



Department of  
**Education**

# Technical Guide: FY24 IDEA High Cost

Tennessee Department of Education | June 2024



# Contents

- Introduction..... 3**
- ePlan User Access..... 4**
  - Workflows .....4
- ePlan Data and Information Tool ..... 6**
  - Accessing the Data and Information Tool .....6
  - IDEA High-Cost Sections and Pages.....7
    - Change Log*.....7
    - History Log and Create Comment* .....8
    - Overview and Instructions*.....9
    - Cover Page*..... 10
    - High-Cost Submission Page*..... 10
    - Assurances*..... **Error! Bookmark not defined.**
    - Checklist*..... 15
  - Validations.....16
  - Submission.....17
  - How to Print in ePlan .....17
- Troubleshooting ..... 18**
  - User Access .....18
  - Validation Messages .....19
  - Post-Submission.....19
  - Inbox .....19

# Introduction

Additional funds for high cost students with disabilities are subject to the availability of federal funds as specified in Public Law 108-446 § 602(8) and 611(e)(3). **These additional federal funds are distributed to school systems based on special education expenditures from the General Purpose School Funds only.** These additional funds received by the local education agency (LEA) must be budgeted and expended as General Purpose Funds in the **71200** and **72220** series for audit purposes and included in the review for maintenance of effort. Please remember that Functionally Delayed and Intellectually Gifted are state disability categories and not federal; therefore, requests for reimbursement for these disabilities are **not** accepted.

A high-need child with a disability receives special education and related services identified in an individualized education program (IEP) that exceed the typical needs of a child with a disability thus creating a financial impact on the LEA. Only costs identified in the child's IEP are considered in determining whether a child is a high need child. The definition is aligned to the federal definition that ensures that the **cost of the high-need child with a disability is greater than 3 times the average per pupil expenditure in Tennessee** and takes into account the number and percentage of high-need children with disabilities served by an LEA as specified in §300.704(c)(3) state level activities.

High-cost or high-need students placed and served by the LEA require extensive and costly special education and related services that create a severe financial burden on the LEA. Additional funds will be used to assist in the provision of such a high-cost program when the additional cost is greater than three (3) times the state's average per pupil expenditures. **The percentage of reimbursement for High Cost is determined based on the available money in the state set-aside discretionary pool for the respective school year and the total amount approved by all LEAs for this category.** Approval will be determined after a review of the IEP(s) and the required supporting documentation for eligible direct expenditures.

When applying for high-cost reimbursement, LEAs will be allowed a maximum of 0.3% of the Dec. 1, 2022, census count for the **total** number of students ages 3-21 served. LEAs with a December census count of less than 600 will be allowed to submit up to two (2) high-cost student reimbursement requests. The Dec. 1, 2022, census count for the LEA is pre-loaded to the page in ePlan. The maximum number of allowable requests for the LEA is auto-calculated and will be pre-populated in the submission portal (ePlan). If these numbers are incorrect, please contact [Brett.Printz@tn.gov](mailto:Brett.Printz@tn.gov) for assistance.

To qualify for an IDEA high-cost reimbursement, the General Purpose expenditures must be three (3) times the state average per-pupil expenditure for FY23 for the 2022-23 school year [Section 611(e)(3)(C)]. The state average per-pupil expenditure information is also located on the TN State Report Card. The state average per-pupil expenditure amount has been calculated. The amount is \$11,800.08 for Fiscal Year 2023. Three times the state's average per pupil expenditures is \$35,400.24. This is the minimal threshold amount of expenditures in order to submit an IDEA high-cost student reimbursement application for consideration for FY24 IDEA High Cost.

The FY24 IDEA High-Cost tool can be accessed through the Tennessee Department of Education's online grants management platform, [ePlan.tn.gov](https://ePlan.tn.gov).

# ePlan User Access

All users must have the correct ePlan user access role to access and complete the FY24 IDEA High-Cost tool. Users with existing ePlan access can verify current user access roles in the Address Book. To view existing access, visit [ePlan](#) and navigate to the **Address Book** and **LEA Role**.

New ePlan users and existing ePlan users who need to request a User Access role must request the additional role using the appropriate **ePlan User Access Form**. Access the form by navigating to [ePlan > TDOE Resources](#) > 1. User Access Forms and select the correct form according to organization type, or click on the link below:

- [ePlan User Access Form for LEAs](#)

Users do not need to log in to ePlan to access *TDOE Resources* in ePlan. Follow the instructions on the *User Access Form*, then email the completed form to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov) to request additional access roles. User access requests may take up to two business days to process. Users will receive an email reply when access has been granted.

