

# High Cost Special Education Aid Overview

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## Program Summary

WHAT IS HIGH COST  
SPECIAL EDUCATION AID?



## Agenda

- Program summary
- Eligibility
  - Costs
  - Students
- Maximizing Revenue
- Claim software



## High Cost Basics

- Prior year reimbursement
- 70 % of Actual Additional Costs for one student over \$30,000 after deductions
- Fixed pot of money-prorated payments
- Paid in June
- Cannot receive w/ Supplemental SPED Aid



## Eligible Actual, Additional Cost

...is a cost that would not exist but for the need to provide special education and related services to one particular student with disabilities, above and beyond the costs for all other students with disabilities served by the LEA.



## Eligibility

WHICH STUDENTS ARE ELIGIBLE FOR HIGH COST SPECIAL EDUCATION AID?

WHAT COSTS ARE ELIGIBLE?



## Eligibility Questions to Consider

- Was a position increased or created to serve the student?
- Did you have to create a program specific to their disability when they enrolled?
- Does the IEP specify equipment or services you would not otherwise have available?
- If the student left the district, would the cost go away?

*The more firmly you can answer these with "yes,"  
the more likely a cost is eligible.*



## Statutory Definition

Total non-administrative special education and related services costs for a student

- State Special Education & SAP Aid
- Federal IDEA Funding
- Medicaid reimbursement

\$30,000 or more

§115.881 (1), Wis. Stats.



## Base Toward Eligibility

- Problem: How to allocate shared staff/costs?
- Cross-categorical teachers
- Speech & Language therapy
- Occupational Therapy (OT) & Physical Therapy (PT)
- Supplies



## Base Toward Eligibility

Represents shared program costs

- Cross-categorical teachers, substitutes & classroom aides
- Assessments & evaluations
- OT, PT, Audiology & Speech/Language therapy
- Shared materials & supplies
- Transition coordinators
- Pupil services
  - Guidance, psychologist, school nurse, social work



## Base Toward Eligibility

Solution: Give credit towards eligibility for students enrolled in a typical program

- First part (currently \$11,900) assumed to cover these costs
- Next part (currently \$18,100) covers child-specific services
- Not applied to students in special education focused schools



## Exceptions to the Base

Full-time “special education school” placement

- CESA/CCDEB school (e.g. Syble Hopp, Lakeland, Turning Point)
- Private school (Richardson, Lad Lake, ODTG)
- Elmbrook SD Fairview South & SEDA 2r in Milwaukee
- Out-of-state public school

No base applied but full tuition/cost is eligible, including any services in the base credit.



## Exceptions to the Base

### Open Enrollment “Tuition”

No longer in effect for 2016-17 students / 2017-18 claims



## Eligible Student-Specific Costs

- Nursing services (position for this student only)
- Orientation & Mobility services
- Specialized transportation
- Transition services
- Tuition



## Eligible Student-Specific Costs

- Instructional or transportation aides
- Attendant care aides
- Hearing (HI) or Visual Impairment (VI) instruction
- Educational Interpreter
- Extended School Year (ESY)



## Additional Eligible Student-Specific Costs

- Construction or renovation
- Non-HI / VI instruction
- Equipment
- Materials or supplies
- Technology

These require the submission of supporting documentation



## Additional Eligible Student-Specific Costs

- Vehicle modification
- Vehicle purchase/lease in lieu of contracting
- Other student-specific costs

These require the submission of supporting documentation



## Maximizing Revenue

HOW DOES HIGH COST SPECIAL  
EDUCATION AID INTERACT WITH  
OTHER STATE AND FEDERAL  
FUNDING SOURCES?



## Costs for Multiple Students

- Cost shared by small group of students with a particular disability or need
  - ❖ Examples:
    - Teacher with specific expertise/certification
    - Attendant care aide
    - Self-contained program ("school within a school")
- Every request reviewed separately
- Approvals specific to that request and LEA



## How Funding Stacks

### "Below the Line" – Base Cost & Grant Funds

- First \$30,000 is base cost (if any) + grant funds
- Extra grant funds shift costs below the \$30,000 threshold

