Fiscal Year 2027 IDEA Excess Cost Program Information and eGrant Application Instruction Booklet

November 2026

ILLINOIS STATE BOARD OF EDUCATION

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Application Notes

The Individuals with Disabilities Education Act (IDEA) Part B Grant information is available on the ISBE IDEA Part B Grant Program webpage.

This instruction booklet provides instructions for completing the IDEA Excess Cost Application through the eGrant system. Most of the information contained in this booklet is also available in the eGrant Excess Cost Application under links to help or instructions.

The completed Excess Cost Application must be submitted by **Jan. 15, 2027. The application opens Nov. 3, 2026**. Districts that do not submit the 2027 IDEA Excess Cost Application by the due date are subject to having IDEA funds frozen.

Technical assistance on items not covered by the instructions and procedures may be obtained by contacting your grant coordinator:

- Elroy Reed, ereed@isbe.net
- Katanja Cowsen, kcowsen@isbe.net
- Kristy Deckard, kdeckard@isbe.net
- Raúl Lemus, rlemus@isbe.net

You also may contact the Illinois State Board of Education (ISBE) Special Education Department:

Special Education Department (N-253)
Illinois State Board of Education
100 N. First St.
Springfield, Illinois 62777-0001

Telephone: 217-782-5589
Fax: 217-782-0372
TTY: 217-782-1900

Assistance related to the technical aspects of the eGrant process may be obtained by contacting the ISBE Help Desk at 217-558-3600 or HelpDesk@isbe.net.

Section I: Introduction

These directions should be used to complete the IDEA Part B Excess Cost Application. The instructions and procedures cited in this document represent a condensed compilation of major federal and state regulations.

Note that compliance with the Illinois State Board of Education (ISBE) instructions and procedures does not relieve the applicant from responsibility for compliance with all applicable federal and state regulations. These instructions have been completed in accordance with the reauthorization of the IDEA Amendments of 2004 and the 34 Code of Federal Regulations 300 and 301, which were issued in July 2018.

IDEA Excess Cost Applications are completed and reviewed online via a secure connection. Grant applicants can use their ISBE Web Application Security (IWAS) account to access IDEA Excess Cost Applications. Applicants can gain access to IWAS by going to the ISBE website. An IWAS link, where applicants can create a new IWAS account or access an existing account, is located in the System Quick Links dropdown at the top right corner of the ISBE website. The Excess Cost Application can be accessed in IWAS by selecting the system listing that corresponds to the grant application.

Section II: Background and Program Specifications

Excess Cost Background

A Local Education Agency (LEA) may only use funds under Part B of the Act for the excess costs of providing special education and related services for children with disabilities.

The excess cost requirement means that the LEA must maintain its local and state fiscal effort for the education of its children with disabilities before federal funds are used. This ensures that children served with federal funds have at least the same average amount spent on them from sources other than federal funds as do the children in the school district.

The minimum amount that must be spent for the education of children with disabilities is computed under a statutory formula. If an LEA can show that it has (on average) spent the minimum amount for the education of each of its children with disabilities, it has met the excess cost requirement. Part B funds can then be used to pay these additional costs, subject to the other requirements of Part B (priorities, etc.).

The excess cost requirement prevents an LEA from using funds provided under federal programs to pay all the costs directly attributable to the education of a child with a disability.

Each LEA receiving IDEA funds through a flow-through grant must complete the excess cost worksheet annually to demonstrate the district met excess cost in the previous fiscal year as well as identify the new threshold for the current year. Any district in danger of not meeting the excess cost threshold must contact a grant consultant immediately. Failure to meet excess cost will require repayment of federal funds with local funds.

Excess Cost Program Specifications

Districts are allowed to use federal IDEA funds for the excess cost of educating students with disabilities, per 34 CFR 300.202. Each district must calculate and verify its excess cost threshold annually. ISBE provides an IDEA Excess Cost Application in IWAS to assist districts in calculating, documenting, and verifying the excess cost of

educating students with disabilities in accordance with 34 CFR 300.16 and 300.202, and Appendix A to Part 300.

The IDEA Excess Cost Application in IWAS is used to collect district expenditures and student population data to calculate an average annual per pupil expenditure and IDEA excess cost threshold. These instructions and the Excess Cost Application in IWAS will direct districts to the correct data sources by fiscal year.

Data Sources

- The FY 2027 IDEA Excess Cost Application is in IWAS.
- The FY 2026 Annual Financial Reports (AFRs) are available via ISBE's Cerberus FTP Server. Click the link, enter **finread** in the username, and then click **Sign in**. This application **does not** require a password.
- FY 2026 total Student Enrollment numbers are automatically provided in the IWAS application.
- FY 2026 number of students with Individualized Education Programs (IEPs) are automatically provided in the IWAS application.
- FY 2026 numbers of elementary and secondary students with IEPs who are in a regular classroom 80% or more of the day, 40-79% of the day, and 0-39% of the day are automatically provided in the IWAS application.
- Local records
- The FY 2027 Pupil Transportation Claim may be used for Transportation (Fund 40).

Elementary and Secondary Calculations

Preschool: The calculations are based on kindergarten through Grade 12 data.

Exclude the preschool population in calculating excess cost: The application includes prompts to exclude preschool expenditures.

5-year-old kindergartners: IDEA preschool grants are for students ages 3 to 5, including 5-year-old kindergartners with IEPs. When calculating the IDEA excess cost, include any IDEA preschool grant funds that were used to provide special education and related services to 5-year-old students in kindergarten.

Elementary and Secondary: Federal regulations require districts with both elementary and secondary students to separate those expenditures. LEAs may not compute the minimum average amount they must spend on the education of children with disabilities based on a combination of elementary and secondary enrollments.

The application separates all items by elementary (Grades K- 8) and secondary (Grades 9-12). A running total column is also provided to assist K-12 unit districts in tracking and matching the total expenditures and student counts. Elementary and secondary districts complete the appropriate column of the application and leave the column that does not apply to their student population blank.

Proration: In the event that an expense cannot be separated by elementary and secondary, the district can prorate those expenses. **When prorating any costs, the districts must keep record of the procedure/method used to determine the proration.**

