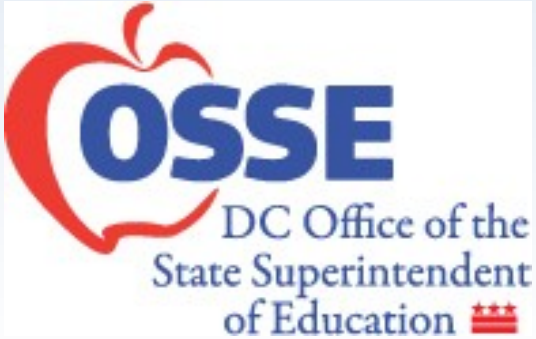
Overview of IDEA Part B Phase II Application

OSSE Training Session with LEAs

September 3, 2009



Welcome and Introductions

- Facilitator Introductions:
  - Charity Hallman, Financial Policy Manager, OSSE
- DSE Finance Team
  - Kieran Bowen, Grant Program Analyst
  - Ethan Lin, Financial Program Analyst
- Poll

IDEA Phase-II Application

- The IDEA Phase II Application will serve as your application for all of the below grants:
  - IDEA Part B Section 611 Annual
  - IDEA Part B Section 619 Annual
  - IDEA Part B Section 611 ARRA
  - IDEA Part B Section 619 ARRA

- The Phase II Application consists of two documents - a Word file and an Excel file.
  - Word file - contains the Programmatic questions
  - Excel file – contains the Fiscal workbook

  (An Instructions Manual will accompany the Application)

Submission Guidelines and Dates

Both segments of the Application have to be submitted (together), by no later than **October 16, 2009**

Applications must submit electronically to the DSE:

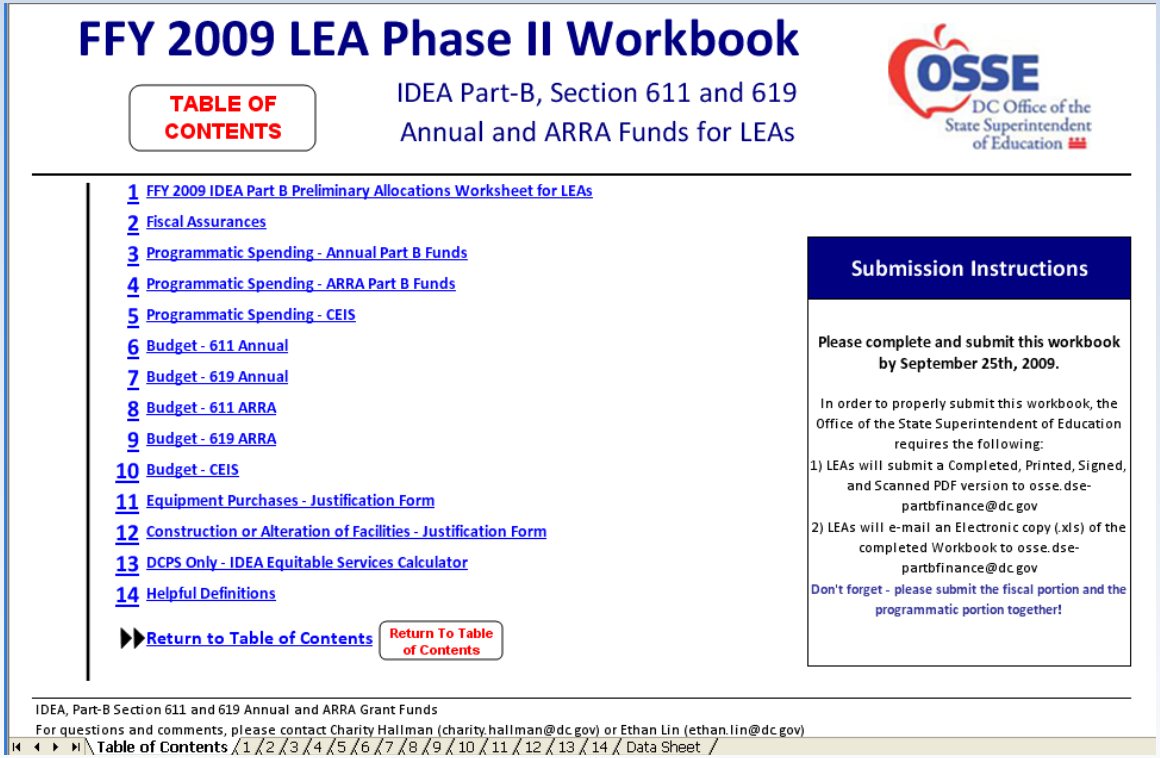
- A completed, printed, signed, and scanned .pdf (Portable Document Format) version
- An electronic version (.xls file) of the Fiscal Workbook
- All emails to: osse.dse-partbfinance@dc.gov

Application Process & Amendments

- Once submitted to the osse.dse-partbfinance@dc.gov email, the application is verified and must go through an approval process.
- If an LEA finds that they need to amend their spending and budget plan during the year, this is allowable under certain circumstances.
- In that case, the LEA would have to submit in a revised spending and budget plan with an explanation of why a change is necessary.
- Once approved, the revised spending and budget plan will be used to approve any future expenditure requests submitted after this point.

Navigating the Fiscal Workbook

- The navigation center of the workbook is the "Table Of Contents" tab:



FFY 2009 LEA Phase II Workbook

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IDEA Part-B, Section 611 and 619
Annual and ARRA Funds for LEAs

OSSE DC Office of the State Superintendent of Education

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Submission Instructions

Please complete and submit this workbook by September 25th, 2009.