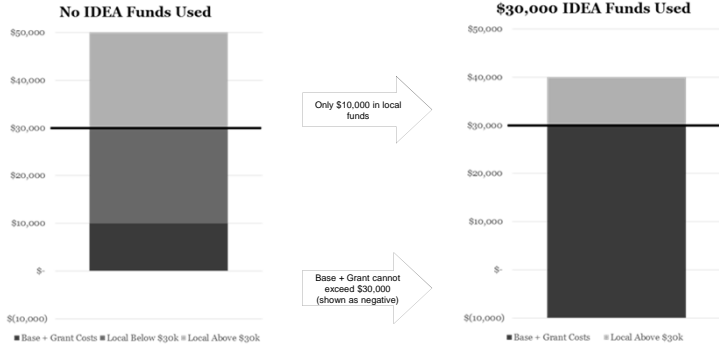
### "Above the Line" – SPED/SAP Aid & Medicaid SBS

- Special Education/SAP Aid and Medicaid SBS reimbursement offset local costs above the \$30,000 threshold
- High Cost would only cover 70% (or less) of what you'd receive without those deductions



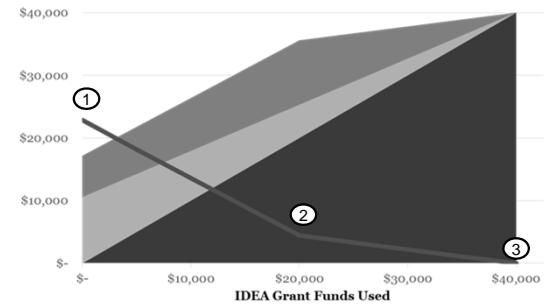
## "Below the Line" - Using IDEA Funds

(In this example the base is assumed to be \$10,000 and total spending \$40,000)



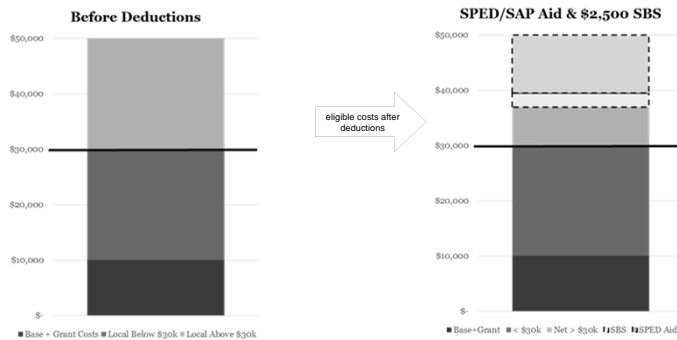
## Local Cost Impact of Using IDEA Funds

Student in local school with \$40,000 in costs



## "Above the Line" - Aid Deductions

(In this example the base is assumed to be \$10,000 and total local spending \$40,000)



## Local Cost Impact of Using IDEA Funds Scenario 1: All Local Dollars

Unadjusted Actual, Additional Costs		Eligible Costs	
Aidable costs	40,000.00	Adjusted costs	41,500.00
Non-aidable costs		Eligibility threshold	(30,000.00)
Grant-funded costs		Subtotal	11,500.00
<b>Total Unadjusted Costs</b>	<b>40,000.00</b>	Eligibility percentage	70.00%
<b>Adjusted Costs</b>		<b>Total Eligible Costs</b>	<b>8,050.00</b>
Adjusted Base		Added benefit	
Base cost	11,900.00	Estimated Payment reduced	
Grant-funded costs	-	Estimated Payment reduced by IDEA funds	
Subtotal	11,900.00	Eligible costs exceed threshold	8,050.00
Lesser of subtotal or \$30,000	11,900.00	Estimated Payment reduced by SPED Aid proration	100.00%
<b>Local Costs</b>		<b>Total Estimated Payment</b>	<b>8,050.00</b>
Aidable costs	40,000.00	Net Local Cost	21,550.00
Non-aidable costs	-		
Subtotal	40,000.00		
<b>Deductions</b>			
Estimated SPED/SAP Aid proration	26.00%		
Estimated SPED/SAP Aid deduction	(10,400.00)		
<b>Total Adjusted Costs</b>	<b>41,500.00</b>		

Assumes no Medicaid Reimbursement or Tuition Arrangement

## Local Cost Impact of Using IDEA Funds Scenario 2: Grant Dollars = Threshold Less Base

Unadjusted Actual, Additional Costs	
Aidable costs	21,900.00
Non-aidable costs	
Grant-funded costs	18,100.00
<b>Total Unadjusted Costs</b>	<b>40,000.00</b>
Adjusted Costs	
<i>Adjusted Base</i>	
Base cost	11,900.00
Grant-funded costs	18,100.00
Subtotal	30,000.00
Lesser of subtotal or \$30,000	30,000.00
<i>Local Costs</i>	
Aidable costs	21,900.00
Non-aidable costs	-
Subtotal	21,900.00
<i>Deductions</i>	
Estimated SPED/SAP Aid proration	26.00%
Estimated SPED/SAP Aid deduction	(5,694.00)
<b>Total Adjusted Costs</b>	<b>46,206.00</b>