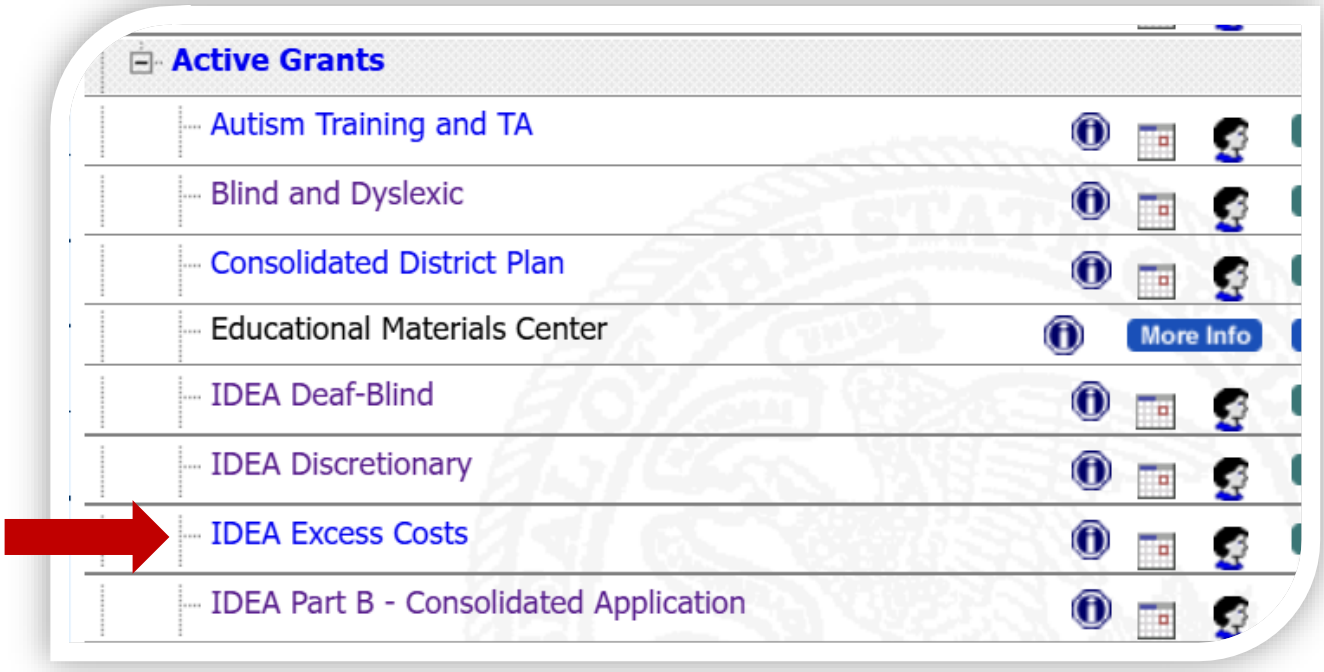
IDEA Excess Cost Calculation

- Determine an average annual per pupil expenditure (APPE).
- The district must spend at least that minimum amount of state/local funds on each student with an IEP.

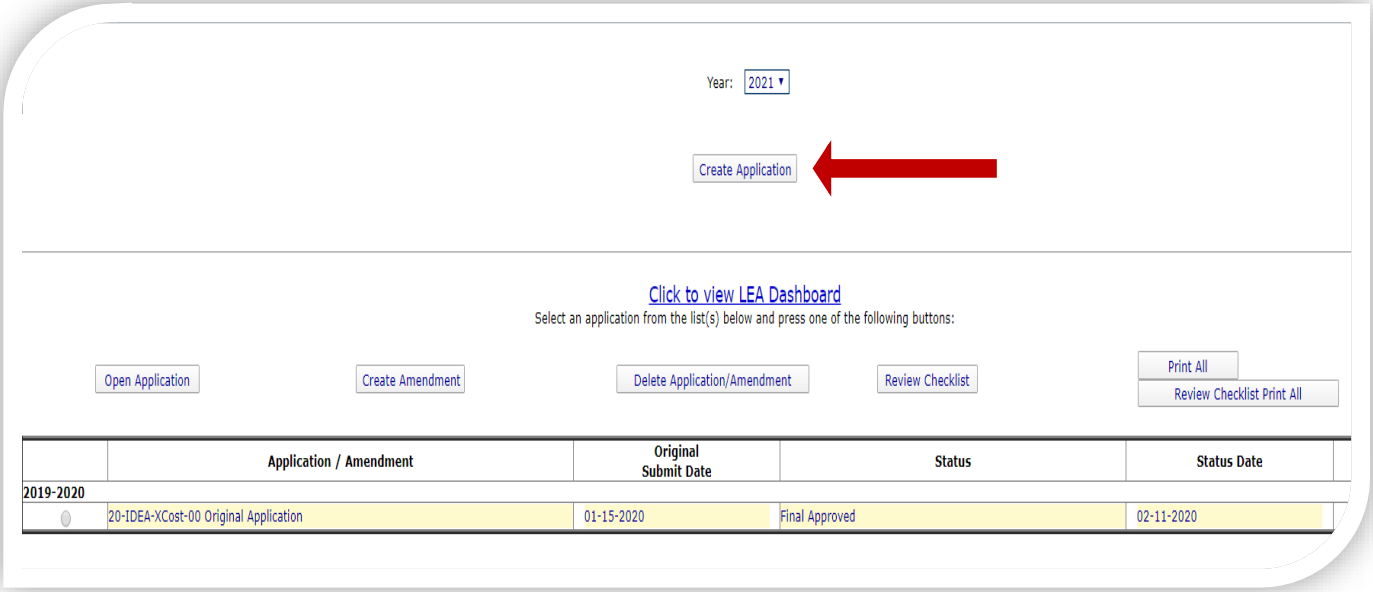
Federal Calculation	Excess Cost Application in IWAS
Calculate the district's total expenditures.	**Section A** – Use the AFR.
Subtract capital outlay, non-capitalized equipment, and debt services expenditures.	**Section B** – Collect capital outlay, non-capitalized equipment, and debt service expenditures. **Section C** – Subtract those expenditures.
Subtract special population expenditures (Title I, Title III, and special education).	**Section D** – Collect Title I, Title III, and special education expenditures. **Section E** – Subtract those expenditures.
Calculate the average APPE.	**Section F** – Calculate the average APPE.
Multiply the APPE by the FY 2026 special education population for the IDEA excess cost threshold.	**Section G** – Calculate the FY 2026 IDEA excess cost threshold.
Verify that the district met the IDEA excess cost threshold established in the prior year.	**Section H** – Compute that the district has met the FY 2026 IDEA excess cost threshold.

Section III: Creating, Completing, and Submitting an eGrant Excess Cost Application

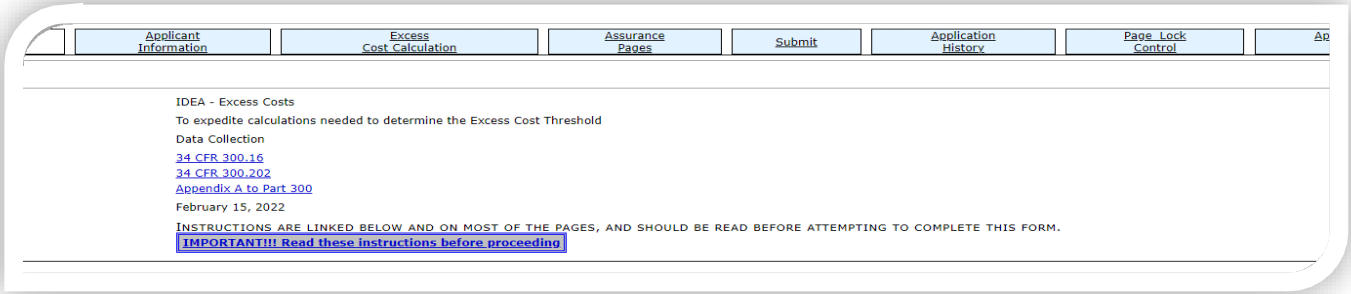
1. Click **IDEA Excess Costs** under Active Grants to create an initial application.