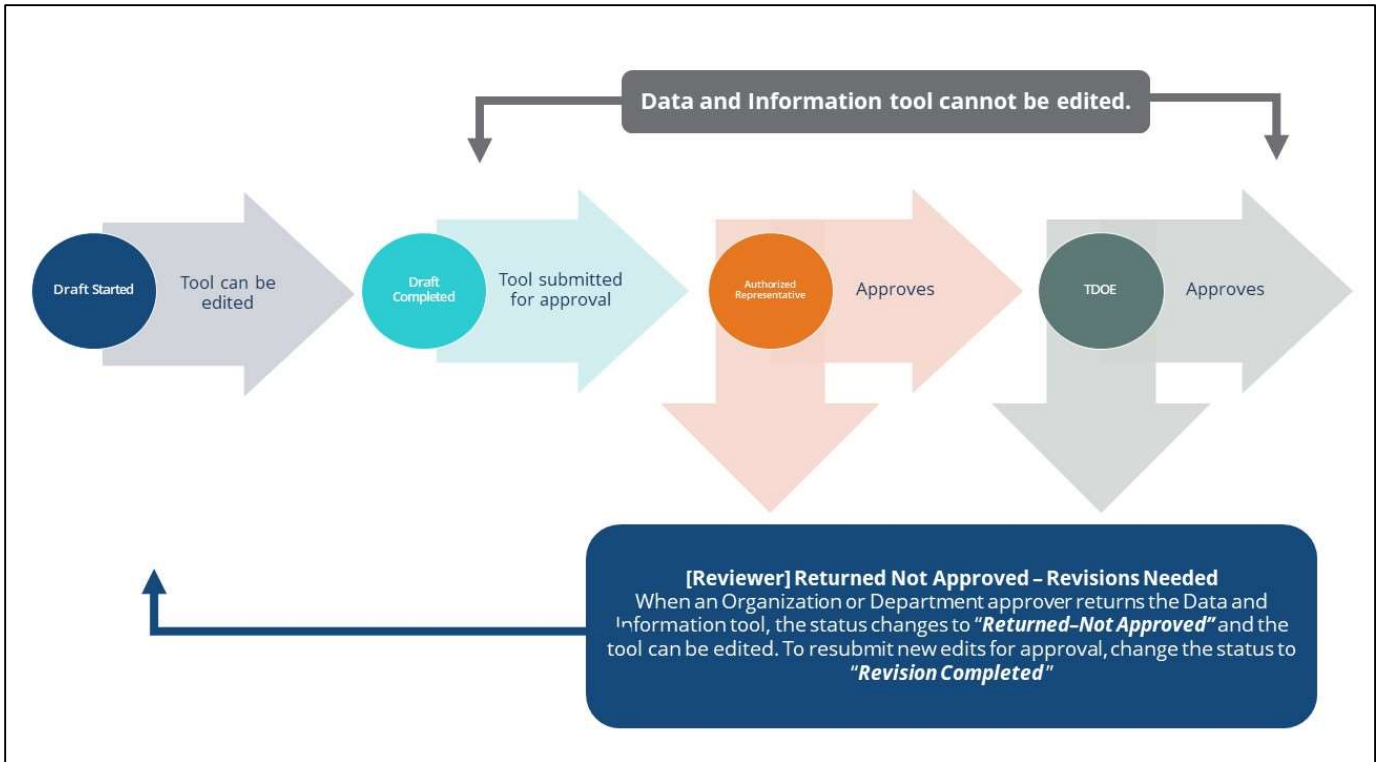
IDEA Directors who had existing roles in ePlan prior to July 2024 were grandfathered in with the new IDEA High-Cost role.

## Workflows

Below are the roles and the order of the workflow steps for the data and information process. These roles and the workflow may vary slightly for specific programs.

ePlan Role	ePlan Function
<b>LEA IDEA High-Cost Director</b>	Click <b>Draft Started</b> (or <b>Revision Started</b> for revisions) Respond to questions, upload files, etc.
<b>LEA IDEA High-Cost Director</b>	Click <b>Draft Completed</b> (or <b>Revision Completed</b> for revisions)
<b>LEA Authorized Representative</b> (Director of Schools)	Click <b>LEA Authorized Representative Approved</b> (or <b>LEA Authorized Representative Not Approved</b> )
<b>TDOE IDEA High-Cost Consultant</b> (Department project consultants)	Click <b>TDOE IDEA High-Cost Consultant Reviewed</b> (or <b>TDOE IDEA High-Cost Director Returned Returned</b> )
<b>TDOE IDEA High-Cost Director</b> (Department project directors)	Click <b>TDOE IDEA High-Cost Director Approved</b> (or <b>TDOE IDEA High-Cost Director Returned Not Approved</b> )

After each status change, ePlan automatically sends a notification email to all users in the LEA who have the ePlan role in the next step in the process. High-Cost reimbursements cannot be allocated to the LEA until approval is received from the TDOE Program Director. This approval status means there is a potential to pay submissions requested by the LEA.



# ePlan Data and Information Tool

## Accessing the Data and Information Tool

To navigate to applications from the ePlan homepage, click the **Data and Information** tab on the left menu bar.

**NOTE:** For users with ePlan roles for multiple organizations, return to ePlan home to select the correct organization before proceeding to Data and Information.



Select the desired fiscal year from the dropdown in the upper left corner of the screen. Data and information tools are stored in ePlan according to the state fiscal year (i.e., 2024 indicates the 2023–24 school year). Click on the [Data and Information](#) tool name link: **IDEA-High Cost** to access the tool. The **IDEA High-Cost tool will be in the Fiscal Year 2024.**