In order to properly submit this workbook, the Office of the State Superintendent of Education requires the following:
1) LEAs will submit a Completed, Printed, Signed, and Scanned PDF version to osse.dse-partbfinance@dc.gov
2) LEAs will e-mail an Electronic copy (.xls) of the completed Workbook to osse.dse-partbfinance@dc.gov
Don't forget - please submit the fiscal portion and the programmatic portion together!

IDEA, Part-B Section 611 and 619 Annual and ARRA Grant Funds
For questions and comments, please contact Charity Hallman (charity.hallman@dc.gov) or Ethan Lin (ethan.lin@dc.gov)

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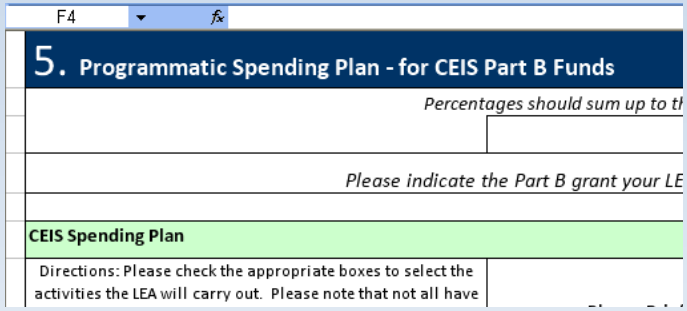
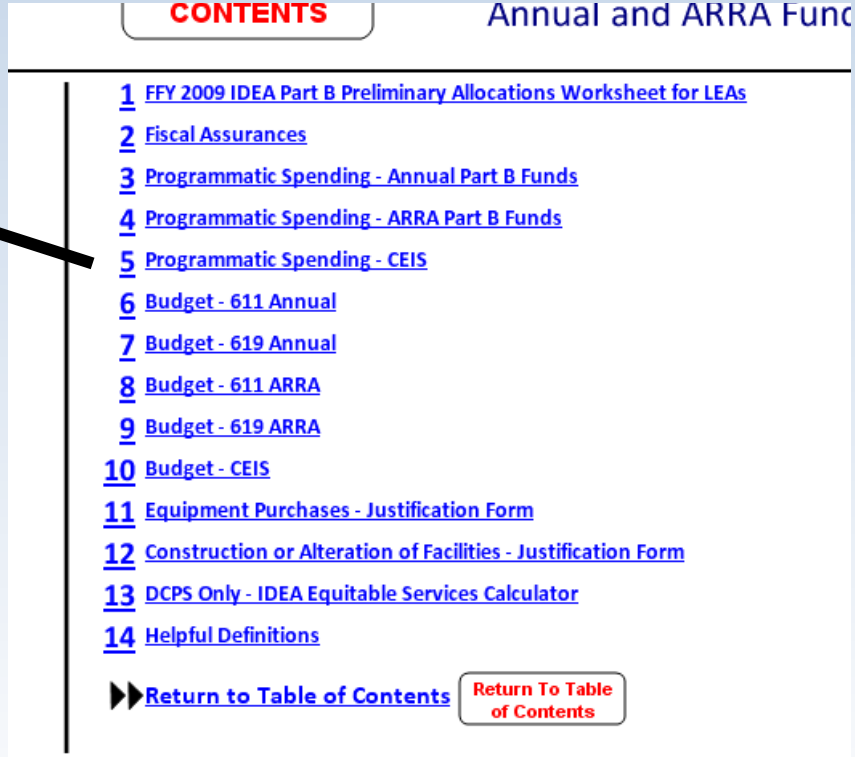
Navigating the Workbook

- Clicking on each link in the Table of Contents will take you to the relevant tab:

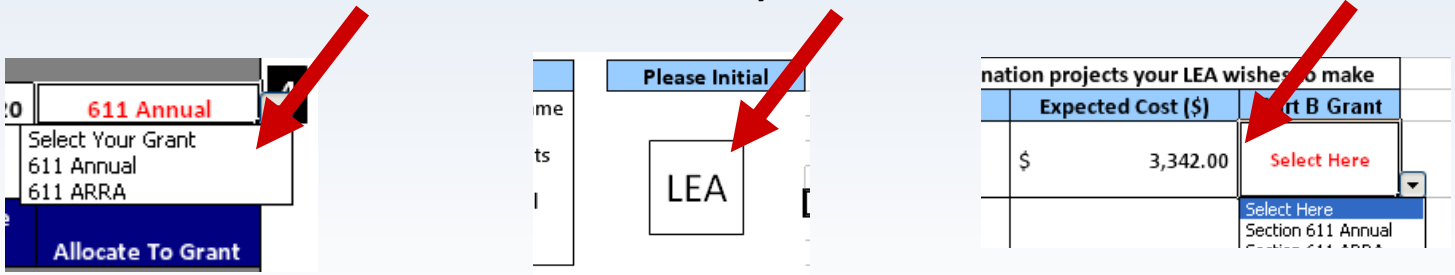




Navigating the Workbook

- You may return to the Table of contents at any time by using the "Return" button located in each tab:

- Each worksheet has workable fields that LEA can manipulate, including drop-down menus and text/number fields:



Don't forget…

- To spell check your application and your math!
- To sign an initial where appropriate
- Incomplete Applications will not be reviewed – this includes signatures.
- To make a copy for your records
- To submit a PDF copy and an electronic version of the entire Application
- The fiscal and programmatic portions of this Phase II application must be submitted together and to the osse.dse-partbfinance@dc.gov account.