# Special Education Room and Board Reimbursement Claim User Guide

#### **OVERVIEW**

The Special Education Room and Board Reimbursement Claim system accessed through the Illinois State Board of Education's (ISBE) Web Application Security system (IWAS) replaces the paper form ISBE 50-97. This web-based data collection system gives school district users these capabilities: electronic access to the Special Education Room and Board Reimbursement Claims and timely submission of claims to ISBE.

This user guide provides instructions for entering claims and adjustments and then submitting them to ISBE, as well as for viewing submitted data. Since fiscal year 2006, Special Education Room and Board Reimbursement claims *must be* completed electronically. This user guide is available online at: <a href="ftp://help.isbe.net/webapps/SpecEdRoomNBoard/SpecEdRBUserGuide.pdf">ftp://help.isbe.net/webapps/SpecEdRoomNBoard/SpecEdRBUserGuide.pdf</a> as well as within the Special Education Room and Board Reimbursement Claim system on the top menu.

#### TIMELINES AND USERS

The project year begins September 1<sup>st</sup> and ends August 31<sup>st</sup>. Claims and/or adjustments may be submitted through November 1<sup>st</sup> after the project ends. Staff at the district office (Document Author) or the Special Education Cooperative (Co-op Doc Author) may enter the claim data, but all claims and adjustments to claims must be reviewed and approved by the District Superintendent using this system.

#### **GENERAL FUNCTIONALITY**

The Special Education Room and Board Reimbursement Claim web data collection system has five menu options available to the Document Author or Co-op personnel and six menu options available to the District Administrator. And at the top of each of these web pages a selection criteria section will allow the user to display requested data in the grid based on the user's needs. The user may select all records for one month, one student, one facility, one status, or select ALL records on file with no filtering. Upon logging into the system, Document Authors and Co-op personnel will see records for September, the first month of the FY, displayed in the grid. District Administrators will see records ready for approval displayed in the *Approve Claims/Adjustments screen*.

#### Document Author or Co-op Doc Author (or Co-op Director) Menu Options:

Menu option	<u>Purpose</u>
Enter claims	Entry of initial claims on approved pupils for the district on file at ISBE ready for claiming through the current date. The student data displayed is from the Application for Approval of Private Residential Placement Room and Board Reimbursement (ISBE Form 34-37) file.
Enter Adj to Paid Claims	Entry of adjustments on <b>PAID</b> claims only.
View Only	Read-only webpage displaying claims and adjustments previously entered and their status.

Detail Error Report Report Report of student records that were **NOT** submitted

because of errors against the ISBE Facts or 34-37 files or

because of claim entry errors.

User Guide Link to this help document.

**District Administrator Menu Options:** 

Menu option Purpose

Approve Claims/Adj Approval of claims or adjustments entered by the

document authors.

Enter claims Entry of initial claims on approved pupils for the district on

file at ISBE ready for claiming through the current date or update of claims previously started. The student data displayed is from the Application for Approval of Private Residential Placement Room and Board Reimbursement

(ISBE Form 34-37) file.

Enter Adj to Paid Claims Entry or update of adjustments to paid claims.

View Only Read-only webpage displaying claims and

adjustments previously entered and their status.

Detail Error Report Report of student records that were NOT submitted

because of errors against the ISBE Facts or 34-37 files or

because of claim entry errors.

User Guide Link to this help document.

#### Adding or Discontinuing Pupil Records for Claiming

If an approved private residentially placed pupil does not appear in the displayed entries or a student will no longer be claimed, please contact the Funding and Disbursements Division at the State Board of Education (217/782-5256) for assistance in updating the Application for Approval of Private Residential Placement Room and Board Reimbursement and/or FACTS files.

## Part 1. Getting Started

Before using the Special Education Room and Board Claim System, you will need an IWAS account.

If you do not have an existing IWAS account, please register for one by accessing the IWAS homepage through the IWAS link at this address: <a href="www.isbe.net">www.isbe.net</a>. Once you have an account, you will need to request access to the Special Education Room and Board Claim System. Instructions for registering for an IWAS account and obtaining authorization for the Special Education Room and Board Claim System are included in the IWAS User Guide which is located on the IWAS homepage. Please contact the ISBE Help Desk at 217/558-3600 if you need assistance.