Eligible Costs	
Adjusted costs	46,206.00
Eligibility threshold	(30,000.00)
Subtotal	16,206.00
Eligibility percentage	70.00%
<b>Total Eligible Costs</b>	<b>11,344.20</b>
<i>Estimated Payment</i>	
Eligible costs	11,344.20
Estimated High Cost SPED Aid pror.	100.00%
<b>Total Estimated Payment</b>	<b>11,344.20</b>
Net Local Cost	4,861.80

Assumes no Medicaid Reimbursement or Tuition Arrangement

## Your Bottom Line

Using IDEA funds for a High Cost student always decreases your net local costs.

Scenario 2: Most efficient to use \$30,000 in IDEA funds minus base credit for in-district students; \$30,000 for out-of-district placements (with no base).

Balance with other non-aidable (019) district costs in grants



## Local Cost Impact of Using IDEA Funds Scenario 3: All Grant Dollars

Unadjusted Actual, Additional Costs	
Aidable costs	
Non-aidable costs	
Grant-funded costs	40,000.00
<b>Total Unadjusted Costs</b>	<b>40,000.00</b>
Adjusted Costs	
<i>Adjusted Base</i>	
Base cost	11,900.00
Grant-funded costs	40,000.00
Subtotal	51,900.00
Lesser of subtotal or \$30,000	30,000.00
<i>Local Costs</i>	
Aidable costs	-
Non-aidable costs	-
Subtotal	-
<i>Deductions</i>	
Estimated SPED/SAP Aid proration	26.00%
Estimated SPED/SAP Aid deduction	-
<b>Total Adjusted Costs</b>	<b>30,000.00</b>

Eligible Costs	
Adjusted costs	30,000.00
Eligibility threshold	(30,000.00)
Subtotal	-
Eligibility percentage	70.00%
<b>Total Eligible Costs</b>	<b>-</b>
<i>Estimated Payment</i>	
Eligible costs	-
Estimated High Cost SPED Aid proration	100.00%
<b>Total Estimated Payment</b>	<b>-</b>
Net Local Cost	-

Assumes no Tuition Arrangement

## Your Bottom Line

Identify SPED/SAP aid eligible costs wherever possible in private placements.

Can you request itemized billing for aid-eligible contracted services such as properly licensed one-on-one aides?



## Your Bottom Line

Losing High Cost eligibility due to Medicaid SBS or SPED/SAP aid does not leave you worse off.

High Cost “claws back” 70% of SBS revenue.



## Claim Software


HOW DO I SUBMIT STUDENTS  
AND COSTS FOR HIGH COST  
SPECIAL EDUCATION AID?




## Run Your Own Scenarios

**School  
Financial  
Services  
Team  
provides an  
estimate  
worksheet** ⇒

### Quick Links

[Program Guidance \(for 2016-17 claims/2015-16 costs\)](#)   
Defines the costs eligible to be requested for reimbursement in a claim and provides additional detail on the program. Updates for 2016-17:

- Base credit toward eligibility increased to \$11,900
- Claims submitted by the FAPE agency
- New criteria for multi-student, low-incidence costs
- Added 10% deduction for private tuition admin/overhead

[Estimate Worksheet \(for 2016-17 claims/2015-16 costs\)](#)   
An Excel workbook that allows the user to estimate the amount of aid it may expect to receive. Claims are not submitted with this worksheet. An estimate made with this worksheet is based upon the user's assumptions and is **not** a funding guarantee.

[Special Education Web Portal](#)  
Claims are submitted through the Special Education team's web portal.