Data and Information			
Test County (777) Public District - FY 2024			
2024	Active		
Data and Information	Revision	Status	Status Date
Acknowledgement of Allocation Adjustment	0	LEA Authorized Representative Approved	5/1/2024
Alternative Education Survey	0	Not Started	5/15/2024
Civil Rights and Bullying Compliance Report	0	Not Started	4/30/2024
Comparability	0	TDOE FPO Divisional Coordinator Reviewed	12/27/2023
Coordinated School Health Action Plan	2	LEA Coordinated School Health Action Plan Director Revision Completed	5/14/2024
CTE Special Programs of Study	0	Not Started	1/9/2024
Data Report for Students with Disabilities	0	TDOE Data Report for Students with Disabilities Director Approved	12/1/2023
Education Stabilization Fund - ESSERF Data Collection	0	TDOE Education Stabilization Fund - ESSERF Data Collection Director Reviewed	5/6/2024
Excess Cost Data Collection Tool	0	TDOE Director Approved	5/16/2024
Extended Learning End of Year Report	0	Not Started	5/15/2024
Extended Learning Mid-Year Report	0	TDOE Extended Learning Mid-Year Report Director Approved	2/7/2024
Federal Program Waiver Request	0	Not Started	7/31/2023
Grant Award Notifications	0	Not Started	2/14/2024
Homeless Immunization Report	0	TDOE Homeless Immunization Report Director Approved	5/10/2024
IDEA High Cost	0	Not Started	5/23/2024
IDEA State Special School Transportation Reimbursement	0	Not Started	5/23/2024
McKinney-Vento Subgrant Closeout Report	0	Not Started	5/28/2024
N & D Child Count Subpart 2	0	TDOE N & D Child Count Subpart 2 Consultant Reviewed	11/27/2023
Non-Public School Survey	0	TDOE Non-Public School Survey Director Approved	2/23/2023
Parental Leave	0	LEA Authorized Representative Approved	5/22/2024
Perkins V Comprehensive Local Needs Assessment (CLNA)	0	TDOE Perkins V Comprehensive Local Needs Assessment (CLNA) Consultant Reviewed	2/5/2024
Physical Activity Compliance Report	0	TDOE Physical Activity Compliance Report Director Approved	4/17/2024
Prayer Certification	0	Submitted	8/28/2023
Results-Based Monitoring Risk Analysis	0	TDOE Results-Based Monitoring Risk Analysis Director Approved	8/25/2023
Summer Programming Waiver	0	TDOE Summer Programming Waiver Director Reviewed	4/2/2024

The IDEA High-Cost tool loads to the [Sections](#) page. To begin completing the tool, next to **Change Status To:** click on **Draft Started**.



## IDEA High-Cost Sections and Pages

The Sections page lists all the available sections and pages within the FY24 IDEA High-Cost tool. The Sections page helps navigate to the specific sections and pages which must be completed.

### IDEA High Cost Sections

Test County (777) Public District - FY 2024 - IDEA High Cost - Rev 0

Status: **Not Started**

Change Status To: [Draft Started](#)

[View Change Log](#)

Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )	Validation	Print ■ Select Items
All	<a href="#">Messages</a>	<a href="#">Print</a>
[-] <b>History Log</b>		<a href="#">Print</a>
<a href="#">History Log</a>		<a href="#">Print</a>
<a href="#">Create Comment</a>		
[-] <b>IDEA High Cost</b>	<a href="#">Messages</a>	<a href="#">Print</a>
<a href="#">Overview and Instructions</a>		<a href="#">Print</a>
<a href="#">Cover Page</a>		<a href="#">Print</a>
<a href="#">IDEA High Cost Reimbursement</a>	<a href="#">Messages</a>	<a href="#">Print</a>
<a href="#">Related Documents</a>	<a href="#">Messages</a>	<a href="#">Print</a>
<a href="#">Assurances</a>		<a href="#">Print</a>
[-] <b>Checklist</b>		<a href="#">Print</a>
<a href="#">IDEA High Cost Checklist</a>		<a href="#">Print</a>
All	<a href="#">Messages</a>	<a href="#">Print</a>

[Return](#)

## Change Log

The *Change Log* may be accessed on the main sections page of the IDEA High-Cost tool. It lists every change or update since the previous status. This helps users identify changes that have been made to the IDEA High-Cost tool since they last viewed it. More information about the *Change Log* is available in the ePlan User Manual.

### Sections

Public District - FY - Program - Rev 0

Application Status: **Not Started**

Change Status To: [Draft Started](#)

[View TDOE History Log](#)  
[View Change Log](#)

Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )
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## History Log and Create Comment

The *History Log* contains a record of status changes and comments made on the IDEA High-Cost tool. ePlan users may want or need to create a comment in an ePlan IDEA High-Cost tool for one of the following reasons:

- To explain a part of the IDEA High-Cost tool history.
- To provide information that a user cannot add to the IDEA High-Cost tool due to the IDEA High-Cost current status (users can only edit data and information tools that are in a *Draft Started* or *Revision Started* status.)

ePlan creates a running record of all comments. Any comment created and saved in the IDEA High-Cost tool will always be available as a part of its history log.

### To add a Comment in the IDEA High-Cost tool:

1. Navigate to the IDEA High-Cost tool's main *Sections* page.
  - To navigate to the main IDEA High-Cost tool page from other pages in the IDEA High-Cost tool, click **Go To** and **Sections** as shown and highlighted below.
2. Select **Create Comment** from under the *History Log* on the main section page as highlighted in the screenshot below to navigate to the *Create Comment* page.
3. On the *Create Comment* page, type your comment in the box.
4. If desired, a hyperlink can be inserted in a comment by clicking the hyperlink icon.
5. To send an email notification of this comment to recipients, check the box next to **Send Email to ePlan Contacts** below the main comment box.
  - Sending an email notification is not required to create the comment.
  - If no email notification is needed, click **Save and Go To** to exit the page. The comment is now a part of the IDEA High-Cost tool *History Log* for everyone to view.
6. **To send an email notification:** Select the recipients to receive notification of the comment from the lists provided and then click **Add**.

### Available Contact Groups

<b>LEA Contacts by Funding Application</b>	Available if a contact is selected on the application's contact page. Not all funding applications have contacts on the contact page.
<b>LEA Contacts by Role</b>	Current users with the applicable role
<b>Other LEA Contacts</b>	Additional contacts for an LEA
<b>TDOE Contacts</b>	State users that can complete various ePlan functions.
<b>TDOE Miscellaneous Contacts</b>	Lists every State ePlan User by name
<b>Additional Recipients</b>	Allows you to type in any additional email addresses manually

- It is a good practice to send a copy of your comment to yourself to let you know when the message has been delivered.
7. The *Recipient Summary* shows who will receive the email.
  8. Clicking **Save And Go To** will send the comment notification.
  9. Comments with email notifications can be accessed from the *Inbox* on your ePlan tab in addition to the *History Log* of the IDEA High-Cost tool. Additional information about Inbox functionality in ePlan is available in Troubleshooting, [Inbox](#).



