Instructions for migrating data to CIFR LEA MOE Calculator version 1.3

Instructions apply to versions 1.0, 1.1, and 1.2

January 10, 2019

Version 1.3 of the Local Educational (LEA) Agency Maintenance of Effort (MOE) Calculator corrects errors discovered in December 2018 and makes other improvements for ease of use.

***** Important: You must upgrade to version 1.3 of the Calculator to ensure correct calculations for 2017–2018 and beyond. *****

CIFR recently discovered programming errors in the LEA MOE Calculator that affect calculations starting with the 2017–2018 fiscal year. To address these errors, CIFR created a new version of the Calculator (v1.3) with corrections to the 17-18, 18-19, and 19-20 MOE tabs and the 18-19 Exc & Adj tab. Although the corrections do not affect data entered for 2016–17 and earlier years, users will need to stop using earlier versions of the Calculator for years beyond 2016–17. **Continuing to use earlier versions of the Calculator when entering data for 2017–18 or later could result in an incorrect MOE result.**

CIFR staff are available to assist with these instructions and are also available to directly assist in migrating your data to the revised version, as needed. Contact cifr_info@wested.org or your CIFR TA provider for assistance.

For each tab in the Calculator, you can copy your data from the old version to the new version using these instructions. In general, you will copy data from shaded cells in the original file and "paste values" into shaded cells in the new version. You cannot copy from or paste into unshaded cells. For users who benefit from visual guidance, the rest of this document provides step-by-step instructions with screenshots for each type of tab.

Assuming you have entered historical data and data through 2017–18 Compliance (including 2018–19 Eligibility), we estimate that it will take about half an hour per LEA to copy data, depending on the amount of data (especially exceptions and adjustments) entered. Please see the checklist at the end of this document for a complete list of tabs that may need to be updated.

Tab by Tab Instructions:

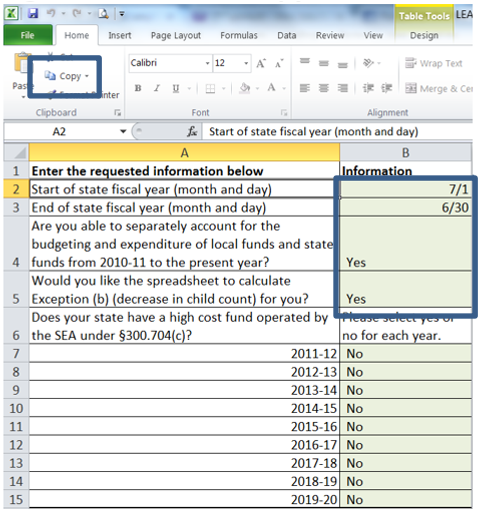
Tab 3. Getting Started

If you are still using v1.0 or v1.1: The Getting Started Tab of Version 1.3 of the Calculator contains two new rows (rows 2 and 3) where you can enter the LEA name and ID if desired. Once the LEA name and ID rows are populated, copy or re-enter data from cells B2-B5 in v1.0/v1.1 to cells B4-B7 in v1.3. Note: this is the only tab in the Calculator where you will copy and paste to different cell numbers.

1. To copy data, you can either select the "Copy" button on your menu bar/ribbon in Excel or you can use Ctrl+C. To paste data, you can either select the "Paste" button on your menu bar/ribbon in Excel or you can use Ctrl+V.

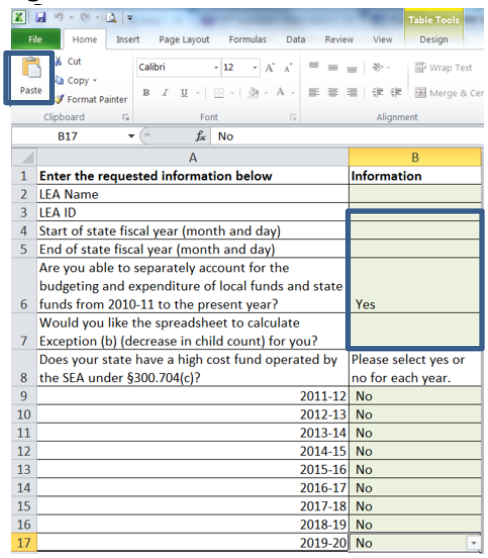
Note: Do NOT use "Cut" or Ctrl+X to move data. Using "Cut" or Ctrl+X will result in errors and will prevent auto-calculation.