2. Click **Year 2027**, then click **Create Application** to create an initial application.



3. This will open a new application. Select each tab to complete the application.

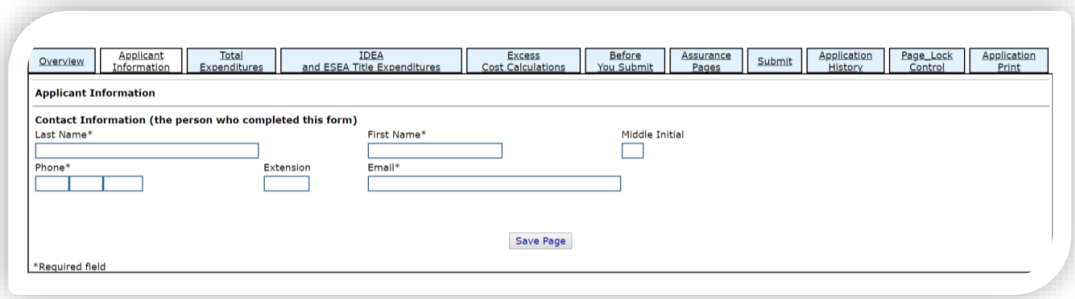


Overview Tab

This tab is for informational purposes only; no data needs to be input on this screen.

Application Information Tab

The contact listed in this section of the application should be the person most directly responsible for completing the application. The person named here is the individual who will be contacted by grant coordinators if changes to the application are necessary.

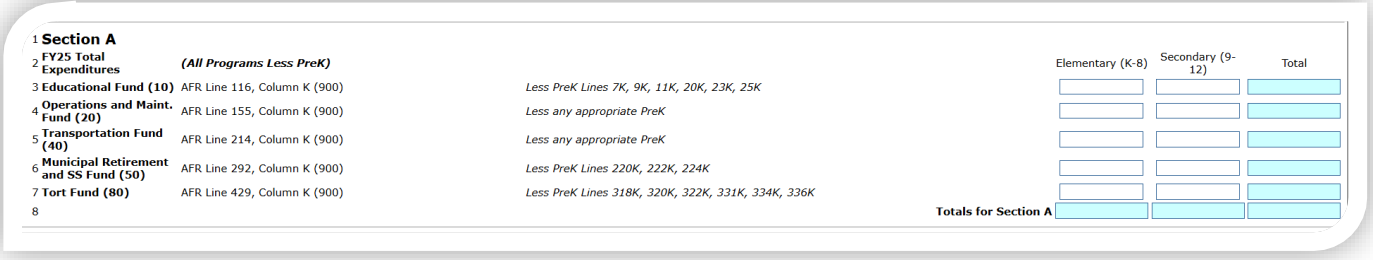


Total Expenditures Tab

Section A – Total Expenditures: Section A collects **all** FY 2026 expenditures, less expenditures for prekindergarten. Enter the data from the district's AFR. The IWAS Excess Cost Application directs the districts to the specific lines and columns of the FY 2026 AFR for the required data.

As detailed below, pre-K expenditures must be subtracted from the applicable lines.

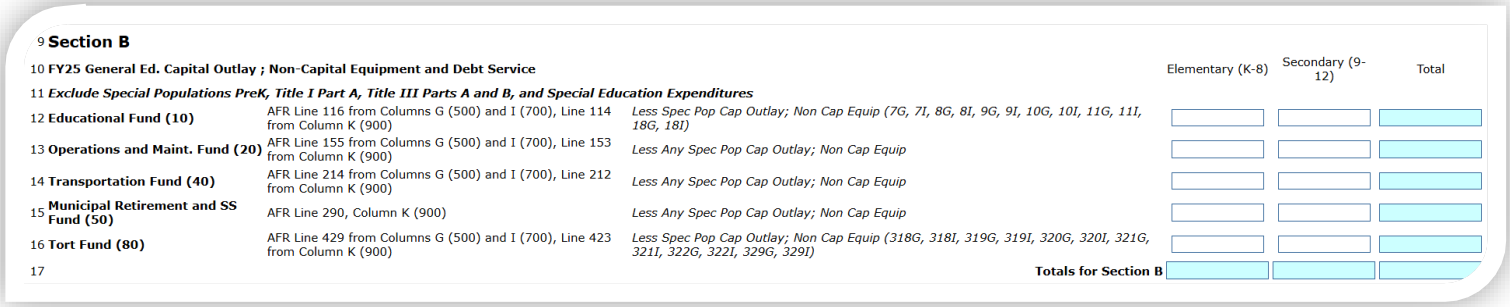
Fund Code	AFR Line Number(s)
Educational Fund (10)	AFR Line 116, Column K (900) - *Less pre-K from Lines 7K, 9K, 11K, 20K, 23K, 25K.*
Operations & Maintenance Fund (20)	AFR Line 155, Column K (900) - *Less any appropriate pre-K.*
Transportation Fund (40)	AFR Line 214, Column K (900) - *Less any appropriate pre-K.*
Municipal Retirements/ SS Fund (50)	AFR Line 292, Column K (900) - *Less pre-K from Lines 220K, 222K, 224K.*
Tort Fund (80)	AFR Line 429, Column K (900) - *Less pre-K from Lines 318K, 320K, 322K, 331K, 334K, 336K.*



Section B – General Education Capital Outlay, Non-Capitalized Equipment, and Debt Service: Section B collects FY 2026 general education expenditures for capital outlay, non-capitalized equipment, and debt service. These are a portion of the expenses that were reported in Section A. Total the line items shown below, then subtract capital outlay/non-capitalized equipment from all special populations (pre-K; Title I, Part A and Title III, Parts A and B; and special education expenditures) to come up with the total capital outlay for **general populations only**. The IWAS Excess Cost Application directs the districts to the specific locations in the AFR for the required data.

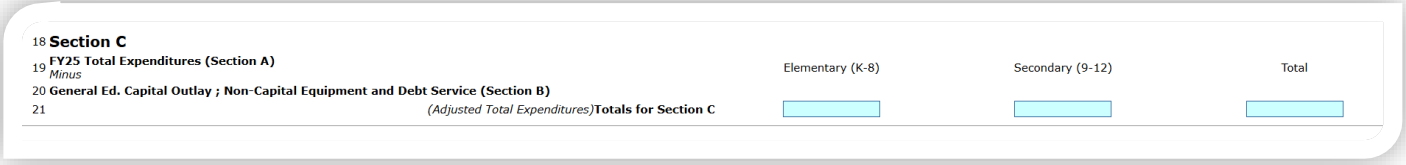
Fund Code	AFR Line Number(s)
Educational Fund (10)	AFR Line 116, Columns G (500) and I (700) + Line 114K (900) - *Less Special Populations Capital Outlay/Non-Capitalized Equipment from Lines 7G, 7I, 8G, 8I, 9G, 9I, 10G, 10I, 11G, 11I, 18G, 18I.*
Operations & Maintenance Fund (20)	AFR Line 155, Columns G (500) & I (700) + Line 153K (900) - *Less Special Population Capital Outlay/Non-Capitalized Equipment.*
Transportation Fund (40)	AFR Line 214, Columns G (500) and I (700) + Line 212K (900) - *Less Special Population Capital Outlay/Non-Capitalized Equipment*
Municipal Retirements/SS Fund (50)	AFR Line 290, Column K (900)
Tort Fund (80)	AFR Line 429, Columns G (500) and I (700) + Line 423, Column K (900). - *Less Special Populations Capital Outlay/Non-Capitalized Equipment from Lines 318G, 318I, 319G, 319I, 320G, 320I, 321G, 321I, 322G, 322I, 329G, 329I.*

Make sure to exclude all capital outlay, non-capitalized equipment from all special populations (pre-K; Title I, Part A; and Title III, Parts A and B expenditures from above).