If you have an existing IWAS account, with access to the Special Education Room and Board Claim System, you are ready to proceed. The following steps provide guidance on how to access the

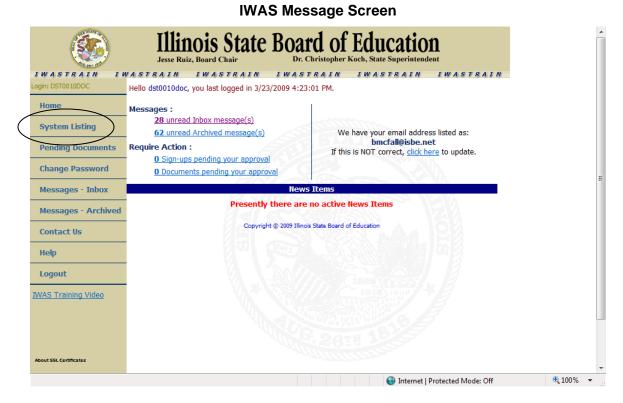
Special Education Room and Board Claim System:

1. Login to IWAS (You need a "login" name and password.)

## Already have an account? Login He New Partner - Sign up Now **ISBE Home** Login Name Some ISBE web-based systems require electronic signatures. You can create your own logon id and password by clicking on the following link. After you establish your logon, you will then have the ability to request authorization to use ISBE's systems. Home Sign Up Now Remember Login Na **Get Password** LOGIN Sign Up Now Contact Us Get Password? Need Help? Help If you have forgotten your login name or pa If you need help with logging in, the sign up procedure or you password, please click on the link below. IWAS User Guide IWAS Training Video Find Login/Password N Copyright © 2009 Illinois State Board of Education Internet | Protected Mode: Off

## **IWAS Homepage Screen**

2. Click on **System Listing** from the left menu of the IWAS Message screen shown below:



When you click on "System Listing" the "My Systems Screen" will appear as shown on page 5.

3. In the "My Systems" screen, click on Spec Ed Room and Board Claim which is under the category of Claims. Clicking on the "Spec Ed Room and Board Claim" will bring you to the Special Education Room and Board Claim main menu.

#### Note:

If you do not see the Special Education Room and Board Claim option, contact the ISBE Help Desk at 217/558-3600.

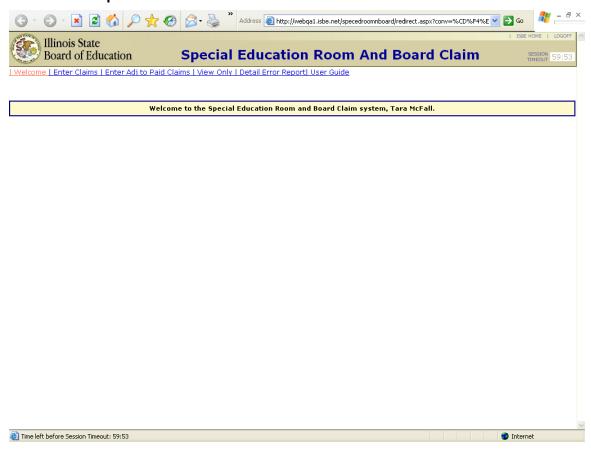


# Part 2. Special Education Room and Board Claim

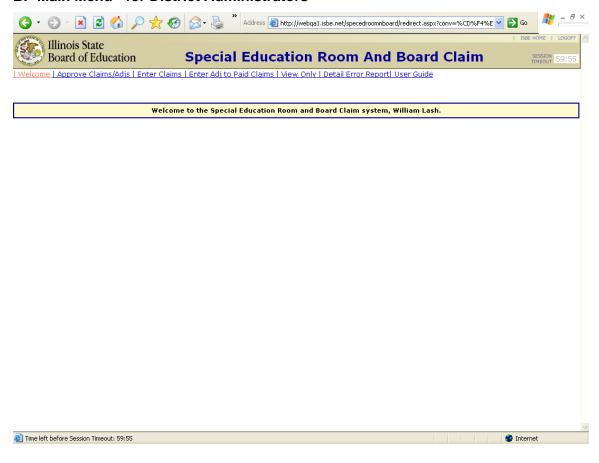
# A. Main Menu - for Document Author or Co-op Personnel

The Special Education Room and Board Claim main menu screen is shown below. If you need help in navigating through the system or need access to the instructions on entering or submitting claims/adjustments, you may click on "User Guide" found on the top menu.