Figure 1. v.1.0/v1.1: Copy these cells



	A	B
1	Enter the requested information below	Information
2	Start of state fiscal year (month and day)	7/1
3	End of state fiscal year (month and day)	6/30
4	Are you able to separately account for the budgeting and expenditure of local funds and state funds from 2010-11 to the present year?	Yes
5	Would you like the spreadsheet to calculate Exception (b) (decrease in child count) for you?	Yes
6	Does your state have a high cost fund operated by the SEA under §300.704(c)?	Please select yes or no for each year.
7	2011-12	No
8	2012-13	No
9	2013-14	No
10	2014-15	No
11	2015-16	No
12	2016-17	No
13	2017-18	No
14	2018-19	No
15	2019-20	No

Figure 2. v.1.3: Paste into these cells



	A	B
1	Enter the requested information below	Information
2	LEA Name	
3	LEA ID	
4	Start of state fiscal year (month and day)	
5	End of state fiscal year (month and day)	
6	Are you able to separately account for the budgeting and expenditure of local funds and state funds from 2010-11 to the present year?	Yes
7	Would you like the spreadsheet to calculate Exception (b) (decrease in child count) for you?	
8	Does your state have a high cost fund operated by the SEA under §300.704(c)?	Please select yes or no for each year.
9	2011-12	No
10	2012-13	No
11	2013-14	No
12	2014-15	No
13	2015-16	No
14	2016-17	No
15	2017-18	No
16	2018-19	No
17	2019-20	No

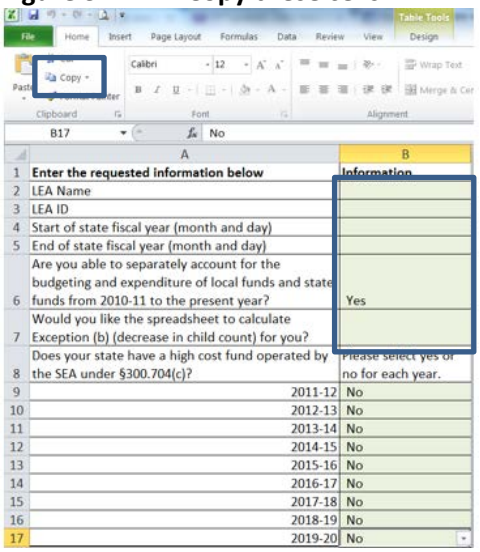
Also, be sure to select "Yes" in cells B9-B17 for any years when your SEA operated a high cost fund under §300.704(c).

If you are using v1.2: Copy data from cells B2–B7 to cells B2–B7 in v1.3.

To copy data, you can either select the "Copy" button on your menu bar/ribbon in Excel or you can use Ctrl+C. To paste data, you can either select the "Paste" button on your menu bar/ribbon in Excel or you can use Ctrl+V.

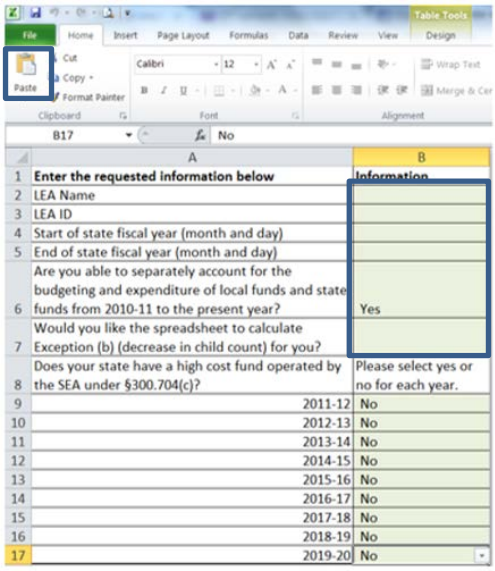
Note: Do NOT use "Cut" or Ctrl+X to move data. Using "Cut" or Ctrl+X will result in errors and will prevent auto-calculation.

Figure 3. v.1.2: Copy these cells



	A	B
1	Enter the requested information below	Information
2	LEA Name	
3	LEA ID	
4	Start of state fiscal year (month and day)	
5	End of state fiscal year (month and day)	
6	Are you able to separately account for the budgeting and expenditure of local funds and state funds from 2010-11 to the present year?	Yes
7	Would you like the spreadsheet to calculate Exception (b) (decrease in child count) for you?	
8	Does your state have a high cost fund operated by the SEA under §300.704(c)?	Please select yes or no for each year.
9	2011-12	No
10	2012-13	No
11	2013-14	No
12	2014-15	No
13	2015-16	No
14	2016-17	No
15	2017-18	No
16	2018-19	No
17	2019-20	No