9	**Section B**				
10	**FY25 General Ed. Capital Outlay ; Non-Capital Equipment and Debt Service**		Elementary (K-8)	Secondary (9-12)	Total
11	***Exclude Special Populations PreK, Title I Part A, Title III Parts A and B, and Special Education Expenditures***				
12	**Educational Fund (10)**	AFR Line 116 from Columns G (500) and I (700), Line 114 from Column K (900)	*Less Spec Pop Cap Outlay; Non Cap Equip (7G, 7I, 8G, 8I, 9G, 9I, 10G, 10I, 11G, 11I, 18G, 18I)*			
13	**Operations and Maint. Fund (20)**	AFR Line 155 from Columns G (500) and I (700), Line 153 from Column K (900)	*Less Any Spec Pop Cap Outlay; Non Cap Equip*			
14	**Transportation Fund (40)**	AFR Line 214 from Columns G (500) and I (700), Line 212 from Column K (900)	*Less Any Spec Pop Cap Outlay; Non Cap Equip*			
15	**Municipal Retirement and SS Fund (50)**	AFR Line 290, Column K (900)	*Less Any Spec Pop Cap Outlay; Non Cap Equip*			
16	**Tort Fund (80)**	AFR Line 429 from Columns G (500) and I (700), Line 423 from Column K (900)	*Less Spec Pop Cap Outlay; Non Cap Equip (318G, 318I, 319G, 319I, 320G, 320I, 321G, 321I, 322G, 322I, 329G, 329I)*			
17			**Totals for Section B**			

Section C – Total Expenditures (Adjusted): Section C subtracts the general education capital outlay, non-capitalized equipment, and debt services expenditures from the total expenditures. The IWAS Excess Cost Application calculates the adjusted total expenditure as data is entered in Sections A and B.



18	**Section C**			
19	**FY25 Total Expenditures (Section A)** *Minus*	Elementary (K-8)	Secondary (9-12)	Total
20	**General Ed. Capital Outlay ; Non-Capital Equipment and Debt Service (Section B)**			
21	*(Adjusted Total Expenditures)***Totals for Section C**			

IDEA and ESEA Title Expenditures Tab

Section D – Elementary and Secondary Education Act (ESEA) Title and Special Education Expenditures:
Section D collects expenditures for special populations — Title I, Part A; Title III, Parts A and B; and special education. These are a portion of the costs that were previously entered into Section A as part of the total expenditures.

- Exclude pre-K expenditures.
- Each district must note the FY 2026 AFR location for the Title I, Part A; Title III, Parts A and B; and special education expenditures. (Refer to the tables below for examples.)
- The AFR can be referenced in several ways. For example, line/column 8K can also be listed as Fund 10/Function 1200/900. Similarly, 22/900 can be listed as Fund 10/Function 1912/900.

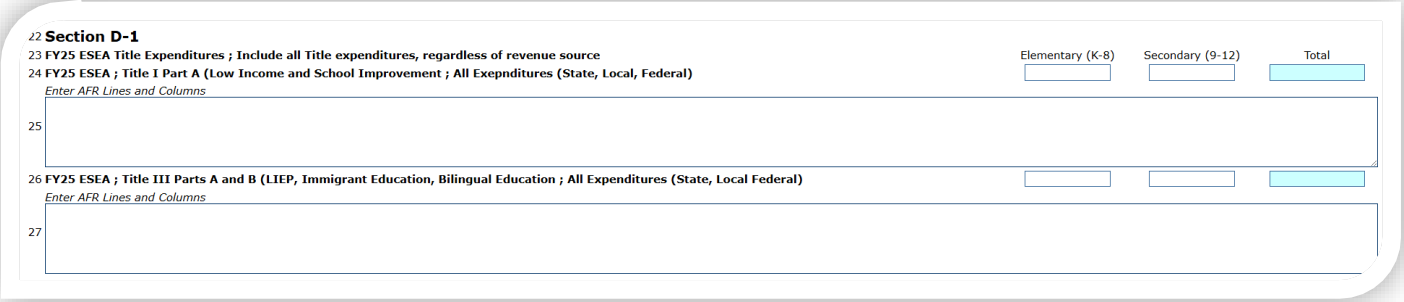
Section D-1 – FY 2026 ESEA Title Expenditures:

Title I Expenditures	AFR Line Number(s)
FY 2026 Title I, Part A ***(Low-income and school improvement expenditures)*** ***All expenditures (state local and federal)***	**AFR Lines: 10K, 24K, 223K, 321K, 335K** ***"Remedial and Supplemental Programs" lines of the AFR.***

- K-12 Title I, Part A expenditures: Title I, Part A grant expenditures **and** any local funds expended for Title I, Part A costs

Title III Expenditures	AFR Line Number(s)
FY 2026 Title III, Parts A and B **(Immigrant education, bilingual education, Transitional Program of Instruction/Transitional Bilingual Education)**	**AFR Lines: 18K, 31K, 231K, 329K, 342K** ***"Bilingual" lines of the AFR.***

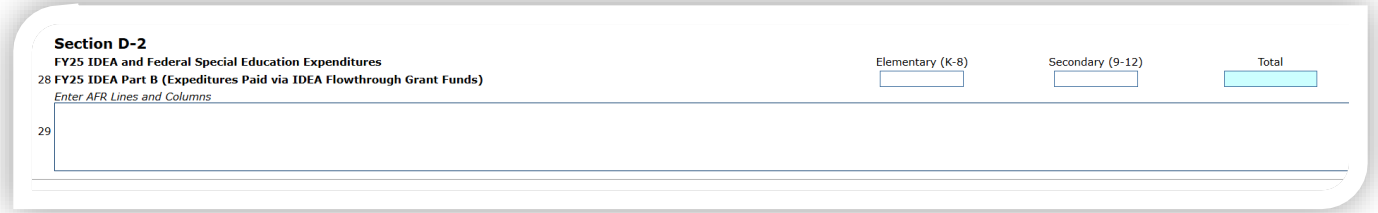
- K-12 Title III, Parts A and B expenditures: Title III, Parts A and B grant



Section D-2 – FY 2026 IDEA Part B: All IDEA federal expenditures, flow-through (including Coordinated Early Intervening Services), and room and board expenditures.

IDEA Expenditures	FRIS or AFR Line Number(s)
IDEA Part B **(Expenditures paid for with IDEA flow-through grant funds)**	**May be found in FY 2026 Financial Reimbursement Information System (FRIS) or AFR Revenue Lines 210 and 211, less any pre-K.**

- K-age 21 special education expenditures paid with IDEA flow-through grants: This line is for federal IDEA expenditures only. Do not include state or local expenditures.



Make sure the IDEA special education costs in this section are **not** duplicated in the state/local special education expenditures in Section D-3.

Section D-3 – All Other FY 2026 Special Education Expenditures: K-12 state and local expenditures only.