## Overview and Instructions

The overview and instructions page explains the IDEA High-Cost program and provides instructions for completing the High-Cost tool in ePlan. A confirmation box will need to be checked here for any submissions.

### Overview And Instructions

Additional funds for very high-cost students with disabilities are subject to the availability of federal funds as specified in Public Law 108-446, Section 602(8) and 611(e)(3). These additional federal funds are distributed to local educational agencies (LEAs) based on special education expenditures from the General Purpose School Funds only. These additional funds received by the LEA must be budgeted and expended as General Purpose Funds in the 71200 and 72220 series for audit purposes and included in the review for maintenance of effort.

Please Note: State disability categories of functionally delayed and intellectually gifted may not be submitted for high-cost reimbursement. The U.S. Office of Special Education does not recognize these two categories and federal IDEA funding is not received for these categories.

For more information about the State of Tennessee's definition of functionally delayed, see the [Standards for Special Education Evaluation & Eligibility](#).

For more information about the State of Tennessee's definition of intellectually gifted, see the [Intellectually Gifted](#) page.

\* **IDEA High Cost Expenses** - Check to acknowledge IDEA High Cost expenses must be greater than **\$35,400.24**.

### ePlan Instructions

To request IDEA High-Cost Reimbursement, complete the **IDEA High Cost** page of this data and information tool. Further instructions about allowability are available on this page.

On the **Related Documents** page, upload all supporting documentation for each requested student. Upload one file per student request, (identified by student number) with PII redacted. Supporting documentation should include invoices, receipts, time and effort documentation, transportation logs and any other relevant documentation.

Complete the **Assurances** page.

The local educational agencies Director of Schools must approve the submission before it is sent to the department for review.

For more detailed instructions, please see the [IDEA High-Cost Technical Guide](#).

If you have any further questions, please contact [Brett.Printz@tn.gov](mailto:Brett.Printz@tn.gov)

### Resources

[Click here to open the technical guide.](#)

## Cover Page

The [Cover Page](#) requires LEAs to enter general organization information and contact information for the IDEA High-Cost program points of contact. Once all fields are complete, hover over the **Save And Go To** button and click on **Sections** to return to the [Sections](#) page.

<b>Local Educational Agency Details</b>
* LEA Number <input type="text"/>
* LEA Name <input type="text"/>
<b>IDEA High Cost Point of Contact</b>
* IDEA High Cost Point of Contact Name <input type="text"/>
* IDEA High Cost Point of Contact Email Address <input type="text"/>
* IDEA High Cost Point of Contact Phone Number <input type="text"/>

## IDEA High-Cost Reimbursement Page

The IDEA High-Cost tool requests information about high-need students under one state high-cost category. There are different types of high need students that could fall into this category. LEAs will be at least be able to submit a total of two submissions this year choosing among the various types. LEAs must provide specific information about students in the IDEA High-Cost Reimbursement submission page filling out data and answering questions related to the high-need student. The [Related Documents](#) page for each submission is where the LEA will upload necessary IEP documents, a supporting summary page, and supporting financial documentation for each student for which the LEA seeks reimbursement.

Allowable expenditures for determining a high-cost student are:

- One-on-one assistance.
- Specialized equipment specific to the student and required to provide free and appropriate public education (FAPE).
- Special transportation exceeding requirements of special education buses/vans.
- Cost of contractual services for an eligible student.
- Other

Non-allowable expenditures for determining a high-cost student are:

- Pro-rated salaries for teachers or teaching assistants already providing special education services.
- Pro-rated salaries of related services personnel already providing services.
- Pro-rated salaries of special education bus drivers and attendants already providing services.
- Pro-rated time of director, supervisor, principal school psychologist, and/or counselor for administrative duties, meetings, etc.
- Specialized equipment/materials already provided by the LEA.
- Legal fees.
- Depreciation of equipment.

## 1<sup>st</sup> Type of High-Cost Student: Students Placed in an SDOE Special School

Tennessee Department of Education State Special Schools include Tennessee School for the Blind (TSB), Tennessee School for the Deaf (TSD), and West Tennessee School for the Deaf (WTSD). When students are

placed through appropriate procedures in a Tennessee Department of Education Special School, the LEA of residence may be required to provide additional services to ensure that each student has an appropriate special education program. Since LEAs do not generate state or federal funds for these students, the amount expended by the LEA may be paid by high-cost funds as available without factoring the LEA's general purpose per pupil or federal per pupil for the year.

LEAs can request IDEA high-cost reimbursement for students who fit this type if the student also meets having enough direct general purpose expenditures of three times the state's average per pupil expenditures of \$35,400.24. These must be costs associated with the students placed in state special schools not already paid by the state. If requesting reimbursement, the LEA must choose either the IDEA State Special School Transportation Reimbursement Request for IDEA Part B high cost Reimbursement Request for the special needs student, with assurances that only one application is being utilized for the high-need student for SY2023-24.

When applying LEAs will be allowed a maximum of 0.3% of the December 1, 2022, census count for the total number of students served. LEAs with a December census count of less than 600 will be allowed to submit up to two (2) high-cost students for the IDEA High Cost.

For each Type 1 IDEA High-Cost student, provide the following:

- State Student ID
- Student DOB
- State Special School
- The Disability/ies documented on the student's IEP
- The IEP date(s) for the services provided in Related Documents
- Documentation of total General Purpose expenditures incurred by the LEA (for up to five services)
  - The Service types
  - The Service frequency
  - The Service time period
  - The Service expenditure

A drop down selection of service types can be chosen for what is the most appropriate expense type. ePlan auto-calculates the total student expenditure for each student after entry.

