



# Illinois State Board of Education

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**Jesse H. Ruiz**  
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State Superintendent of Education

## MEMORANDUM

APRIL 2009

**TO:** Regional Superintendents  
District Superintendents  
Directors of Special Education

**FROM:** Tim Imler  
Division Administrator  
Funding and Disbursement Services

**SUBJECT:** 2009 Summer School Approval and Reimbursement Processes  
for Services Provided to Eligible Children with Disabilities

### **Summer School Approval Process for Children with Disabilities**

The specific approval processes for special education summer school 2009 are described in the following sections of this memorandum. However, for pupil reporting purposes, please note that all additions of students for the 2008-09 regular school term and the 2009 summer term must be completed by the June transmission of the Funding and Child Tracking System (FACTS), State Reimbursement Approval File. This transmission will be due at the Illinois State Board of Education (ISBE) no later than June 30, 2009.

The instruction booklets and forms referenced in italics within this memorandum can be accessed by clicking on the appropriate underlined hyperlink.

### **Approval Processes and Funding Sources for Summer Term 2009**

#### **Section 14-7.02, Private Tuition**

FACTS is the approval mechanism for students for Section 14-7.02 tuition funding for regular, summer and both terms. Only students listed on FACTS with a fund code of **B** and term codes indicating students enrolled in regular and summer terms **B** or summer term only **S** will be eligible for claiming summer funding under Section 14-7.02.

By entering a term code of **B** or **S**, the school district assures that the summer term program is a continuation of the regular term program or an initiation of the program that will continue into the next school year's regular term. For assistance please refer to [\*Special Education Funding and Child Tracking System \(FACTS\) Instructions\*](#).

The June transmission of FACTS Approval files will be conducted to add any students served in the 2008-09 school year and to add students for 2009 summer school. This electronic data transmission is required by June 30, 2009. Failure to complete and return accurate data on the electronic transmission will result in denial of reimbursement for the summer term.

Claims for tuition reimbursement for the 2008-09 school term and 2009 summer school are to be included on the Special Education Pupil Reimbursement Claim and transmitted electronically to ISBE **on or before August 17, 2009**. Claim corrections, which are also required to be submitted electronically, will be due on or before November 5, 2009. Reimbursement will be made quarterly during FY 2010.

### **Section 14-7.02, Room and Board Reimbursement**

[\*Application for Approval of Private Residential Placement for Room and Board Reimbursement \(ISBE Form 34-37\)\*](#), is used to apply for room and board reimbursement for private residential placements and can be initiated at any time during the regular or summer term by a school district. Approvals are processed by the Special Education Services Division. Additionally, approval on FACTS under Fund Code **B** or **J** is required for summer term room and board claims. Claims for room and board reimbursement are to be submitted through the ISBE Web Application Security (IWAS) system. Claims for the 2008-09 school year and the 2009 summer term should be submitted no later than November 2, 2009.

### **Section 14-7.03 (Individual/Public and Private), Orphanage**

FACTS is the approval process for students for Section 14-7.03 (Fund Codes **D**, **E** or **F**) individual public (services are provided in the public school) and private (the public school is unable to serve the student and places the student in an approved private school program) funding for regular, summer and both terms. By entering a term code of **B** or **S**, the school district assures that the summer term program is a continuation of the regular term program or an initiation of the program that will continue into the next school year's regular term.

The June transmission of FACTS Approval files will be conducted to add any students served in the 2008-09 school year and to add students for 2009 summer school. This electronic data transmission is required by June 30, 2009. Failure to complete and return accurate data on the electronic transmission will result in denial of reimbursement for the summer term.

Additionally, students reported under Section 14-7.03 must clear eligibility checks to qualify for reimbursement. For students not clearing initial checks, [\*Section 14-7.03 Student Eligibility Verification \(ISBE Form 34-75\)\*](#), will be sent to gather information necessary for approval or, if necessary, individual contacts will be made to gather the required information.

The amount of reimbursement under Section 14-7.03 (individual-public) is determined by the actual cost of maintaining public school classes, using the per capita provisions stated in [\*Part 130 Determining Special Education Per Capita Tuition Charge\*](#) authorized under Section 14-7.01 for individual students. The rates under Section 14-7.03 (individual-private) are set by the Illinois Purchased Care Review Board. **A separate electronic claim transmission is required for summer term and is due to ISBE on or before November 2, 2009.** Reimbursement will be vouchered by December 15 per statute.

**Section 18-4.3, Summer School State Aid**

P.A. 93-1022 changed the distribution method for Funding for Children Requiring Special Education Services and impacted students eligible under Section 18-4.3 Summer School State Aid. Students eligible for reimbursement under this section include any special needs student with an Individual Education Plan (IEP) that requires extended school year services (summer school) **with the exception of Individual Orphanage pupils who are claimed under Section 14-7.03.**

A student claimed under Section 18-4.3 must be enrolled in a summer program with a minimum of 60 clock hours of instruction. **The Summer School State Aid claim transmission is due to ISBE on or before November 2, 2009.** All Summer School State Aid claims for the summer of 2009 must be filed electronically using the ISBE Web Application Security (IWAS) system. Reimbursement will be vouchered by December 15 per statute.

