# Directions for Fund Code 262 - Filling out the *Required Record-Keeping and Proportionate Share Calculation form for Parentally-Placed Children With Disabilities Enrolled by Their Parents in Private Schools 34 CFR §§300.130-300.144* (the Proportionate Share Calculation Form)

**DESE requires districts to submit a proportionate share calculation and expenditure form annually with the IDEA Grant Application for Fund Code 262. (Directions for filing out the form for Fund Code 240 Application are separate and can be found on this page:** [**http://www.doe.mass.edu/sped/proshare/**](http://www.doe.mass.edu/sped/proshare/) **)**

# Opening the File, Enabling Macros and Saving the SmartForm:

1. Please download and save the [FY19 form](http://www.doe.mass.edu/sped/proshare/) to your computer.
2. Open the file. A dialog box may appear as the file opens prompting you to disable or enable macros and/or data connections. In order to use the workbook you must ‘Enable Macros and Active X’ and/or ‘Enable Data Connection’. Please set your security level to “Low,” then you will reset it once you have completed working with this file. *For additional assistance please contact your local district IT support personnel.*
3. Once the file is open, select ‘Save As’ and indicate where you want to save the file on your computer. Name the file **Proshare\_FY19\_LEAcode\_262.xlsx**.

The Smart Form is an Excel file, designed with 5 tabs representing the following 5 sections:

* Part I General Information,
* Part II Data,
* Part III Calculation,
* Part IV Consultation, and
* Part V Expenditures.

Each tab of the file is represented in the headings below. The Excel file is already formatted for you with prefilled formulas to calculate properly. **You will need to enter the data in the required cells for the whole form to calculate properly.**

# PART I: General

1. Click on the first tab, “PART I: General”. (Note: you will not see the other tabs until you have successfully completed the Part I General tab and hit the “Submit” button.)
2. Please fill Date Submitted (mm-dd-yy).
3. Do not try to enter your District LEA code, rather, select your district form the drop down menu next to “School District Name”. Your District LEA code, School District Name, and School District Address will auto populate.
4. Fill in the **name of the person** to contact regarding this report (including name, title, phone number, and email).
5. Then, please answer #1 by selecting the appropriate response.
6. Next steps:

* If you selected **A or B** please save and submit your form. Your district has no additional requirements for proportionate share activities.
* If you checked **C and/or D**, please fill out all of tabs, Parts II, III, IV and V.
* If you checked NO to **both** **E and F**, please fill out the tab **Data**, Part II, (section 2) Annual Data Collection, column C only.

1. Please fill out the assurance statement before you proceed.
2. Click the blue SUBMIT button. (You will now see more tabs of the workbook.)
3. Save before you move on.

# PART II: Data (sections 1 and 2)

1. Click on the 2nd tab, “PART II: Data”. Fill in the data fields with whole numbers only. You will be filling out the information for resident and non-resident students. Resident students are students who live in your district. Non-resident students do not live in your district, but attend school in your district.

# Part II Data: (Section 1) Annual count of the number of parentally-placed private school children with disabilities (34 CFR § 300.133(c))

1. Fill in Section 1 – You will fill in the information for Child Count, on line 1 including boxes A., B., and C.
   1. Line 1 is the # of all currently eligible parentally-placed private school students ages 3-5 attending an elementary school or home schooled in your district. \*Includes all students found eligible, regardless of whether they receive(d) special education services.
2. Line 2 will calculate automatically for you (the sum of A plus B plus C from line 1).
3. Enter Line 3, which is # of public school district students with IEPs (SWIEPs) ages 3-5.(SWIEPs for your public school district for the 2017-2018 school year. People often use their SIMS number here.)

## Section 1 notes:

1. For any item, if the answer is 0 (zero), you must type in the 0 for the rest of the form to calculate properly.
2. You will notice Block A refers to eligible private school students who live in and attend school in your district , Item B refers to eligible home schooled students who live in your district, while Item C refers to eligible students who do not live in your district but attend school in your district.
3. IMPORTANT NOTE FOR LINE 1: You are counting **all eligible** private school students attending private school in your district and eligible home school students whether they receive services from you or not. If they have been found eligible, remember they are eligible for 3 years. For example, if I am completing the calculation for FY19, I will be count back 3 years of eligibility since once a child is found eligible they remain so for 3 years.

