

How to Complete the MOE Eligibility Budget Form Training Video Transcript

For ISD Business Officials

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This training video explains how to complete the MOE Eligibility Test activity in Catamaran for ISD business officials. In advance of each school year, ISDs must complete this activity to demonstrate a plan for maintaining special education fiscal effort.

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This video covers the following topics: accessing the activity, completing the MOE Eligibility Budget Form, reviewing member district submissions, reviewing and submitting test results, entering exceptions, what to expect after completing the activity, and additional resources.

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Accessing the activity. ISD business officials will receive an email notification when the activity is available. To begin, log in to Catamaran (<https://catamaran.partners>) and open the activity from the tasks overview [Select the Activity - MOE Eligibility Test on the Tasks Overview located toward the middle bottom of the screen]. If you don't see it, try clearing the filter [Mouse up to above the Tasks Overview and Select Clear on the right side of the screen].

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Completing the MOE Eligibility Budget Form. After opening the activity, locate and select the MOE Eligibility Budget Form on the activity menu [Select the MOE Eligibility Budget Form link on the middle left of the screen]. The MOE Eligibility Budget Form asks ISD business officials to estimate amounts that will be submitted on the SE-4096 and SE-4094 cost reports for the upcoming school year. ISDs must enter budget estimates for their own SE-4096 and SE-4094 expenditures in the same way member districts do. These estimates are the basis for calculating fiscal effort for MOE. Complete the form using the fields provided, referencing the most recently submitted SE-4096 and SE-4094 where appropriate [Complete Fields A, B, C, and D on the left of the screen]. The amounts will automatically calculate as fields are completed [the Calculated Anticipated 2022-23 SE-4096 Amount field is located on the bottom-left of the screen]. The amounts for the comparison year are provided as an additional reference point. Amounts saved on this form will automatically be incorporated into the MOE Eligibility test results [the amount is located on the bottom-right of the screen].

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Reviewing member district submissions. ISD business officials must also review the MOE Eligibility Budget Forms submitted by their member districts. They will receive an email notification when a submission is ready for review. Submissions can be accessed from the Tasks Overview [select the Activity - MOE Eligibility Budget Form on the Tasks Overview located toward the middle bottom of the screen]. Review the submission and select one of the following actions. [The following option buttons are located at the top-right of the MOE Eligibility Budget Form page] Return for Modifications returns the form to the member district, comments are required. Accept Submission includes the submission in the MOE Eligibility Test Results. Exclude from the MOE Eligibility Test excludes the member district data from the MOE Eligibility Test results. Comments are required. ISD business officials may opt to exclude certain member districts from the MOE Eligibility Test, if special education expenses are not expected in those districts or if the ISD is able to meet the MOE Eligibility requirement using estimates from other member districts.

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Reviewing and submitting test results. Access the MOE Eligibility Test Results from the activity menu [the MOE Eligibility Test Results link is located on the bottom-right of the screen]. This page displays the test results for the aggregate ISD MOE Eligibility Test. First, it aggregates the SE-4096 and SE-4094 amounts from across the ISD to calculate anticipated fiscal effort at the ISD level [the amount in the middle table on the screen]. Then, it compares these amounts to the thresholds established in the most recent MOE Compliance Test [located in the top row of the bottom table on the screen]. At least one threshold must be met to meet the MOE Eligibility requirement. The calculations on this page are updated automatically as ISD business officials complete the MOE Eligibility Budget Form and accept budget form submissions from their member districts [the final row in bottom table on the screen displays these calculations]. Once all member district MOE Eligibility Budget Forms have been accepted or excluded, and the test results demonstrate that the ISD has met the requirement using at least one method, an ISD business official may then submit the test results to the MDE using the submit button [the submit button is located at the top-right of the screen]. If the ISD has not met at least one threshold, and all member districts have finished their work, the ISD business official must enter exceptions.

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Entering exceptions. Exceptions can be entered for either the test year or the intervening year. Access the exceptions forms from the activity menu [the links to the exceptions forms are located under the Exceptions header on the middle-right of the screen]. Using the exceptions form, enter eligible exceptions for the appropriate year, in accordance with CFR Section 300.204 [located under the first drop-down menu on the middle of the screen]. All entered exceptions and adjustments will be totaled and immediately applied to the MOE Eligibility Test Results [the total amount on the bottom-right of the screen]. Review the test results again to determine if enough exceptions have been entered to meet the requirement using at least one method.

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What to expect after completing the activity. After submitting the test results, the MDE will review the results, including any exceptions used. If the MDE determines modifications are required, an MDE Official will include comments at the bottom of the MOE Eligibility Test Results page. ISD business officials will receive an email notification when the review is complete. Once the submission has been accepted by the MDE, no further action is required of the ISD. For additional help, contact the Catamaran Help Desk. The help desk can be reached toll-free at 877-474-9023, or by emailing [help@catamaran.partners](mailto:%20help@catamaran.partners). Additional resources can be found on the Catamaran Technical Assistance Website, located at <https://training.catamaran.partners>.