- Click the box if "The student was placed by a state agency (DCS, DHS, DMH, DOH) or attended a state special school (TSB, TSD, WTSD)."

For the supporting documentation template page that summarizes the general purpose direct expenditures, the LEA must use the appropriate provided tab (SSS IDEA High Cost) to help summarize their supporting financial documentation. A review will be done utilizing the IEP(s), Supporting Document Template Page, and Supporting Documentation in order to verify all requested reimbursements for expenditures. Failure to provide adequate documentation can result in denial or partial award of a LEA's qualifying reimbursement amount for the high cost student.

**Note:** Do not submit more high-cost students than the maximum allowable for the LEA. If the LEA's maximum is two, the LEA may only submit at most two submissions regardless of type.

## **2<sup>nd</sup> Type of High-Cost Student: Students Placed by a State Agency (Out-of-System Resident)**

This includes such state agencies as the Department of Human Services, the Department of Mental Health, the Department of Children's Services, and/or the Department of Health. This only applies to those students placed by a state agency for the first year of service in an LEA. After the first year, those students generate state and federal dollars as any other student with a disability in the LEA.

When out-of-system students with disabilities are placed in a group or foster home in an LEA which is not the resident system, the LEA where the students are placed is to follow the required procedures and provide the appropriate educational services. After the first year, these students are reported on the census and may then become Priority 3. Any additional funds received are based on the additional cost of the program.

LEAs can request IDEA high-cost reimbursement for students who fit this type if the student also meets having enough direct general purpose expenditures of three times the state's average per pupil expenditures of \$35,400.24. Since LEAs do not generate state or federal funds for these students, the amount expended by the LEA may be paid by high-cost funds as available without factoring the LEA's general purpose per pupil or federal per pupil for the year.

When applying LEAs will be allowed a maximum of 0.3% of the Dec. 1, 2022, census count for the total number of students served. LEAs with a December census count of less than 600 will be allowed to submit up to two (2) high-cost students for the IDEA High Cost.

For each Type 2 IDEA High-Cost student, provide the following:

- State Student ID
- Student DOB
- School attended in 2023-24
- Agency with legal custody of Student on Summary Template
- The Disability/ies documented on the student's IEP
- The IEP date(s) for the services provided in Related Documents
- Documentation of total General Purpose expenditures incurred by the LEA (for up to five services)
  - The Service types
  - The Service frequency
  - The Service time period
  - The Service expenditure

A drop down selection of service types can be chosen for what is the most appropriate expense type. ePlan auto-calculates the total student expenditure for each student after entry.

- Click the box if "The student was placed by a state agency (DCS, DHS, DMH, DOH) or attended a state special school (TSB, TSD, WTSD)."

For the supporting documentation template page that summarizes the general purpose direct expenditures, the LEA must use the appropriate provided tab (Type2 State Agency Placement) to help summarize their supporting financial documentation. A review will be done utilizing the IEP(s), Supporting Document Template Page, and Supporting Documentation in order to verify all requested reimbursements for expenditures. Failure to provide adequate documentation can result in denial or partial award of a LEA's qualifying reimbursement amount for the high-cost student.

**Note:** Do not submit more high-cost students than the maximum allowable for the LEA. If the LEA's maximum is two, the LEA may only submit at most two submissions regardless of type.

### **3<sup>rd</sup> Type of High-Cost Student: Extremely High-Cost Students Placed and Served By LEA**

Some students require extensive and costly special education and related services that create a severe financial burden on the LEA. Additional funds will be used to assist in the provision of such a high-cost program when the additional cost is greater than three (3) times the state's average per pupil expenditures. The percentage of reimbursement for the high cost for Priority 3 is determined based on the available money in the required high-cost discretionary pool and the total amount requested by all LEAs.

When applying LEAs will be allowed a maximum of 0.3% of the Dec. 1, 2022, census count for the total number of students served. LEAs with a December census count of less than 600 will be allowed to submit up to two (2) high-cost students for the IDEA High Cost.

The Dec. 1, 2022, census count for the LEA is pre-loaded to the page. The maximum number of allowable requests for the LEA is auto-calculated and pre-loaded to the page. If these numbers are incorrect, please contact [Brett.Printz@tn.gov](mailto:Brett.Printz@tn.gov) for assistance.

To qualify for a high-cost reimbursement, the General Purpose expenditures must be three (3) times the state average per-pupil expenditure of \$11,120.25 for FY 2022 or \$35,400.24 for the 2022-23 school year [Section 611(e)(3)(C)]. The State average per-pupil expenditure information is also located on the TN State Report Card.

The eligible high-cost reimbursement for a type 3 student is the Total Student Expenditure minus the LEA's per-pupil expenditure from General Purpose. For students counted on the Dec. 1, 2022, census, the per-pupil Federal funds expenditure is also deducted from the Total Student Expenditure. These deductions are calculated by the department and preloaded onto the page.

LEAs can request reimbursement for students in this priority by completing the appropriate grade span page (Pre-K or K-12) for each student. For each student, provide:

- State Student ID
- Student DOB
- School attended in 2023-24
- The Disability/ies documented on the student's IEP
- The IEP date for the services provided
- Whether the Student was reported on the Dec. 1, 2021, census
- Justification for Extremely High-Cost Services
- Documentation of total General Purpose expenditures incurred by the LEA (for up to five services)
  - The Service types
  - The Service frequency
  - The Service time period
  - The Service expenditure
- ePlan auto-calculates the total student expenditure for each student.
- Enter the General Purpose Funds per-pupil expenditure copied from above.
- If the student was counted in the Dec. 1, 2022, census, click the box in column of the submission page.
- Click the box whether "Was the student aged 3-5 on Dec. 1, 2023?" OR "Was the student aged 6-21 on Dec. 1, 2023?"

ePlan auto-calculates the sum of all student expenditures for the type 3 high-cost student and the sum after the deductions for general purpose per pupil and federal per pupil.