## Special Education Room and Board Claim Main Menu Screen

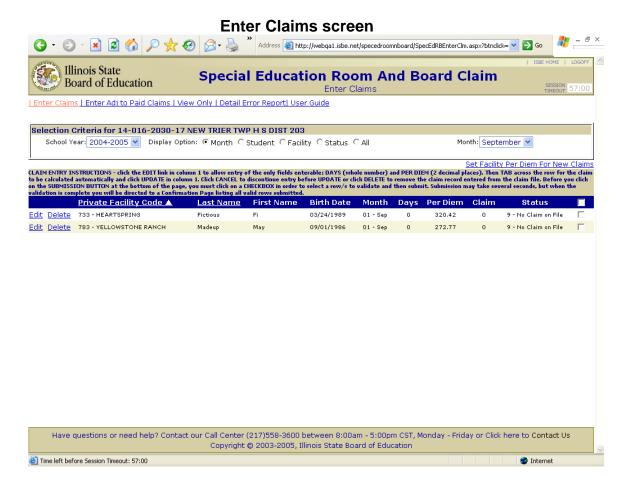


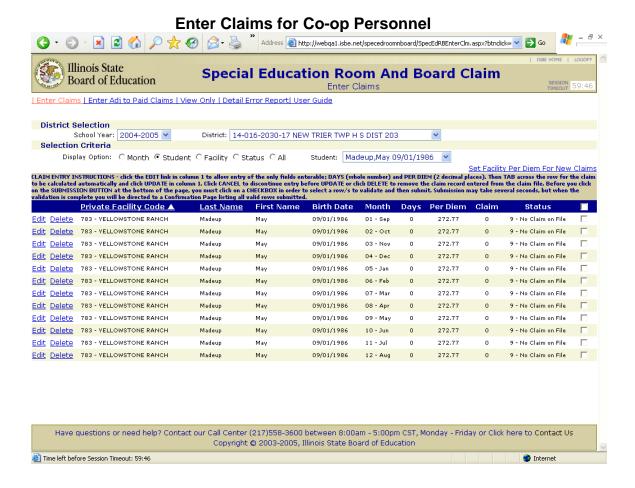
## B. Main Menu - for District Administrators



#### C. Enter Claims

Click on the menu option Enter Claims in order to begin entering claims.





#### ENTER CLAIMS—STEPS FOR ALL USERS

- 1. At the top of the webpage is a Selection Criteria section which will allow display of requested data in the grid based on specific needs. Upon first entering the system, the default data displayed in the grid will be for September, the first month of the FY. You may want to select another month, but you will only be able to enter prior months through the current calendar date. Co-op users will need to select the district to enter data for. Users have the option to display approved student records only for one month, for one student, for one facility, for one status type or to display all approved student records for the district.
- Grid column headings that are underlined indicate a sort able field and will toggle between ascending and descending order. The Enter Claims grid can be sorted by facility or student last name.

Click the Edit link in column one of the grid to select a student at a particular facility for a particular month to enter. The Edit link will change to Update and you may begin entering in the grid row. The grid will be filled with all of the student information on file based on the display option selected in the Selection Criteria box. **The only fields enterable are number of days and per diem.** 

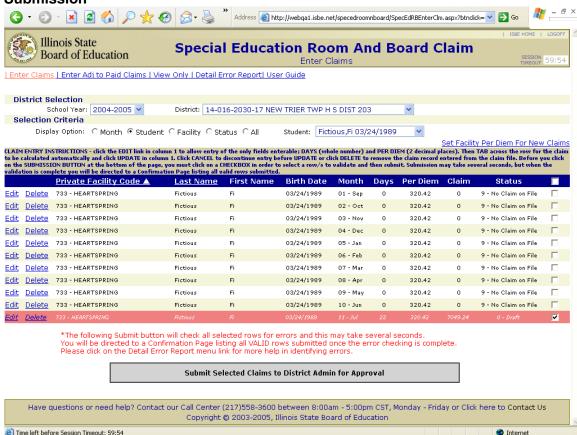
Enter the total number of days (whole number) for which room and board was paid in the month selected. You may only enter the number of days through the current date. EG. If today is Oct 6, you many only enter 6 days for any student to be claimed for October. Below are the maximum days allowed per month:

Month Code	
September 01	Maximum 30
October 02	Maximum 31
November 03	Maximum 30
December 04	Maximum 31
January 05	Maximum 31
February 06	Maximum 28/29
March 07	Maximum 31
April 08	Maximum 30
May 09	Maximum 31
June 10	Maximum 30
July 11	Maximum 31
August 12	Maximum 31

- 3. Enter the net per Diem amount paid for room and board (to 2 decimal places), if other than listed. The per diem pre-filled in the grid is the per diem rate set by the Illinois Purchased Care Review Board and may not be exceeded. You may click the Set Default Per Diem button to change the per diem rate for all NEW student claims in a facility.
- 4. The claim amount will be calculated automatically and is NOT enterable.
- 5. Click the Update link in column one to save the data you just entered as a draft. Or
  - a. If you do not wish to continue on a row and have your entry saved, click Cancel.
  - b. Click delete on any claim record to remove it from the claim file. The delete link will NOT delete a student from the FACTS file, only the claim record entered for that month.

