

Claims submitted monthly through I-Star

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Orphanage Reimbursement

Reimburses 100% of the current year tuition costs for eligible students with disabilities who are wards of the State under the guardianship of a public agency or who reside in state residential facilities. This includes regular term and summer term.

Reimbursement Formula

$$\text{Education Costs} + \text{Required Transportation} = \text{Reimbursement}$$

Regular Orphanage Tuition Claim Due: June 15th

STUDENTS MUST BE CODED CORRECTLY IN ISTAR BY MAY 15TH!!!!

Summer Orphanage Tuition Claim Due: November 1st

Reimbursed Quarterly

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Possible Youth In Care

This is a list of students that have been identified on a Department of Children and Family Services (DCFS) file provided to ISBE. These students may be either on this list, then they are currently not listed in the education data collection system as an orphanage student (i.e. Fund Code of E or F) or, they are in I-Star, but miscoded as not being an orphanage student (i.e. Fund Code of A or B) until you confirm with ISBE.

PLEASE NOTE: At this time ISTAR validation is only updated on a monthly basis, so new Fund E or F students may not be approved until the end of the month or until you confirm with ISBE.

Entity: Huntley Comm Sch Dist 158 (2)
School Year: 2019-2020

Search

Table with 7 columns: School Year, District, School, RCDS, Exit Date, Grade, IStar. Contains 18 rows of student data.

Orphanage

I-Star now provides a Possible Youth in Care report that outlines those eligible students for Fund Code E!

Tuition Cost Sheets (Orphanage & Tuition-in)

- Cost sheets impact reimbursement for orphan and excess cost
- Include all appropriate staff (1:1 aides)
- Check cost sheets from other schools if they use this for billing purposes (Tuition-in)
- Check cost sheets from your special education department if your business office is not involved in the process
- **See Handout** in Google Drive

Excess Cost Claim

- Reimbursement for educational costs of high-cost, high-need students whose costs are in excess of 4 X's the district per capita tuition charges
- There is no dedicated budget line-item allocation for Excess Cost Students
- Reimbursed from excess federal room & board funds
- Recent prorations range from 0% to 39.5%
 - Most recent proration: 21.6%
 - FY 2021: 0% reimbursement
 - FY 2022: TBD

Excess Cost Claim Due: July 15th

Reimbursed Quarterly

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Where to Go for Claims Support

Harrisburg Project: hbug.k12.il.us

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IDEA Grant

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Where to Start!

- **Collaborate with Special Education!**
- Set up recurring meetings to discuss these items (Medicaid, Claims, etc.)
- **Medicaid - Contact your third-party provider** and schedule a mtg to review the 3790B report as well as your cost settlement processes. Create a plan to maximize Medicaid.
- **Caseload & Workload** – Work with your HR and Sped teams to understand Sped headcount and implement approval processes tied to workload and caseload.
- **Review/audit your private facility invoices!** Make sure you are not overpaying. (Regular rate versus the intensive rate) - double check all intensive rate invoices to ensure the student has a 1:1 aide.
- **Claims - Work with Sped** to set up a calendar to review and assist with all Sped claims.
- **Contact any of us** if you have questions!

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Opportunity for Questions, & Answers

We thank you for your time!

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