Figure 4. v.1.3: Paste into these cells



	A	B
1	Enter the requested information below	Information
2	LEA Name	
3	LEA ID	
4	Start of state fiscal year (month and day)	
5	End of state fiscal year (month and day)	
6	Are you able to separately account for the budgeting and expenditure of local funds and state funds from 2010-11 to the present year?	Yes
7	Would you like the spreadsheet to calculate Exception (b) (decrease in child count) for you?	
8	Does your state have a high cost fund operated by the SEA under §300.704(c)?	Please select yes or no for each year.
9	2011-12	No
10	2012-13	No
11	2013-14	No
12	2014-15	No
13	2015-16	No
14	2016-17	No
15	2017-18	No
16	2018-19	No
17	2019-20	No

Also, be sure to select "Yes" in cells B9-B17 for any years when your SEA operated a high cost fund under §300.704(c).

Tab 4. Multi-Year MOE Summary

Because of protected formulas, you will have to copy and paste data from this sheet in sections. Start with Cells C3-G7. Next, copy the MOE results in cells I3-I7 and then the MOE results in cells K3-K7. Excel will not allow you to copy and paste the entire C3-K7 block because of protected formulas in columns H and J. **Paste into the same cells in v.1.3 of the Calculator.** Please note that rows 8 and up for years 2015–16 and later will be auto-calculated.

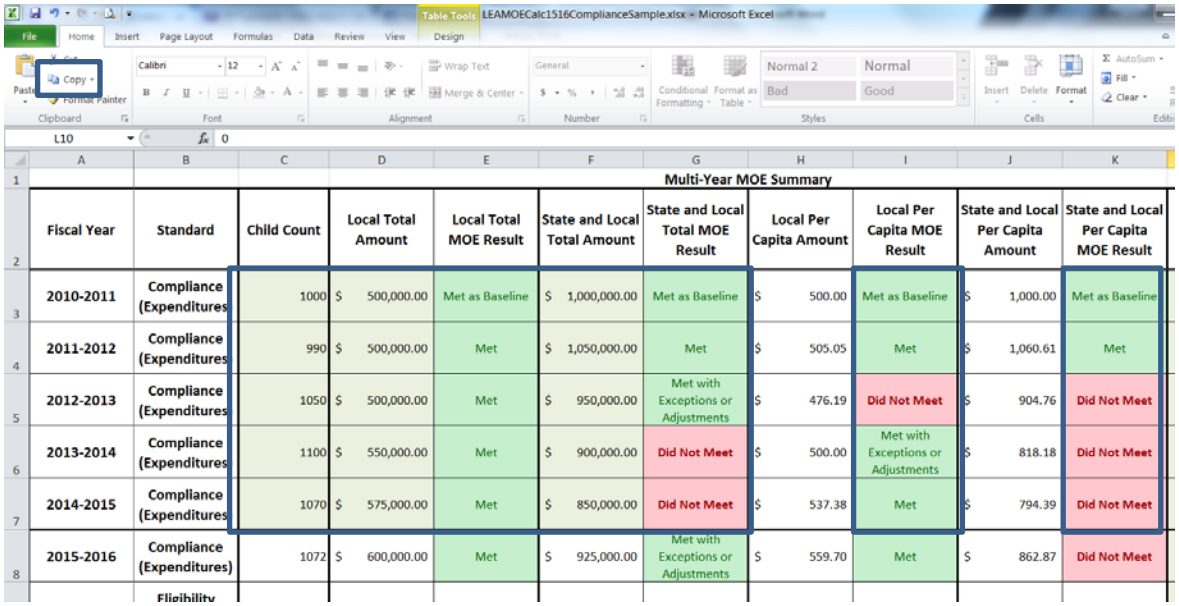
It is recommended that you paste values to avoid copying embedded formatting elements from the old version of the Calculator.

1. To copy data, you can either select the "Copy" button on your menu bar/ribbon in Excel or you can use Ctrl+C.
2. To paste values, you can use one of the following methods:
    a. Select the "Paste" button on your menu bar/ribbon in Excel or use Ctrl+V. After pasting, click on the clipboard icon that appears in the bottom right of the pasted text and select the far left option under "Paste Values."
    b. Go to the Home tab on your ribbon, click on the arrow under "Paste" and select the far left option under "Paste Values."
    c. Right click in the first destination cell and select the second option from the left under "Paste Options" for "Paste Values."

The "Paste Values" icon is a clipboard with "123" at the bottom:

Note: Do NOT use "Cut" or Ctrl+X to move data. Using "Cut" or Ctrl+X will result in errors and will prevent auto-calculation.