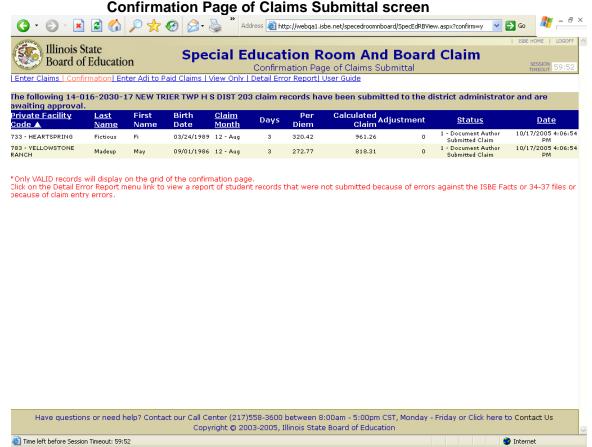
6. Once you are done entering all applicable claim rows in the grid, click on the checkbox at the end of each row to submit to the District Superintendent (if Document Author or Co-op Doc Author) or to ISBE (if District Administrator). You may select all rows in the grid on the page showing by clicking on the checkbox at the top of the column next to the Status column.





#### D. Confirmation Screen

A confirmation screen will be displayed after you click the submission button on the Enter Claims screen. The Confirmation screen is a display of all **VALID** records just submitted. Only valid records will display on the grid of this confirmation page. Click on the Detail Error Report menu link to view a report of student records that were not submitted because of errors against the ISBE Facts or 34-37 files or because of claim entry errors. If the user is a Document Author (at the district or any co-op personnel), an IWAS pending document counter is incremented for each VALID student claim record submitted for this system notifying the district superintendent of the need to approve the claims.



When the district superintendent approves the claims, an IWAS email message will be sent to all claim submitters for the district stating the claims have been approved and are pending payment.



#### ENTER ADJUSTMENTS TO PAID CLAIMS - STEPS FOR ALL USERS

- 1. At the top of the webpage is a Selection Criteria section which will allow display of requested data in the grid based on specific needs. Upon first entering the system, the default data displayed in the grid will be for paid claims and previously entered adjustments for the first month of the FY. You may want to select another month, but you will only be able to enter prior months through the current date. Co-op users will need to select the district to enter data for. Users have the option to display records only for one month, for one student, for one facility, for one status type or to display all adjustable records for the district.
- 2. **Grid column headings that are underlined indicate a sort able field** and will toggle between ascending and descending order. The Enter Adjustments to Paid Claims grid can be sorted by facility or student last name.
- 3. Click the Edit link in column one of the grid to select a record at a particular facility for a particular month to adjust. The Edit link will change to Update and you may begin entering in the grid row. The grid will be filled with all of the claim information on file based on the display option selected in the Selection Criteria box. The only fields enterable are number of days and per diem.

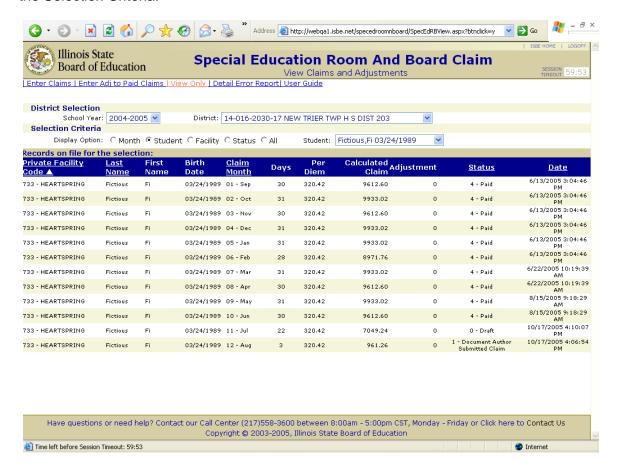
4. Enter the total number of days (whole number) for which room and board was paid in the month selected. You may only enter the number of days through the current date. EG. If today is Oct 6, you many only enter 6 days for any student to be claimed for October. Below are the maximum days allowed per month:

Month Code September 01 October 02 November 03 December 04 January 05 February 06 March 07 April 08 May 09 June 10 July 11	Maximum 30 Maximum 31 Maximum 30 Maximum 31 Maximum 31 Maximum 28/29 Maximum 31 Maximum 30 Maximum 30 Maximum 30 Maximum 30 Maximum 30 Maximum 31
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August 12	Maximum 31