**IMPORTANT:**

Please be advised that each district must ensure and maintain documentation of eligibility for each student claimed under Section 18-4.3 for audit purposes.

**Section 14-13.01(b), Transportation**

To obtain approval for special transportation, **Code 25** must be listed as a related service on FACTS for each child that has special transportation indicated as a related service on his/her IEP for the regular and/or summer term.

Article 5/29-5 of the Illinois School Code requires all claims to be transmitted to ISBE on or before August 15 each year. All claims must be filed electronically through the Pupil Transportation Claim Reimbursement System located within the ISBE Web Application Security (IWAS) system.

In FY 2010, you should report expenditures and offsetting revenue for the period of July 1, 2008, through June 30, 2009. Special transportation is reimbursed at 80 percent of total costs and will be distributed quarterly per statute. If the amount appropriated is insufficient to fund total claims for any fiscal year, reimbursement will be prorated.

**Section 14-13.01, Personnel**

Personnel reimbursement is only available during the summer term for those persons working directly with students in an instructional or diagnostic capacity and for those persons necessary to support these instructional and diagnostic personnel. Section 14-13.01 of the School Code states, in part: "When any school district...operates a school or program...in excess of 180 days..." If no students are present, there is no summer term school or program; hence, no reimbursement is available.

All personnel employed during the 2008 summer term to provide special education instructional and related services to students and to provide ongoing screening/diagnostic assessment services to students were required to be reported on the first transmission of Special Education Personnel Employed, 2008-09 School Year, which was available in September 2008. This approval data is required to be transmitted electronically.

Term codes of **R**, **S** and **B** (**R** = regular, **S** = summer, **B** = both terms) may be used when reporting staff. Any personnel employed only during the regular term would have a term code of **R**; those employed only for the summer term would have a term code of **S**. An individual employed in the same work assignment for both the 2008 summer school and the 2008-09 regular term would have a term code of **B**.

However, any individual employed in a work assignment during the 2008 summer school that is different from the work assignment for the 2008-09 regular term must be entered twice, using term code **S** for the summer assignment and term code **R** for the regular-term assignment.

Personnel employed in summer programs must hold the appropriate certificate or approval for the position for which they are employed. Personnel who are not approvable based upon data transmitted through the approval process will not be eligible for reimbursement. Please refer to the [Special Education Personnel Employed Procedures](#).

All entities reporting personnel employed for the summer term should record and retain on file for audit purposes, the summer term beginning and ending dates. If more than one set of dates applies, the earliest beginning date and the latest ending date of employment are to be specified. Personnel reimbursement for the summer term is based on a four-hour day being considered as full-time employment. Dividing the allowable reimbursement for a full-time regular school term employee (\$9,000 for professionals and \$3,500 for non-certified employees) by 180 school days yields an approximate daily reimbursement rate of \$50 for professional staff and \$19 for non-certified staff. A maximum of 55 summer days is claimable.

All personnel employed for 2008 summer school are to be included on the 2008-09 Special Education Personnel Reimbursement claim which is due by statute on August 15. Reimbursement will be made quarterly during FY 10 per statute.

#### **Claims/Reimbursement/Approval Contacts**

If you have questions specific to a single reimbursement or approval process, contact one of the following staff members by phone at **217/782-5256** or by FAX at **217/782-3910**.

|                |   |
|----------------|---|
| Jodi Whitlow   | Special Education Pupil Reimbursement Claims  |
| Sharon Conrath | Special Education Personnel Approvals   |
| Judy Conboy    | Special Education Personnel Reimbursement Claims  |
| Sharon Conrath | Special Education Room and Board Reimbursement  |
| Kathy Joyce    | FACTS (Sections 14-7.02, 14-7.02b, 14-7.03—Individual/Public and Private and 14-13.01—Special Transportation) |
| Jamie Johnson  | Annual Claim for Pupil Transportation Reimbursement   |
| Jodi Whitlow   | Summer School State Aid Claim   |

**Private Residential Placement for Room and Board Approval (ISBE Form 34-37)**

If you have questions specific to this approval process, please contact Boyd Ferguson in the Division of Special Education at **217/782-5589** or by FAX at **217/782-0372**. The [\*Application for Approval of Private Residential Placement for Room and Board Reimbursement \(ISBE Form 34-37\)\*](#) is available in an on-line format. As a result, private placement coordinators are able to complete the application on-line and print it for mailing.

**Electronic Data Transmission Contact**

If you have questions regarding the electronic transmission of personnel or pupil data, please contact Harrisburg Project Client Support at 1-800/635-5274. Questions regarding the electronic submission of summer school state aid or transportation claims should be directed to the person responsible listed above.