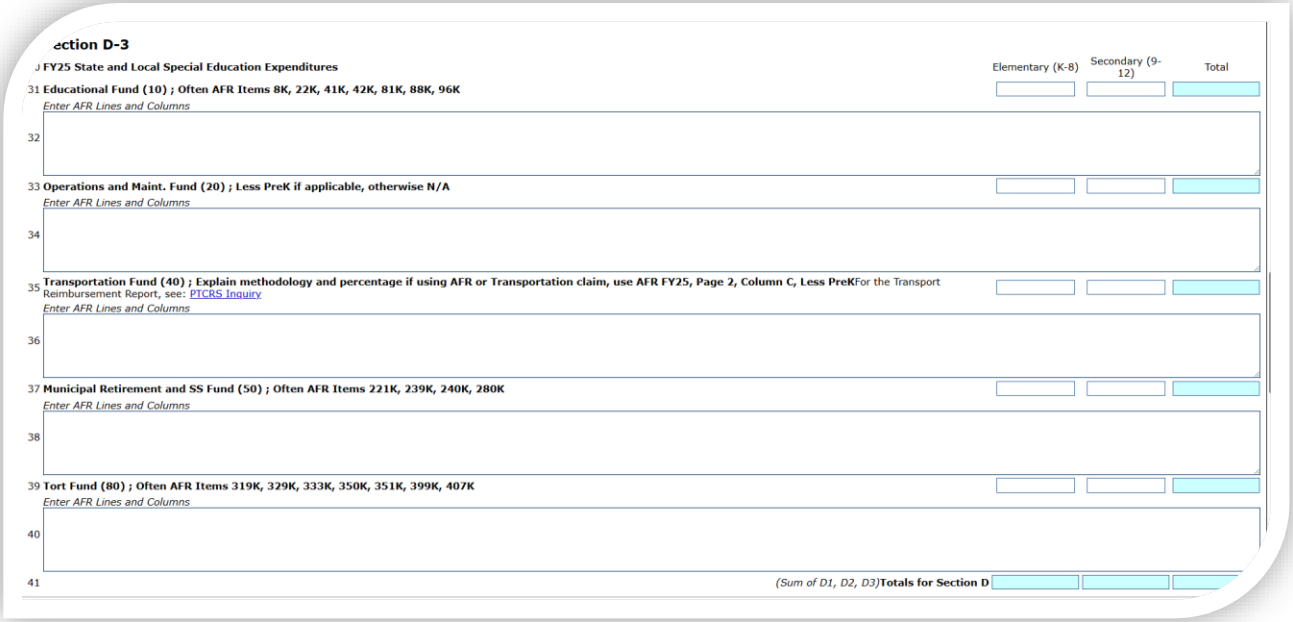
For each of the funds listed below, follow the steps outlined, as applicable.

- Step 1: Total all special education expenditures from the AFR.
- Step 2: Subtract federal IDEA flow-through expenditures reported in Section D-2.

Fund Code	AFR Line Number(s)
Educational Fund (10)	Often AFR Lines: 8K, 22K, 81K, 88K, 96K (Special Education Programs) and 41K, 42K (Support Services).
Operations & Maintenance Fund (20)	Often AFR Line 138K or N/A.
Transportation Fund (40)	Click FY 2026 Transportation Claim, select the State Fiscal Year, enter your District Name, then select Display Report. Next, see Page 2, Line 23, Column C (Spec. Ed.) for the monetary value to use for this fund.
Municipal Retirements/SS Fund (50)	Often AFR Lines: 221K, 280K (Special Education Programs) and 239K, 240K (Support Services).
Tort Fund (80)	Often AFR Lines: 319K, 333K, 350K, 351K, 392K, 399K, 407K.

The AFR does **not** separate the special education expenditures out by IDEA or state/local funding sources. Districts must use their local records, including IDEA expenditure reports, to identify the state/local special education expenditures.

- Provide the AFR lines/columns/amounts or source of data for each line item. Enter NA in the description field if no funds were expended in that area.
- Districts can use their AFR with local records for the Transportation Fund (Fund 40) or the Transportation Claim to obtain the amount spent for special education transportation purposes. If using the Transportation Claim, use the FY 2026 claim (to obtain FY 2026 expenditures) and Page 2, Column C less any pre-K to obtain special education expenditures.



Section E – Adjusted Total Expenditures less Special Education and ESEA Title Expenditures: Section E subtracts the special population expenditures (Section D) from the total expenditures. This section **automatically** calculates the adjusted total expenditure based on the data entered in Sections C and D.

Excess Cost Calculations Tab

Section F – Average Annual per Pupil Expenditure: Section F calculates the annual per pupil expenditure (APPE) based on the FY 2026 expenditures and total student population. The yellow boxes should be prepopulated. The blue boxes populate once all data has been entered and the page is saved.

Section G – Minimum District Must Spend Per Pupil with Disabilities: Section G calculates the IDEA excess cost threshold based on the APPE and the FY 2026 special education population. The number of students with IEPs should be prepopulated. The Excess Cost Application in IWAS calculates the final excess cost threshold using the FY 2026 APPE multiplied by the FY 2026 IDEA child count (FY 2026 APPE * FY 2026 IDEA child count = FY 2026 excess cost threshold). This is the district's IDEA excess cost threshold for FY 2026. The district must spend at least this amount of FY 2026 local or state/local funds to educate students with disabilities.

Section H – Excess Cost Calculation: Section H is a tool to verify that the district met the FY 2026 excess cost threshold by comparing the excess cost threshold identified in Section G to actual FY 2026 expenditures. The threshold will be compared to the total of three levels of special education expenditures explained below to determine if a district has met excess costs in FY 2026.

Descriptions of the three levels of expenditures to be used are as follows.

Level One Expenditures – State and Local Special Education Expenditures: These are already identified and totaled in the ESEA Title and IDEA expenditures. They consist of district's direct expenditures for special education students who are not covered by their IDEA funds. This total will automatically be populated within IWAS.

Level Two Expenditures – Percentage of Non-Direct Education Expenditures for Students with Disabilities: These are expenditures for items that are equally available to all students (e.g., media, school lunch, school administration, attendance, guidance, etc.). Since they are equally available to all students, multiply the expenditures by the percentage of students with disabilities in the district. The percentage of students who are special education will be calculated based on the number of students with IEPs divided by the total enrollment.

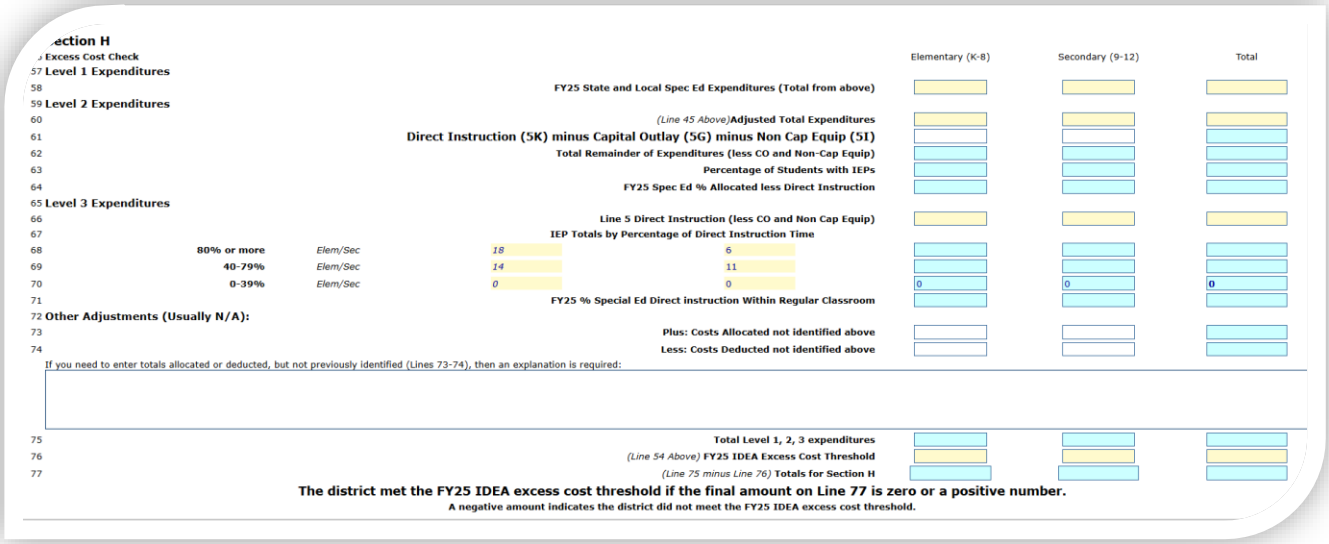
Section Information	AFR Line Number(s)
Section H – Line 61 **Less Line 5 Direct Instruction (less capital outlay and non-capitalized equipment)**	**AFR Line 5, Column K less capital outlay (5G) and non-capitalized equipment (5I)**

- Total adjusted expenditures, less direct instruction (AFR Line 5, Column K) will be multiplied by the percentage of students with disabilities in the district.

