



---

**State of Vermont**  
**Vermont Department of Education**  
120 State Street  
Montpelier, VT 05620-2501

To: Superintendents  
Business Managers  
Special Education Administrators

From: Margaret C. Schelley  
Special Education Finance Manager

Date: August 17, 2011

Subject: FY-2012 Special Education Expenditure Report – Forms and Instructions & Technical Guide for Special Education Cost Documentation (August 2011)

Field Memo: 11-10

This package contains the forms and instructions for the FY-2012 Special Education Expenditure Report. The following materials are now available on the DOE Special Education Finance web page:

1. FY-2012 Special Education Expenditure Report forms;
2. Information Sheet which must be returned by September 16, 2011;
3. Instructions for FY-2012 Special Education Expenditure Reports; and
4. Technical Guide for Special Education Cost Documentation (August 2011).

#### *FY-2012 Special Education Expenditure Report Forms*

The FY-2012 Special Education Expenditure Report forms are unchanged from FY-2011 except there is one correction on Page 1. The line that was previously titled “Assessment Paid to S.U. or Union Schools” has been corrected to “Assessment Paid to S.U. or Joint Contract School”. The lines for the IDEA-B ARRA funding will remain for the current year as a number of supervisory unions will be spending the remainder of their FY-2010 ARRA funds.

#### *FY-2012 Information Sheets Due September 16, 2011*

The information sheet provides us with a list of the reporting entities for the new fiscal year, the contact person who can answer questions concerning the reports, and a contact person to answer questions concerning Worksheet A. The form this year requires the supervisory union to report the person responsible for special education staff documentation. This will allow us to contact the appropriate staff concerning trainings and other materials around special education staff documentation as it relates to the State special education funding formula.

The final section of the form requests information about the two staff members that should receive information on the payments based on the FY-2012 Special Education Expenditure Reports. The information will only be sent to these two individuals by the Department.



### *Instructions for FY-2012 Special Education Expenditure Reports*

The instructions for the FY-2012 Special Education Expenditure Reports are enclosed. This document includes the dates that the reports are due and instructions for completing the reports. The instructions for Worksheet A start on page 12 and the new State rates are shown in that section. The rates include a daily rate and an annual rate that is not to be exceeded for the school year. For questions relating to Worksheet A, you should contact Donna Trucksess at 828-5931. Questions about any other sections of the report should be directed to Dana Austin at 828-0769 or Margaret Schelley at 828-5119.

### *Technical Guide for Special Education Cost Documentation (August 2011)*

There is a new version of the Technical Guide. The most significant changes are to the staff documentation requirements for staff charged to federal grants. The changes were e-mailed to Special Education Directors and Business Managers at the beginning of the fiscal year and are now incorporated into the Technical Guide. The change is that the Periodic Time Certifications (sometimes called Semi-Annual Certifications) can only be used for staff members if 100% of their salary and benefits is charged to a single federal grant for performing work under a single cost objective under that grant. If the staff person is charged to two or more federal grants or charged to a federal grant and another source of funds, then that person must document their time through Personnel Activity Reports. Any staff person required to document their time through Personnel Activity Reports must complete the documentation for the entire time that any of their salary and benefits is being charged to federal funds.

### *Fall Special Education Finance Training*

The Department will be offering a training session on Special Education Finance. There are two sessions of the same session offered:

September 23 <sup>rd</sup>	Hampton Inn in Colchester
September 28 <sup>th</sup>	Holiday Inn in Rutland

The training is designed for Special Education Directors and Business Managers. We will be sending out information on registration at the end of the month.

### *Documents Available on Department of Education Web Site*

Please note that all of the documents are available on the Department of Education web site under Special Education Finance. At the bottom of the page there are links to pages relating to IDEA-B and Medicaid.