<https://apps4.dpi.wi.gov/seportal/Pages/SignIn.aspx>

WISCONSIN DEPARTMENT OF  
**PUBLIC INSTRUCTION**

Special Education Web Portal

Login ID:  Case insensitive [Special Education Home Page](#)

Password:  Case sensitive [Special Education Web Portal Overview](#)

Data Disclaimer: The Department of Public Instruction (DPI) has made a reasonable effort to ensure that the data available through the Special Education Web Portal is accurate, complete, comprehensive and secure. Most users of the Special Education Web Portal have access to confidential information about students. The data accessible in this portal are specifically for internal use and analysis and shall not be shared. Protecting student privacy is required by law and is the highest priority of the Wisconsin Department of Public Instruction. By using this resource you acknowledge your responsibilities to maintaining student data privacy and confidentiality. Resources regarding the protection of student privacy in Wisconsin are provided at <http://dpi.wi.gov/wise-data-privacy>

Not yet moving to WISEgrants, staying on the old  
Special Education Web Portal with Maintenance of Effort



# Special Education Web Portal



## Special Education Web Portal - Main Menu

6069-Washington School District

Help	LEA Data (Click on link below to see data in district profile.)	Required Action	Required Action Due Date
?	<a href="#">Indicator 7 - Child Outcomes</a>	Enter Data	09/01/2016
?	<a href="#">Procedural Compliance Self-Assessment Report</a>	None	N/A
?	<a href="#">Indicator 11: Timely Initial Evaluations</a>	None	N/A
?	<a href="#">Disproportionality: Procedural Compliance Self-Assessment</a>	None	N/A
Help Application			
?	<a href="#">IDEA Flow-through and Preschool Entitlement Budgets &amp; Claims</a>		
	<a href="#">High Cost Special Education Aid Claims</a>		
	<a href="#">IDEA Maintenance of Effort</a>		
	<a href="#">Form: Reporting confirmed fraud to DPI as required by the State Single Audit Guidelines</a>		

# Confirm or Add Contacts and Access



High Cost Main Menu | Special Education Portal | DPI Home | (Test Server) 5258 - Sharon J11 School District | 2015-2016

## Maintain High Cost Claim Contacts for District

Contact added.

DPI Consultant Assigned to District:

Minimal contact requirements have been met. You may add additional contacts or proceed to the budget menu.

Edit	Delete	Contact Type	Contact Name	Telephone No	Email Address
Edit	Delete	IDEA Budget Contact	Donna Noble	(262) 555-9876	<a href="mailto:donna.noble@sharon.k12.wi.us">donna.noble@sharon.k12.wi.us</a>
Edit	Delete	Business Office Contact	Michael Smith	(262) 555-9877	<a href="mailto:michael.smith@sharon.k12.wi.us">michael.smith@sharon.k12.wi.us</a>

[Budget Menu](#) [Add Contact](#)

This is typically who we contact if there any questions about your claim

# Confirm or Add Contacts and Access

## Maintain High Cost Claim Contacts for DI:

### Maintain User Information

First Name:    
 User Role:   
 E-mail Address:   
 Phone #:    
 District:

DPI Consultant Assigned to District:   
 Contact Type:   
 Contact Name:   
 Telephone Number:   
 Telephone Extension:   
 Email Address:   
 CC Budget Correspondence:   
 Receive Fiscal Listserv Messages:   
 Notes:

### Applications Available to User:

[High Cost Special Education Aid Claims](#)  
 [Indicator 11: Timely Initial Evaluations](#)

[Reset Password](#) [Update User](#) [Cancel](#)

[Add](#) [Cancel](#)

You need one contact designated as 'Business Office Contact' from the Contact Type list. You need one or more contacts of the type 'Budget Contact' from the Contact Type list.

# Claim Process Steps

- Add student(s)
- Add costs and upload (if required) documentation
- Add SBS Medicaid reimbursement
- Lock/submit claims
- Upload completed certification form



## Add Student Information

High Cost Main Menu | Special Education Portal | DPI Home | 1204 - Cornell School District | 2016-2017

Add New Student Information ?

First Name:

Last Name:

Birth Date:

Primary Disability:

Was Medicaid SBS billed for this student in the claim year?

LEA Providing Services:

*If the student is served by a private agency, or an agency outside Wisconsin, use your LEA for the item above.*

Cancel Save

**YES = Student was Medicaid eligible, parent provided consent for services, student received SBS and LEA claimed & received reimbursement.**

**NOTE: If you answer 'Yes' you will not be able to submit the claim without entering a claim value on the cost reporting page.**

## Actual Additional Cost Data

- Staff Position or Cost Item
- Program Assignment (function)
- Funding Source
  - Grant, Aidable, Non-Aidable
- Cost

## Complete Student Information and Save

High Cost Main Menu | Special Education Portal | DPI Home | 1204 - Cornell School District | 2016-2017

Add New Student Information ?

First Name:

Last Name:

Birth Date:

Primary Disability:

Was Medicaid SBS billed for this student in the claim year?