Level Three Expenditures – Percentage of General Education Expenditures for Students with Disabilities: These are expenditures for students with disabilities participating in general education. To determine the amount of direct instruction that can be included (Line 5 less capital outlay and non-capitalized equipment), look at the percentage of time the students with disabilities spend in general education classrooms.

- ISBE has preloaded the number of elementary and secondary students with IEPs who are in a regular classroom 80% or more of the day, 40-79% of the day, and 0-39% of the day.
- IWAS will calculate the amount of direct instruction that can be included from the number of students with IEPs who are in general education classrooms for each of the three categories.

Other adjustments (usually non-applicable): There are additional options to add or subtract expenditures from the above calculation. Most districts should meet excess costs using the three levels previously detailed. If a district needs to use the other adjustments, please include an explanation indicating the reason for additional expenditures to be added or subtracted. Lines 73 and 74 must have a number.



ection H
Excess Cost Check

					Elementary (K-8)	Secondary (9-12)	Total
57	**Level 1 Expenditures**						
58				**FY25 State and Local Spec Ed Expenditures (Total from above)**			
59	**Level 2 Expenditures**						
60				*(Line 45 Above)* **Adjusted Total Expenditures**			
61				**Direct Instruction (5K) minus Capital Outlay (5G) minus Non Cap Equip (5I)**			
62				**Total Remainder of Expenditures (less CO and Non-Cap Equip)**			
63				**Percentage of Students with IEPs**			
64				**FY25 Spec Ed % Allocated less Direct Instruction**			
65	**Level 3 Expenditures**						
66				**Line 5 Direct Instruction (less CO and Non Cap Equip)**			
67				**IEP Totals by Percentage of Direct Instruction Time**			
68	**80% or more**	*Elem/Sec*	*18*	6			
69	**40-79%**	*Elem/Sec*	*14*	11			
70	**0-39%**	*Elem/Sec*	*0*	0	0	0	0
71				**FY25 % Special Ed Direct instruction Within Regular Classroom**			
72	**Other Adjustments (Usually N/A):**						
73				**Plus: Costs Allocated not identified above**			
74				**Less: Costs Deducted not identified above**			

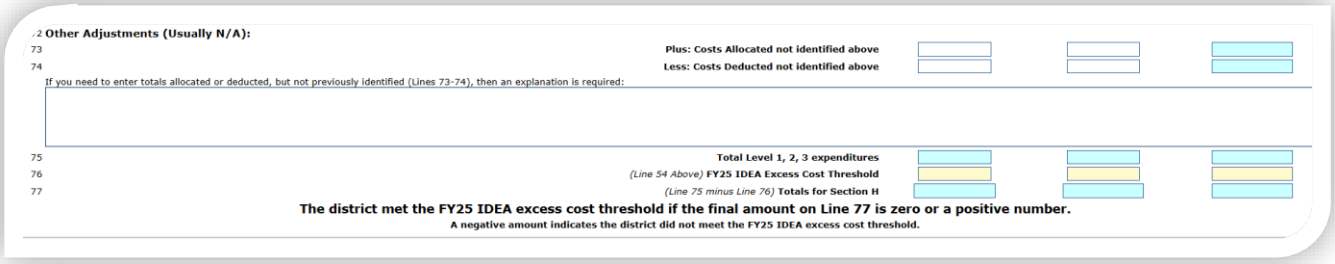
If you need to enter totals allocated or deducted, but not previously identified (Lines 73-74), then an explanation is required:

75	**Total Level 1, 2, 3 expenditures**		
76	*(Line 54 Above)* **FY25 IDEA Excess Cost Threshold**		
77	*(Line 75 minus Line 76)* **Totals for Section H**		

The district met the FY25 IDEA excess cost threshold if the final amount on Line 77 is zero or a positive number.
A negative amount indicates the district did not meet the FY25 IDEA excess cost threshold.

FY 2027 Excess Cost Check: The total from all three levels of special education expenditures will be added together and compared to the excess cost threshold. A positive amount or a zero means the district met the IDEA excess cost threshold. A negative amount means the district did not meet the IDEA excess cost threshold and may be subject to repayment of the federal funds.

- ***Any district with a negative amount must contact its IDEA grant coordinator.***



Other Adjustments (Usually N/A):

73		**Plus: Costs Allocated not identified above**		
74		**Less: Costs Deducted not identified above**		

If you need to enter totals allocated or deducted, but not previously identified (Lines 73-74), then an explanation is required:

75	**Total Level 1, 2, 3 expenditures**		
76	*(Line 54 Above)* **FY25 IDEA Excess Cost Threshold**		
77	*(Line 75 minus Line 76)* **Totals for Section H**		

The district met the FY25 IDEA excess cost threshold if the final amount on Line 77 is zero or a positive number.
A negative amount indicates the district did not meet the FY25 IDEA excess cost threshold.

- The district will meet the FY 2027 IDEA excess cost threshold if the final amount on Line 77 is **zero or a positive number.**

Before You Submit Tab

The calculations of the excess cost system are dependent on accurate totals from previous sections. Therefore, it is imperative that each page is saved again after all final figures have been entered. The sections that need to be saved are:

- Total Expenditures
- IDEA and ESEA Title Expenditures
- Excess Cost Calculations

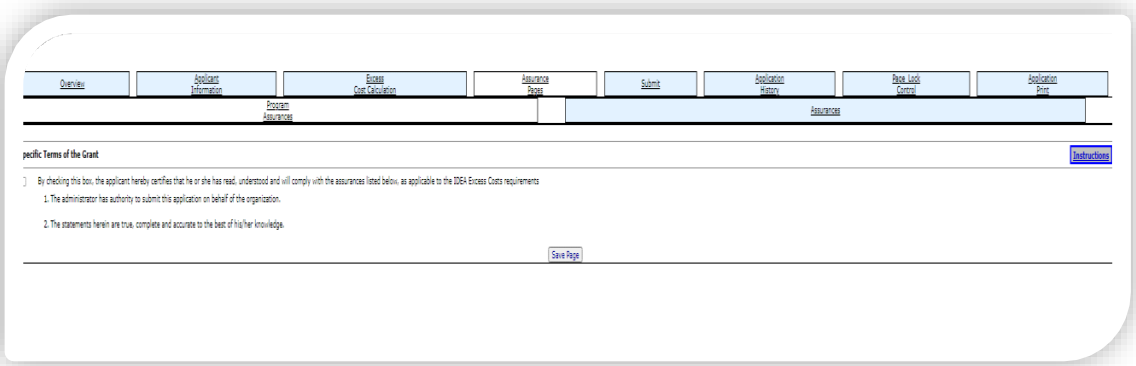
Once all sections have been saved, check the confirmation box and click the **Save Page** button.