For the supporting documentation template page that summarizes the general purpose direct expenditures, the LEA must use the appropriate provided tab (Type3 Private Placement or Type 3 Other IDEA High Cost) to help summarize their supporting financial documentation. A review will be done utilizing the IEP(s), Supporting Document Template Page, and Supporting Documentation in order to verify all requested reimbursements for expenditures. Failure to provide adequate documentation can result in denial or partial award of a LEA's qualifying reimbursement amount for the high cost student.

**Note:** Do not submit more high-cost students than the maximum allowable for the LEA. If the LEA's maximum is two, the LEA may only submit at most two submissions regardless of type.

## Related Documents

The **Related Documents** pages allow users to upload external related documents. For each priority category where the LEA seeks reimbursement, the LEA must upload supporting documentation for each service for each student. *Include the IEP service page(s), with personal identifiable information (PII) redacted, as part of the documentation submitted.*

Related Documents		
Example County (777) Public District - FY 2024 - IDEA High Cost - Rev 0		
Go To <span style="float: right;">▶</span>		
Optional Documents		
Type	Document Template	Document/Link
(IDEA High Cost) IEP Documentation ⓘ	N/A	
(IDEA High Cost) Student Reimbursement Request Supporting Document Template ⓘ	<a href="#">Student Reimbursement Request Supporting Document Template</a>	
(IDEA High Cost) Supporting Documentation ⓘ	N/A	

A Student Reimbursement Request Supporting Document Template is provided on this page.

- Download this template to use the appropriate tab for each LEA student submission.

For each high-cost student, submit the following:

- One (1) pdf document for IEP Documentation to include all of the following, in this order:
  - IEP(s) cover page- personal identifiable information (PII) redacted and state student ID included
  - IEP(s) services pages- covering the entire school year; PII redacted and state student ID included on each page; if there are multiple IEPs, include them, in chronological order.
- One (1) document utilizing the IDEA Reimbursement Request Supporting Document Template provided:
  - One template per student must be provided with the summary of the general purpose direct expenditures found in the financial supporting documentation.
- One (1) pdf document for Supporting Documentation to include:
  - Financial supporting documentation with student PII redacted and state student ID included on each page.

Documents should be saved as

- **[Student's Initials][State Student ID number][School Year][IEP]**  
Example: "BP 1234567 2023-2024 IEP"
- **[Student's Initials][State Student ID number][School Year][SUMMARY]**  
Example: "BP 1234567 2023-2024 SUMMARY"
- **[Student's Initials][State Student ID number][School Year][SUPDOC]**  
Example : "BP 1234567 2023-2024 SUPDOC"

To upload Related Documents:

- Click the **Upload New** link to begin the upload.
- Click the **Choose File** button to browse for the document.

- **Upload** the document and enter a specific name for the document.

Click **Create** to upload the document.

## Assurances

Users must review all program assurances thoroughly. All items specified are requirements of the program, legislation, or regulation. By checking the assurance check box, the user affirms that they have read and understand all requirements and that the user assures the state education agency (SEA) that the user meets each of the conditions detailed in the Assurances.

**Assurances**

The Local Educational Agency (LEA) hereby assures the State Educational Agency (SEA) that:

1. The information provided in this request for additional funds is accurate, and each student's evaluation, eligibility, and Individualized Education Program (IEP) are current.
2. Only students with federally recognized disability categories have been included in this request.
3. State and local funds expended for the special education program will demonstrate maintenance of effort to qualify for any federal funds, including those for high-cost students.
4. Documentation is available in the LEA to support these expenditures from General Purpose funds.
5. All reimbursements will be budgeted and expended as General Purpose funds in the 71200 and/or 72220 series for audit purposes.

## Checklist

During the department's review of the IDEA High-Cost tool, the IDEA High-Cost Checklist is used to provide feedback to users and communicate corrections that must be made to the IDEA High-Cost tool before it can be approved.

After submission, the department reviews the IDEA High-Cost tool and marks each section as **OK**, **Not Applicable**, or **Attention Needed**. If the IDEA High-Cost tool contains no items that are marked as **Attention Needed**, the IDEA High-Cost tool is approvable.

Each section is designated with one of these statuses:

- **Not Reviewed:** No review occurred.
- **OK:** The section has no corrections and is approvable.
- **Coordinator Reviewed:** The section has been reviewed by the coordinator.
- **Attention Needed:** The section has items that need to have corrections completed.
- **N/A:** The section has no items that have to be reviewed.

Users should review the Checklist for comments from each High Cost reviewer, if applicable, and for the program section.

If the IDEA High-Cost tool contains items that are marked as **Attention Needed**, the IDEA High Cost tool will be returned to the user with a status of **Not Approved**. The user must review the checklist for items that are marked **Attention Needed** and make the necessary changes to those items. Only the checked items in the areas marked **Attention Needed** need correction. Each section marked **Attention Needed** includes notes to explain items needing attention. The user should check for notes and additional comments.