LEA Providing Services:

*If the student is served by a private agency, or an agency outside Wisconsin, use your LEA for the item above.*

Cancel Save

**NOTE: If you are paying tuition to a school or agency in Wisconsin that is not listed here, select tuition-private in the cost reporting section.**

## Add Student Costs

High Cost Main Menu | Special Education Portal | DPI Home | (Test Server) 0840 - Butternut School District | 2016-2017

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

User Info: User Name: Carey Bradley, Role: Application Administrator

2016-2017 Constants Used: Rpt. Rate: 70%, Avg. Funds: 45%, Cal. Ad. Costs: 25.1%, Treatment: \$50.00

Submit Student Claims: Claims: 1, Submitted: 0, Returned: 0, Approved: 0

Eligible Costs By Student: Student Name: Student Sample, Eligible Costs: Special\_Matrs: \$0.00, Other: \$0.00, TOTAL: \$0.00

Student Name: Student\_Sample, Birth Date: 1/1/2001, Claim Documentation: Administrative Add-On

Cost Item: Administrative Add-On, Function: 900000-Medicaid Eligible

Detailed Item Description:

Funding Source: Aidable - 011 or 019 via Aid Transit

Actual Additional Costs: Staff Position/Cost Item: Base Cost Toward Eligibility, Program Assignment: 900000-Wisconsin Funds, Funding Source: Grant Funds, Cost: 0.00

Select Cost Item

## Add Student Costs

**PUBLIC INSTRUCTION**

Education Portal | DPI Home | (Test Server) 0840 - Butternut School District | 2016-2017

Student Name: Student\_Sample Birth Date: 1/1/2001 Claim Documentation

Staff/Position: Aide - Instructional (Paraprofessional) Function: 436000-Contracted Instruction

PLEASE NOTE: The Educ. 159100-Program Aides is requiring a DPI license. All other positions require the name of the staff member. Failure to enter a required EFN may result in follow-up by the Department of Public Instruction.

License Number (EFN): Special Education FTE: 0.01 - 1.00 Staff First Name: Last Name: Funding Source: Aidable - 011 or 019 via Aid Transit Item Cost:

Back Add **Aidable - 011 or 019 via Aid Transit** Non-Aidable - All Other 019 Grant-Funded or Base Cost

Select Function and Funding Source

## Costs

Verify services with Special Education Office

Verify funding with Business Office

Staff Position/ Cost Item	Program/ Assignment	Funding Source	Cost Action
Spec. Transportation (Didn't have SBS)	256750-Contracted Transportation	Aidable - 011 or 019 via Aid Transit	\$10,000.00 <a href="#">Edit</a>
The student is the only one on the specialized transportation route.			
Aide - Instructional (Paraprofessional)	436000-Contracted Instruction	Aidable - 011 or 019 via Aid Transit	\$30,000.00 <a href="#">Edit</a>
	SAMPLE STAFF	0.75	
Administrative Add-On	990000-Not Medicaid Eligible	Grant-Funded or Base Cost	\$11,900.00 <a href="#">Edit</a>
Base Cost manual addition for correct value			

## Costs, Deductions and Eligibility

Staff Position/ Cost Item	Program/ Assignment	Funding Source	Cost Action
Spec. Transportation (Didn't have SBS)	256750-Contracted Transportation	Aidable - 011 or 019 via Aid Transit	\$10,000.00 <a href="#">Edit</a>
The student is the only one on the specialized transportation route.			
Aide - Instructional (Paraprofessional)	436000-Contracted Instruction	Aidable - 011 or 019 via Aid Transit	\$30,000.00 <a href="#">Edit</a>
	SAMPLE STAFF	0.75	
Administrative Add-On	990000-Not Medicaid Eligible	Grant-Funded or Base Cost	\$11,900.00 <a href="#">Edit</a>
Base Cost manual addition for correct value.			

Deductions	Funding Source	Deduction/Action
State Special Education Aid	Aidable - 011 or 019 via Aid Transit	\$10,460.00

Eligibility Calculation		
Unadjusted Costs:		
Aidable Costs	\$40,000.00	
+ Non-Aidable Costs	\$0.00	
+ Grant-Funded Costs	\$11,900.00	
Total Unadjusted Costs	\$51,900.00	
Adjusted Costs:		
Base Cost Toward Eligibility	\$0.00	
+ Grant - Funded Costs	\$11,900.00	
Subtotal	\$11,900.00	
Adjusted Base (max. \$30,000.00)	\$11,900.00	
+ Aidable/Non-Aidable Costs	\$40,000.00	
- State SPED Aid @ 2% 15 %	-\$10,460.00	
- Medicaid SBS	\$0.00	
- Private Tuition 10% Admin	\$0.00	
Total Adjusted Costs	\$41,440.00	
Eligible Costs:		
Total Adjusted Costs	\$41,440.00	
- Eligibility Threshold	-\$30,000.00	
Subtotal	\$11,440.00	
x Eligibility Percentage	75.00 %	
Total Eligible Costs	\$8,580.00	

