|  |  |  |
| --- | --- | --- |
| Person Responsible |  |  |
| Case Manager | 1. Would the item be purchased for a general education student?
 | Yes No |
| Case Manager | 1. Would the service be delivered to general education students?
 | Yes No |
| Case Manager | 1. Do general education students receive the same services and use the same sort of equipment?
 | Yes No |
|  | If you answered “yes” to questions 1 through 3, it is not an appropriate use of special education funds. |  |
|  | If you answered “no”, continue to question 4. |  |
| Case Manager | 1. Is this expenditure eligible for MA reimbursement?

MA – contact Third Party Billing Coordinator at (check on email for MA) | Yes No |
| Case Manager | 1. What was the need that initiated the request and how was it determined that the cost was allowable, necessary, and reasonable?
 | Yes No |
| Case Manager | 1. Does the student or program need the item to access general education curriculum? Explain.
 | Yes No |
| Case Manager | 1. Is the purchase consistent with the needs of the student or program? Do you have a measurable goal? (data driven, targeting areas or weakness)
 | Yes No |
| Case Manager | 1. Do the staff have the capacity to use the purchased good?
 | Yes No |
| Case Manager | 1. What training, if any, is necessary? Provide costs.
 |  |
| Case Manager | 1. Does the student or program need the item or is there surplus already available?
 | Yes No |
| Case Manager | 1. Is the item or service to be purchased identified on the IEP(s)?

 Document here: | Yes No |
| Case Manager | 1. Is this expenditure eligible for MA reimbursement?

MA – contact Third Party Billing Coordinator at (check on email for MA) | Yes No |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_Case Manager Signature Date |  |
| Principal | Consult with the Business Office to determine if the expenditure is consistent with federal cost principles and the Uniform Grant Guidance (UGG)?  |  |
| Principal signs and forwards to the Assistant Director. | \*I understand the student or program need to purchase the item or service.\*I understand that this expenditure supports the students, supplements the program, and does not supplant funds.\*I understand this expenditure may require additional staff training.\_\_\_Yes, I understand and support.\_\_\_No, I understand, but do not support\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_Principal Signature Date |  |
|  |  |  |
| Business Manager signs and forwards to the Superintendent. | We will follow the state approved procurement procedures. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_Business Manager Signature Date |  |
| Superintendent signs. | I support this expenditure and will allocate general education funds if special education funds are not appropriate.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_Superintendent Signature Date |  |

|  |  |  |
| --- | --- | --- |
| Business Manager | 1. Describe the procurement process used:
 |  |
| Business Manager | 1. Does the purchase order, invoice, packing slip document the special education need? (responsible person or location, signature of the case manager and date)
 |  |