Figure 5. Tab 4 v.1.0/v1.1/v1.2/v1.3



Multi-Year MOE Summary

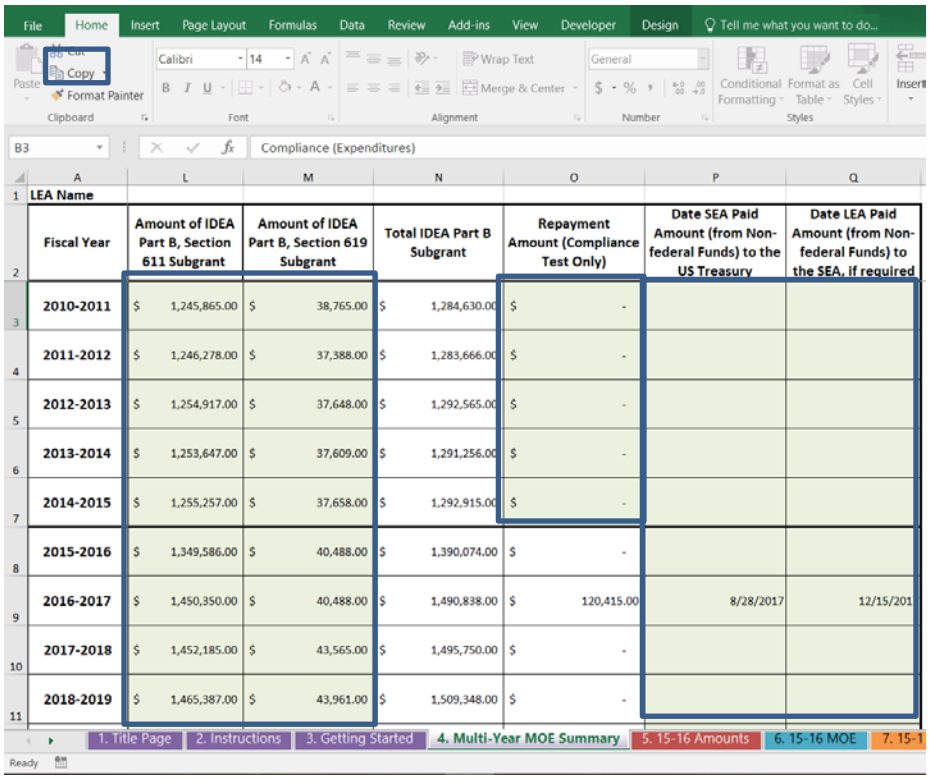
Fiscal Year	Standard	Child Count	Local Total Amount	Local Total MOE Result	State and Local Total Amount	State and Local Total MOE Result	Local Per Capita Amount	Local Per Capita MOE Result	State and Local Per Capita Amount	State and Local Per Capita MOE Result
2010-2011	Compliance (Expenditures	1000	$ 500,000.00	Met as Baseline	$ 1,000,000.00	Met as Baseline	$ 500.00	Met as Baseline	$ 1,000.00	Met as Baseline
2011-2012	Compliance (Expenditures	990	$ 500,000.00	Met	$ 1,050,000.00	Met	$ 505.05	Met	$ 1,060.61	Met
2012-2013	Compliance (Expenditures	1050	$ 500,000.00	Met	$ 950,000.00	Met with Exceptions or Adjustments	$ 476.19	Did Not Meet	$ 904.76	Did Not Meet
2013-2014	Compliance (Expenditures	1100	$ 550,000.00	Met	$ 900,000.00	Did Not Meet	$ 500.00	Met with Exceptions or Adjustments	$ 818.18	Did Not Meet
2014-2015	Compliance (Expenditures	1070	$ 575,000.00	Met	$ 850,000.00	Did Not Meet	$ 537.38	Met	$ 794.39	Did Not Meet
2015-2016	Compliance (Expenditures)	1072	$ 600,000.00	Met	$ 925,000.00	Met with Exceptions or Adjustments	$ 559.70	Met	$ 862.87	Did Not Meet
	Eligibility									

Tab 4. Multi-Year MOE Summary (Continued)

Scroll to the right and copy any data you entered for 2010–11 through 2018–19 (or later, if you entered projected data). Start with cells L3-M11 and then copy O3-O7 and finish with P3-Q11. Paste into the same cells in v.1.3 of the Calculator.

Note: Do NOT use "Cut" or Ctrl+X to move data. Using "Cut" or Ctrl+X will result in errors and will prevent auto-calculation.