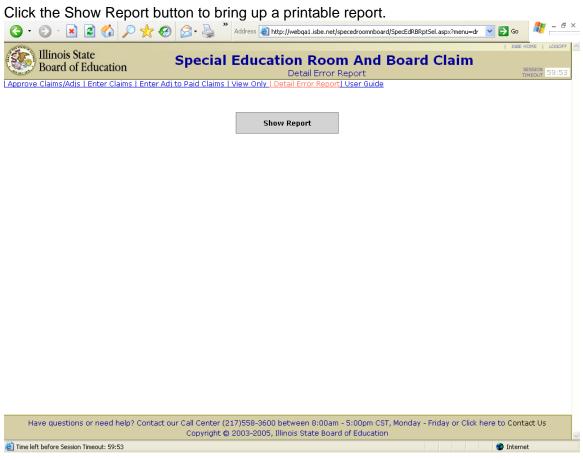
- 5. Enter the net per Diem amount paid for room and board (to 2 decimal places), if other than listed.
- 6. The recalculated claim amount and resulting adjustment will be calculated automatically and are NOT enterable.
- 7. Click the Update link in column one to save the data you just entered as a draft and the record will be edited for errors. **OR**
  - c. If you do not wish to continue on a row and have your entry saved, click Cancel.
  - d. Click delete on any draft adjustment record to remove it from the adjustment file.
  - e. Once you are done entering all applicable rows in the grid, click on the checkbox at the end of each error-free row to submit to the District Superintendent (if Document Author or Co-op Doc Author) or to ISBE (if District Administrator). You may select all rows in the grid on the page showing by clicking on the checkbox at the top of the column next to the Status column.

### F. View Only

The grid on this page will display all claims and adjustments on file for **view only** according to the Selection Criteria.

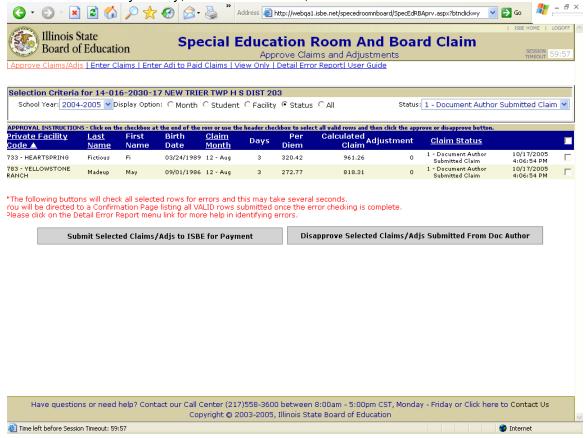


# G. Detail Error Report



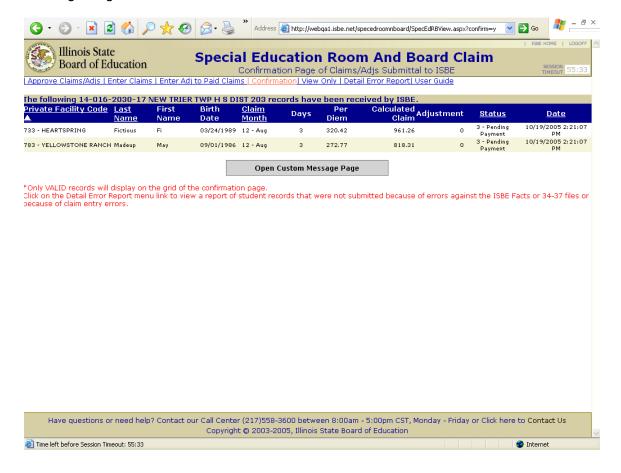
# H. APPROVE CLAIMS/ADJS (for District Admin ONLY)

- 1. At the top of the webpage is a Selection Criteria section which will automatically default to status of Document Author Submitted and will fill the grid with all claims and adjustment to claims ready for approval.
- 2. **Grid column headings that are underlined indicate a sort able field** and will toggle between ascending and descending order. The Approve Claims/Adjustments grid can be sorted by facility, student last name, claim month or claim status.



### I. Confirmation Page of Claims/Adjustments Submittal to ISBE (for District Admin ONLY)

A confirmation screen will be displayed after you click the submission button on any entry or approval screen. The confirmation screen is a display of all records just submitted to and received by ISBE. An IWAS mail message will automatically be sent to all users for the district stating the number of claim records approved and how to view them. The district administrator may also send a custom message to all users in the district by clicking on the Open Custom Message Page.



# J. Custom Message Page (for District Admin ONLY)

When the district administrator approves any claim, a mail message is automatically generated, notifying all district users of the number of claims approved. BUT, the district administrator may also send a custom message to all users in the district.