# Part II Data: (Section 2) Record Keeping (34 CFR § 300.132(c))

### 

1. Depending on the answers to Part I General, see a. and b. below:
2. If on tab “Part I General” you checked D and/or E, please fill out all of Parts II, III, IV and V, please fill out Lines 1, 2, 3, and Items A, B, C, and D. Then, save and proceed to Part III Calculation.
3. Line 1: Total # of parentally-placed private school students ages 3-5 **evaluated** by your district during 2017-2018 school year (34 CFR § 300.132(c)(1))
4. Line 2: Total # of parentally-placed private school students ages 3-5 **found** **eligible** during the school year 2017-2018 (may include evaluations you conducted, or, for non-residents, evaluations provided by the district of residence and accepted as evidence of eligibility.) (34 CFR § 300.132(c)(2))
5. Total # eligible parentally-placed private school students ages 3-5 **served** by your district in the during the school year 2017-2018 (34 CFR § 300.132(c)(3))

1. If on tab “Part 1 General” you checked NO to **both E and F**, you do not have any private schools **and** “NO”, you do not have any home schooled students in your district; please fill in Lines, 1, 2, 3 for **Item C only**. Then, save your form and upload to your grant application.

# PART III: Calculating Proportionate Amount (34 CFR § 300.133)

1. Please click on the 3rd tab, “PART III: Calculation”.
2. If you filled in all the data, including zeros on “Part II Data”, lines A, B, C, D, and E will have data prefilled and auto calculated for you. You need to verify Line D is correct. That is your IDEA (grant fund code 262) allocation. You can edit this amount if for some reason your entitlement is different than what is listed.
3. *Line E of this chart is calculation of the minimum proportionate share of federal funds that the district is required to spend on services to eligible students ages 3-5 who attend private schools and/or home-schools located in your district in the next fiscal year.*
4. Save before you move on.

# PART IV: Consultation (34 CFR § 300.134)

1. Click on the 4th tab, “PART IV: Consultation”.
2. Please fill in the narrative information for numbers 1, 2, and 3:
3. Previous date(s) or planned upcoming dates of timely and meaningful consultation with private school representatives and representatives of parents of parentally-placed private school children with disabilities inclusive of home school representatives.
4. List private school representatives and representatives of parents of parentally-placed private school children with disabilities inclusive of home school representatives participating in timely and meaningful consultation meetings.
5. Consultation (34 CFR §300.134) must include a discussion of “child find” (34 CFR §300.134 (a)); the determination of proportionate share of funds (34 CFR §300.134 (b)); a discussion of consultation process (34 CFR §300.134 (c)), the provision of special education and related services (a discussion of possible services and how such services will be decided and delivered) (34 CFR §§300.134 (d)); whether directly or through a contract. Following consultation, this space should briefly **explain what services were decided upon and how such services will be provided.**
6. Item 4: *Assurance: For each timely and meaningful consultation during the year, our district will obtain signed written affirmations. Copies will be kept at the district for review by the DESE Public School Monitoring team. (34 CFR §300.135(a)) \*If the private school representatives/parents do not provide the signed written affirmation within a reasonable period of time, the LEA must forward the documentation of the consultation process to DESE. Email documentation to ideaequitableservices@doe.mass.edu. . (34 CFR §300.135(b))*. There is a check box for the district to select to acknowledge and agree with the assurance.
7. Save before you move on.

# PART V: Budget Expenditures (34 CFR §300.133)

### Planned expenditures for FY19 to meet the calculated proportionate share amount for parentally-placed private school and home school children ages 3-21 attending school in your district.

1. Please click on the 5th tab, “PART V: Expenditures”.
2. Please fill in the budget for how you plan to spend the proportionate share funds over FY19. Please use whole numbers only. Your line item amounts should not exceed the amount indicated in your 262 Grant application line items. Your total budget on this page will need to at least meet your minimum proportionate share obligation. (refer to Part III Calculation)
   1. Notes on expenditures:
      * Do not list your entire 262 budget, only include expenses directly related to meeting your proportionate share obligation from your federal IDEA funds.
      * **Child find activities and evaluation activities cannot be included and do not count towards meeting your proportionate share. 300.131(d)**
3. Line 11 is your total planned proportionate share expenditure for FY19. This box will be GREEN if you at least meet your minimum obligation.
4. Save the form.
5. If you would like a hardcopy, go to “Print” for each of the tabs.
6. Upload the FY19 form to your 262 grant application.
7. Be sure to retain the digital copy of this form for easy reference.