Assurances Page Tab

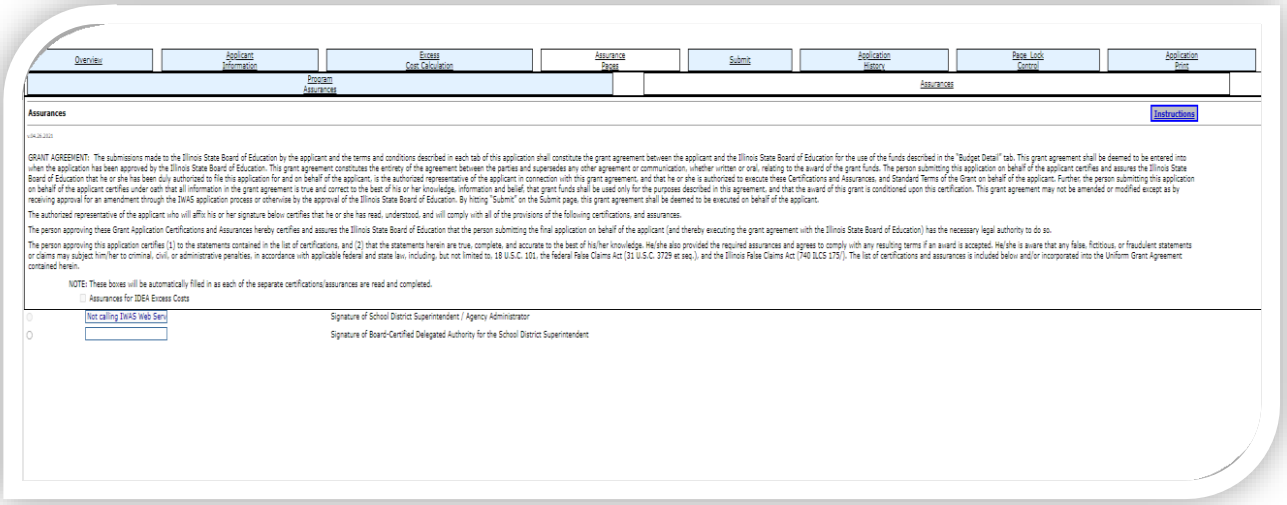
Only the district superintendent or a person with board-certified delegated authority for the superintendent can complete the assurances. The assurances must be completed prior to submitting the application.

Two pages are included in the Assurances tab strip:

- Program Assurances



- Assurances

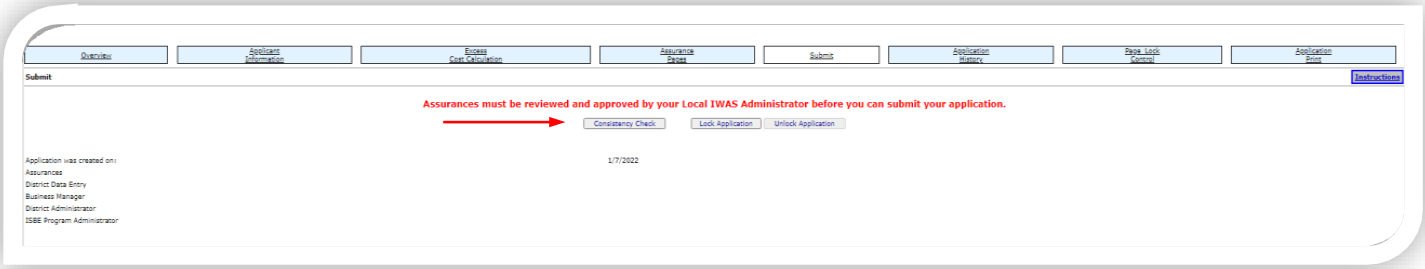


After you have read and agreed to the assurances on the Program Assurances tab, complete the last tab (Assurances) by clicking on the checkbox for each assurance. The district superintendent should click the first button at the bottom of the Assurances tab to automatically insert his/her name for agreement. A person with board-certified delegated authority (someone other than the superintendent) should click on the second button and type his/her name in the textbox next to the second button to agree to all assurances. Click the **Save Page** button when complete.

Submit Tab

Consistency Check Button: Once you have completed your entire application, you must run a consistency check. ***Caution: This check may take a few minutes to run.*** Your application cannot be submitted until this has been successfully run. You must click the **Consistency Check** button to start the process. Once the check has been completed, a message will be displayed indicating that it was either completed successfully (no errors) or if errors were encountered. After you have corrected any errors, you must run the check again until no errors are detected. If no errors are found, the appropriate button will be displayed so that you can submit the application to the next level. You may need to scroll down the page to see the button(s).

Lock Application Button/Unlock Application Button: Anyone in the district with data entry authority can freeze the entire application so that no changes can be made prior to submitting an application. Click the **Lock Application** button to lock the application. This might be appropriate if, for example, there are concerns about multiple people updating an application. ***Only the person who locked the application or a person with district administrative access (e.g., district superintendent) can unlock it by clicking the Unlock Application button.***



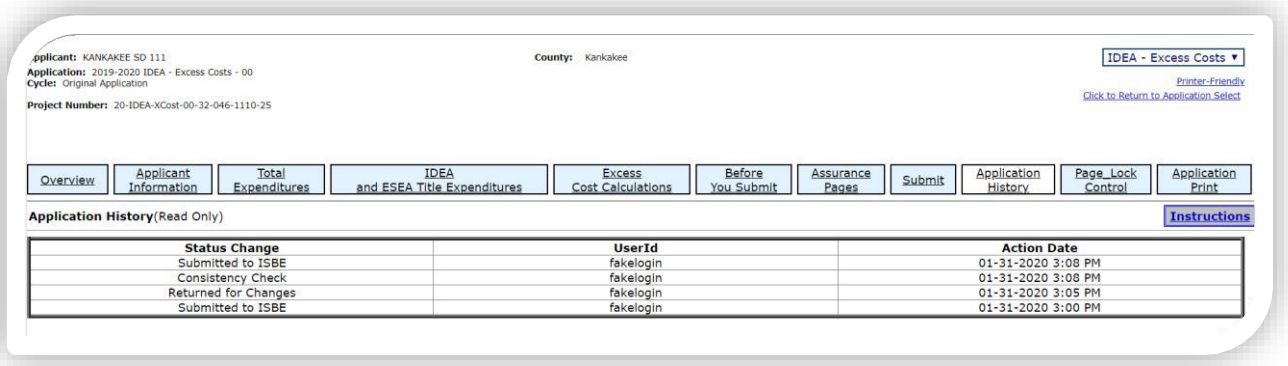
Approval Groups: The following list of approval groups appears at the bottom of the administrative agent's Submit page as appropriate:

- **Assurances were agreed to on (mm/dd/yyyy).** This will be displayed after the district superintendent/cooperative director or board-authorized representative has agreed to all assurances and saved them.
- **Consistency check was run on (mm/dd/yyyy).** This will be displayed after the consistency check has been run successfully. A message will note what must be corrected if the consistency check encounters errors. After you have corrected the errors, run the check again until no errors are detected. If the consistency check does not encounter any errors, the application will remain locked until the district entry person submits it to the business manager or district superintendent. (Refer to Lock Application Button/Unlock Application Button section above).
- **District administrator submitted the application on (mm/dd/yyyy).** The district superintendent or board-authorized personnel are the only people who can submit the application to ISBE. Click either the **Submit to ISBE** or the **Disapprove** button. The application will be locked, and no changes can be made after the application has been submitted to ISBE. If the application is disapproved, it will be returned to the data entry person for changes. It can be resubmitted after changes have been completed.