Status: **TDOE IDEA High Cost Consultant Returned**

Change Status To: [LEA IDEA High Cost Director Draft Completed](#)

[View Change Log](#)

[Delete this Data and Information Revision](#)

**Description** ( [View Sections Only](#) [View All Pages](#) )

All

- History Log
  - [History Log](#)
  - [Create Comment](#)

Once the user has made the necessary adjustments, the user resubmits the IDEA High-Cost tool for approval. If the department determines that the area is corrected, **Attention Needed** will be changed to **OK** by department leadership. If the items needing attention still have not been corrected, the IDEA High Cost tool will be returned with a status of **TDOE IDEA High-Cost Consultant Returned**.

If the IDEA High Cost tool contains no items that are marked **Attention Needed**, it can be approved. It may contain an amount that is lower as a result of being partially approved. This can be due to lack of supporting documentation and receiving partial credit for what was turned in to substantiate the requested amount.

## Validations

ePlan runs IDEA High-Cost tool validations as checks to help users complete the IDEA High-Cost tool correctly. Users can view validation messages from the [Sections](#) page, by clicking **Messages** in the Validation column. Users can view all validation messages in the IDEA High-Cost tool or validation messages for the individual page.

IDEA High Cost Sections	
Example County (777) Public District - FY 2024 - IDEA High Cost - Rev 0	
Status:	<b>Draft Started</b>
Change Status To:	<a href="#">LEA IDEA High Cost Director Draft Completed</a>
<a href="#">View Change Log</a>	
<a href="#">Delete this Data and Information Revision</a>	
Description ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )	Validation
All	<a href="#">Messages</a>
<input type="checkbox"/> History Log	
<a href="#">History Log</a>	
<a href="#">Create Comment</a>	
<input type="checkbox"/> IDEA High Cost	<a href="#">Messages</a>
<a href="#">Overview and Instructions</a>	<a href="#">Messages</a>
<a href="#">Cover Page</a>	<a href="#">Messages</a>
<a href="#">IDEA High Cost Reimbursement</a>	
<a href="#">Related Documents</a>	<a href="#">Messages</a>
<a href="#">Assurances</a>	<a href="#">Messages</a>

On the [Validation Messages](#) page, items marked **Warning** are validations that users are not required to address prior to submitting the IDEA High-Cost tool. Examples of warnings are not uploading an optional related document for each submission.

Validation Messages	
Example County (777) Public District - FY 2024 - IDEA High Cost - Rev 0	
<a href="#">Return To Sections Page</a>	
IDEA High Cost	
<b>Actions</b>	<b>Overview and Instructions</b>
<a href="#">Review</a>	Questions marked with an asterisk (*) require a response. <span style="float: right;">Error</span>
<b>Actions</b>	<b>Cover Page</b>
<a href="#">Review</a>	Questions marked with an asterisk (*) require a response. <span style="float: right;">Error</span>
<b>Actions</b>	<b>Related Documents</b>
<a href="#">Review</a>	The optional Related Document '(IDEA High Cost) IEP - Dates of Service Page' has not been uploaded. Please be certain this is the intention. <span style="float: right;">Warning</span>
<a href="#">Review</a>	The optional Related Document '(IDEA High Cost) Student Reimbursement Request Supporting Document Template' has not been uploaded. Please be certain this is the intention. <span style="float: right;">Warning</span>
<a href="#">Review</a>	The optional Related Document '(IDEA High Cost) Supporting Documentation' has not been uploaded. Please be certain this is the intention. <span style="float: right;">Warning</span>
<b>Actions</b>	<b>Assurances</b>
<a href="#">Review</a>	Questions marked with an asterisk (*) require a response. <span style="float: right;">Error</span>
<a href="#">Return To Sections Page</a>	

Items marked **Error** are incorrect, and users must address each one before submitting the IDEA High-Cost tool. Examples of errors are (1) not clicking an acknowledgement box for the threshold amount, (2) not providing contact details, (3) not inputting a submission, and (4) not attesting to the assurance page.

If the user does not address all **Error** validations, ePlan will not allow a user to submit the IDEA High Cost tool. Click on the **Review** link to go to the identified page to make corrections.

Validation Messages	
Example County (777) Public District - FY 2024 - IDEA High Cost - Rev 0	
<a href="#">Return To Sections Page</a>	
IDEA High Cost	
<b>Actions</b>	<b>Overview and Instructions</b>
<a href="#">Review</a>	Questions marked with an asterisk (*) require a response. <span style="float: right;">Error</span>
<b>Actions</b>	<b>Cover Page</b>

### Submission

When all IDEA High Cost tool sections and pages are complete and any validation errors are cleared, the IDEA High Cost tool is ready for submission and the approval process. Refer to the [ePlan User Access](#) section of this guide or the individual IDEA High-Cost tool guide for the approval workflow.

To submit the IDEA High Cost tool for review, the user changes the IDEA High-Cost tool status on the [Sections](#) page to **Draft Complete**. This generates an email to the next user in the approval workflow who must review the draft and click **Approved** (or **Not Approved**) at the top of the [Sections](#) page.

### How to Print in ePlan

Users may print or download a PDF from the [Sections](#) page.

- To print the entire IDEA High-Cost tool, click the **Print** link across from the word "All" at the top of the [Sections](#) page. **NOTE:** *Print requests do not include any uploaded related documents.*

Description (View System Only View All Pages)	Validation	Print Select Items
All	Messages	Print
History Log		Print
History Log		Print
Create Comment		Print
IDEA High Cost	Messages	Print
Overview and Instructions	Messages	Print
Cover Page	Messages	Print
IDEA High Cost Reimbursement	Messages	Print
Related Documents	Messages	Print
Assurances	Messages	Print
Checklist		Print
IDEA High Cost Checklist		Print
All	Messages	Print

- To print an entire section, click on the **Print** link to the far right of the section name. In the example shown, the user is printing the entire **High Cost** section.
- To print a single page, click on the **Print** link across from the name of the page.
- To choose multiple pages, check the **Print Select Items** box at the top of the print column to select more than one page. The **Print** links appear as checkboxes. Select all text boxes for the desired print request.
- Select the checkboxes and click **Print** at the top of the column.
- The **Print Request** screen pops up. Users may rename their print job here.
- Click **Print**.
- The **Generating Document** screen appears. The system takes 20–30 seconds to generate small print documents. For larger files, expect an email from the ePlan system when the file is ready to download.