## Deductions

- State Special Education Aid (automatic)
- Medicaid SBS Reimbursement (entered by district)
- Private Tuition 10% Admin (automatic if private selected)

## Deductions Examples

### Deductions

Deduction Item	Funding Source	Deduction	Action
State Special Education Aid	Aidable - 011 or 019 via Aid Transit	\$10,460.00	

### Deductions

Deduction Item	Funding Source	Deduction	Action
Medicaid SBS Reimbursement	Other	\$300.00	<a href="#">Edit</a>
State Special Education Aid	Aidable - 011 or 019 via Aid Transit	\$10,460.00	

### Deductions

Deduction Item	Funding Source	Deduction	Action
Medicaid SBS Reimbursement	Other	\$300.00	<a href="#">Edit</a>
State Special Education Aid	Aidable - 011 or 019 via Aid Transit	\$10,460.00	
Private Tuition 10% Admin	Other	\$1,000.00	

## Submit and Certify

### Two Most Often Missed Steps

The screenshot shows the 'Public Instruction' system interface. The 'Main Menu' includes options like 'Add New Student', 'Download Claim Certification Form', and 'Upload Claim Certification Form/Document'. The 'Consultant Menu' includes 'Change District' and 'Add Notes for Selected District'. The 'Accountant Menu' includes 'Review Submitted Claims'. The 'Program Assistant Menu' includes 'Maintain Certification Lists', 'Review Submitted Claims', and 'Lock/Unlock Districts'. The 'Eligible Costs By Student' table shows a total of \$9.00 for 'Other' claims.

## Upload Documentation

- Certain Types of Cost require documentation
- Certification Form

## Eligibility Calculation

### Eligibility Calculation

Unadjusted Costs:		
Aidable Costs:		\$40,000.00
+ Non-Aidable Costs:		\$0.00
+ Grant-Funded Costs:		\$11,900.00
<b>Total Unadjusted Costs:</b>		<b>\$51,900.00</b>
Adjusted Costs:		
Base Cost Toward Eligibility:		\$0.00
+ Grant - Funded Costs:		\$11,900.00
<b>Subtotal:</b>		<b>\$11,900.00</b>
Adjusted Base (max. \$30,000.00):		\$11,900.00
+ Aidable/Non-Aidable Costs:		\$40,000.00
- State SPED Aid @ 26.15 %:		\$10,460.00
- Medicaid SBS:		\$0.00
- Private Tuition 10% Admin:		\$0.00
<b>Total Adjusted Costs:</b>		<b>\$41,440.00</b>
Eligible Costs:		
Total Adjusted Costs:		\$41,440.00
- Eligibility Threshold:		\$30,000.00
<b>Subtotal:</b>		<b>\$11,440.00</b>
x Eligibility Percentage:		70.00 %
<b>Total Eligible Costs:</b>		<b>\$8,008.00</b>

## Next Steps

- All claims are reviewed
- DPI consultant may follow up because of:
  - Missing/incomplete information (e.g. no certification form)
  - Additional documentation
  - Questioned costs
- Claims approved by student
- Payments determined in March/April
- Aid payments made in June



## Claims Submitted by FAPE Agency

### Claim submitted by resident district when

- Student attends a school in the district
- District initiates & pays for placement in another district, CESA, CCDEB, or private school

### Claim submitted by nonresident district when

- Student open enrolls from their resident district
- (Open Enrollment changed transferring all FAPE responsibilities to the non-resident district. FAPE & finances are fully linked)



## Changes for 2017-2018

WHAT CHANGES ARE COMING  
FOR 2017-2018 CLAIMS ?



## Resources

### DPI website:

<http://dpi.wi.gov/sfs/aid/special-ed/high-cost>

- Program Guidance document
- Estimate worksheet
- Video tutorial
- Payments

### DPI Contact:

Carey Bradley, School Financial Services  
[carey.bradley@dpi.wi.gov](mailto:carey.bradley@dpi.wi.gov) 608-267-9212