- **ISBE program administrator approved the application on (mm/dd/yyyy).** An ISBE program administrator will approve or disapprove the application after it has been submitted. An approved application will then be forwarded to the ISBE fiscal administrator. If the application is disapproved, it will be returned to the data entry person for changes. It can be resubmitted after changes have been completed.
- **ISBE program administrator approved the application on (mm/dd/yyyy).** An ISBE program administrator will approve or disapprove the application after it has been submitted. An approved application will then be forwarded to the ISBE fiscal administrator. If the application is disapproved, it will be returned to the data entry person for changes. It can be resubmitted after changes have been completed.

Application History Tab

The Application History page is a read-only page that lists all steps that occur in the submission and approval of an application or amendment. It will display a statement that the application has not been submitted during the initial stage of entering the application information.



The Status Change column lists the status of the application from most recent to oldest. Some typical status entries are:

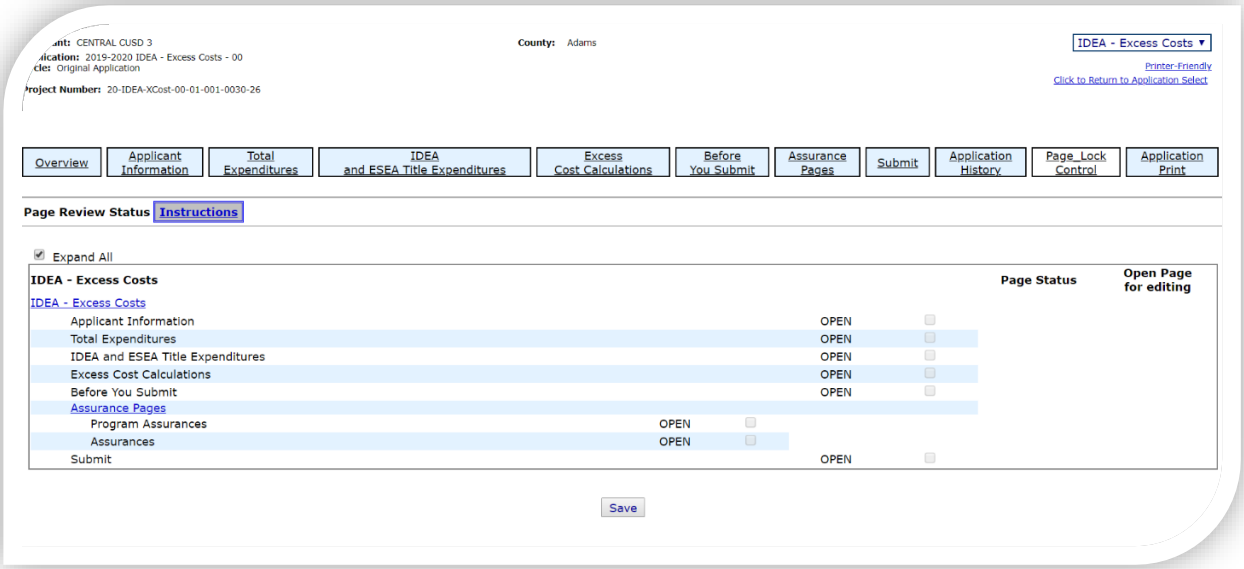
- Submitted to ISBE
- Returned for Changes
- Final Approval

The UserId column displays the identification of the person who was responsible for the change in status, (e.g., the ISBE reviewer who approved the application).

The Action Date column displays the date of the change in status. This page is useful in tracking the application throughout the submission and approval process. Districts may use this page at any point in time to determine the approval status of their application.

Page Lock Control Tab

The goal of the page locking process is to expedite the review of applications by identifying which pages have been changed by a grant applicant. Reviewers will only need to review those pages that have been unlocked since the previous review.



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What Happens When a Page is Locked?

When a page is locked during the application review process, the Save button is no longer available to the applicant, and a message indicates the page has been locked by the agency reviewer. The applicant must go to the Page Lock Control tab, unlock any pages needing revision, and then save the Page Lock Control page. This will cause Save buttons to appear on all of the pages the applicant has unlocked.

When Will Applicants Need to Unlock Pages?

Some or all of the pages may be locked if the application is ***returned for changes*** by an ISBE reviewer. The applicant should read the comments on the review checklist and unlock only those pages that must be changed.

Page will be locked on all applications that have been returned for changes, so applicants should make it a habit to make sure a Save button is available before completing or revising a page. Unlocking pages that will not be modified circumvents the purpose of page locking and slows the review process.

Expand All and List of Application Pages

Click the **Expand-All** checkbox to see the list of application pages that are locked or unlocked. Any application page with data that users enter or revise will appear in the list. Some application pages will not appear on the list. The Overview page and the Budget Summary page are read-only pages and will not appear on the list. Other pages, such as the Submit page and the Page Lock Control page, will never be locked because users need access to functions on these pages throughout the application process. These pages will not appear in the list.

The list of application pages will have two or more indented levels. The first item on the list is the name of the grant program. The first indent under the grant program is the list of pages that appear on the main tab strip. The second indent contains pages that appear in a sub-tab strip. For example, Assurance Pages is on the main tab strip and is in the group indented at the first level. The various assurances (Program Assurances, State Assurances, etc.) are indented under Assurance Pages.

Page Status Column

For ***applicants***, this column displays the current status of the various pages in the application. For ***ISBE reviewers***, this column reflects the status of the page when the applicant submitted it.

Terms included in this column are:

- **Open:** Page is unlocked and can be modified and saved by the applicant.
- **Locked:** The page is locked and cannot be modified by the applicant until it is unlocked. There will not be a Save button on the page, and a message will appear indicating the page has been locked by the agency review
- **Final:** The page has been locked and should not be unlocked by the applicant. Only ISBE staff can unlock a page designated "Final."
- **Unlock Section:** Opens a section for modification. A section can be an entire program or all of the sub-tabs under a main tab. Unlocking pages that will not be changed circumvents the purpose of page locking and slows the review process.

Open Page for Editing Column (applicant column only)

The applicant should check the appropriate box in this column to unlock a page that requires modification. The Page Lock Control page must be saved after checkboxes have been selected.

Review Status of Page Columns (ISBE columns only)

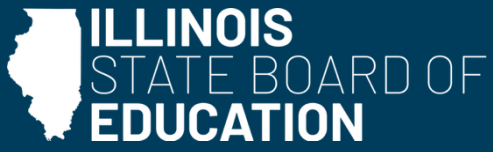
ISBE reviewers will use these columns to unlock pages that require modification or to mark pages as final and locked. After selecting the appropriate radio buttons, the reviewer must save the page.

Unlocking a Page Marked Final

When an applicant determines that a page marked "Final" must be modified, the applicant must contact the ISBE Help Desk and explain why the page requires modification. Only ISBE staff can unlock a locked, final page. The applicant then places the application in Consulting status using the appropriate button on the Submit page. ISBE staff unlocks the page and saves it.

Review Checklist

The review checklist is used by the ISBE principal consultant to communicate changes needed in the grant submission. When an application is returned for changes, the grantee should review the checklist thoroughly and contact the consultant if questions arise. To view the information in the comment boxes, the grantee must either scroll through the comments in the box or click the Printer Friendly link to fully open all of the comment boxes for viewing or printing.



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