The PDF generated by ePlan appears at the top of the page from the **TDOE Resources** menu item. The PDF link remains in **TDOE Resources** for five (5) days. Users may use the **Delete** links to remove any print jobs.

TDOE Resources			
Below is your list of Print Requests.			
Print Request Name	Request Date	Expiration Date	
My LEA Contacts Page	4/23/2020 2:28:48 PM	4/28/2020 2:28:48 PM	Delete

## Troubleshooting

The following are answers to common questions about ePlan application functionality.

### User Access

If an ePlan user is not able to work in the High Cost tool, it is usually due to one of these three reasons:

- The user is not using the **Google Chrome** browser. For best results: always use Google Chrome to access ePlan. ePlan does not have the same functionality in other browsers.
- The tool is not in the right work step or status. Users can only edit the IDEA High Cost tool when it is in **Draft Started** or **Revision Started** status.
- The user does not have the right role to work on the IDEA High Cost tool. When hovering the cursor over **Change Status To** options, a tooltip appears that indicates the roles with access to make the status change. This tooltip lists the names of individual users associated with each permitted role. Users can also access the address book to see which roles an ePlan user has.

The ePlan address book for each organization contains a list of every user that has an ePlan role.

- The LEA Role Contacts list all the roles. If the role is not listed in the address book, no one has been assigned to that role.
- The LEA Funding Application contacts are contacts selected for a funding application.
  - A contact is not the same as a role. A role assigns access to complete a task in ePlan.
- User Access forms are in ePlan's TDOE Resources in the User Access Form folder.
  - Users do not need an ePlan role to access TDOE Resources.

See [ePlan User Access](#) for more information about the ePlan status workflow and user roles.

## Validation Messages

- This feature shows any errors that will prevent an application from moving forward.
- Click the messages under **Validation** on the [Sections](#) page to see any errors or warnings.

Validation Messages		
Example County (777) Public District - FY 2024 - IDEA High Cost - Rev 0		
<a href="#">Return To Sections Page</a>		
IDEA High Cost		
<b>Actions</b>	<b>Overview and Instructions</b>	
<a href="#">Review</a>	Questions marked with an asterisk (*) require a response.	Error
<b>Actions</b>	<b>Cover Page</b>	
<a href="#">Review</a>	Questions marked with an asterisk (*) require a response.	Error
<b>Actions</b>	<b>Related Documents</b>	
<a href="#">Review</a>	The optional Related Document '(IDEA High Cost) IEP - Dates of Service Page' has not been uploaded. Please be certain this is the intention.	Warning
<a href="#">Review</a>	The optional Related Document '(IDEA High Cost) Student Reimbursement Request Supporting Document Template' has not been uploaded. Please be certain this is the intention.	Warning
<a href="#">Review</a>	The optional Related Document '(IDEA High Cost) Supporting Documentation' has not been uploaded. Please be certain this is the intention.	Warning
<b>Actions</b>	<b>Assurances</b>	
<a href="#">Review</a>	Questions marked with an asterisk (*) require a response.	Error
<a href="#">Return To Sections Page</a>		

## Post-Submission

When users need to revise the IDEA High-Cost tool after changing the status to **Draft Completed** prior to the submission deadline, contact the next approver in the workflow and ask that they change the status to **Not Approved** to return the application access to the previous user in the workflow. If the tool has proceeded through the workflow to the TDOE Program Director, users can contact the program director or ePlan Help to request that the tool be returned to the previous step in the workflow.

A complete list of ePlan program contacts is available [here](#).

## Inbox

Several ePlan functions automatically generate emails that the system sends to users. The [Change Log](#)

The [Change Log](#) may be accessed on the main sections page of the IDEA High-Cost tool. It lists every change or update since the previous status. This helps users identify changes that have been made to the IDEA High-Cost tool since they last viewed it. More information about the [Change Log](#) is available in the ePlan User Manual.

Sections
Public District - FY - Program - Rev 0
Application Status: Not Started
Change Status To: <a href="#">Draft Started</a>
<a href="#">View TDOE History Log</a>
<a href="#">View Change Log</a>
<b>Description</b> ( <a href="#">View Sections Only</a> <a href="#">View All Pages</a> )

History Log and Create Comment function prompts ePlan to send an email message to the selected recipients. **System Notifications** are sent to users because of a **Status Change** to support [IDEA](#) Directors who had existing roles in ePlan prior to July 2024 were grandfathered in with the new IDEA High-Cost role. Workflows.

ePlan Home	<b>ePlan Home</b>	
Search	▶	
Inbox	▶	Email Message Archive
Planning	▶	Items Awaiting Approval
Monitoring	▶	Associated Organizations
		Organization Number

All email messages sent or received by a user through ePlan can be accessed from the **Inbox**. The **Inbox** section of ePlan contains the **Email Message Archive** and **Items Awaiting Approval**. The **Email Message Archive** will contain all emails sent to or received from another ePlan user through the system. Users may select the time period to display. Messages received by the user will appear first; scroll down to the lower half of the page to view sent messages. Comments with email notifications can be accessed from the **Inbox** in addition to the **History Log** section of the IDEA High-Cost tool.

When a **System Notification** is generated related to a **Status Change** that requires the user to complete an approval step, users will find these in **Items Awaiting Approval**.