Figure 6. Tab 4 v.1.0/v1.1/v1.2/v1.3



LEA Name

Fiscal Year	Amount of IDEA Part B, Section 611 Subgrant	Amount of IDEA Part B, Section 619 Subgrant	Total IDEA Part B Subgrant	Repayment Amount (Compliance Test Only)	Date SEA Paid Amount (from Non-federal Funds) to the US Treasury	Date LEA Paid Amount (from Non-federal Funds) to the SEA, if required
2010-2011	$ 1,245,865.00	$ 38,765.00	$ 1,284,630.00	$ -		
2011-2012	$ 1,246,278.00	$ 37,388.00	$ 1,283,666.00	$ -		
2012-2013	$ 1,254,917.00	$ 37,648.00	$ 1,292,565.00	$ -		
2013-2014	$ 1,253,647.00	$ 37,609.00	$ 1,291,256.00	$ -		
2014-2015	$ 1,255,257.00	$ 37,658.00	$ 1,292,915.00	$ -		
2015-2016	$ 1,349,586.00	$ 40,488.00	$ 1,390,074.00	$ -		
2016-2017	$ 1,450,350.00	$ 40,488.00	$ 1,490,838.00	$ 120,415.00	8/28/2017	12/15/201
2017-2018	$ 1,452,185.00	$ 43,565.00	$ 1,495,750.00	$ -		
2018-2019	$ 1,465,387.00	$ 43,961.00	$ 1,509,348.00	$ -		

Amounts Tabs

From the Amounts tab, you will need to copy any data you entered for both eligibility and compliance. Our picture and example will demonstrate copying data from the compliance side on the right. For eligibility, select the comparable cells. First, be sure to copy (or re-enter) the Projected Child Count (B1) and/or Child Count (I1). Then copy all budget (B5-E29) or expenditure (H5-L29) data you have entered. You only need to copy rows that contain data. If you changed the headers in row 4, you should either copy or re-enter those. Paste into the same cells in v1.3 of the Calculator. Repeat for the 16-17 Amounts tab and any other Amounts tab where you entered data.

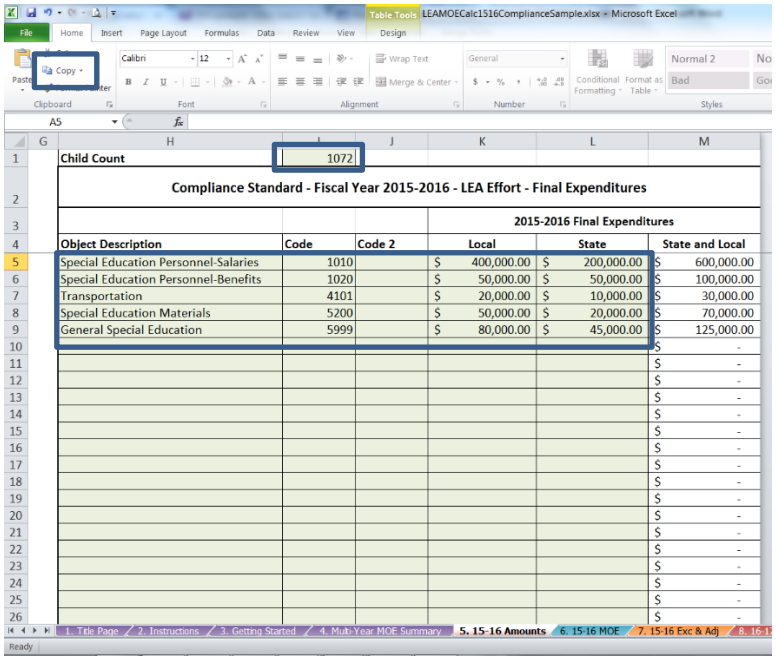
It is recommended that you paste values to avoid copying embedded formatting elements from the old version of the Calculator.

1. To copy data, you can either select the "Copy" button on your menu bar/ribbon in Excel or you can use Ctrl+C.
2. To paste values, you can use one of the following methods:
    a. Select the "Paste" button on your menu bar/ribbon in Excel or use Ctrl+V. After pasting, click on the clipboard icon that appears in the bottom right of the pasted text and select the far left option under "Paste Values."
    b. Go to the Home tab on your ribbon, click on the arrow under "Paste" and select the far left option under "Paste Values."
    c. Right click in the first destination cell and select the second option from the left under "Paste Options" for "Paste Values."

The "Paste Values" icon is a clipboard with "123" at the bottom:

Note: Do NOT use "Cut" or Ctrl+X to move data. Using "Cut" or Ctrl+X will result in errors and will prevent auto-calculation.

Figure 7. Amounts Tabs v.1.0/v1.1/v1.2/v1.3



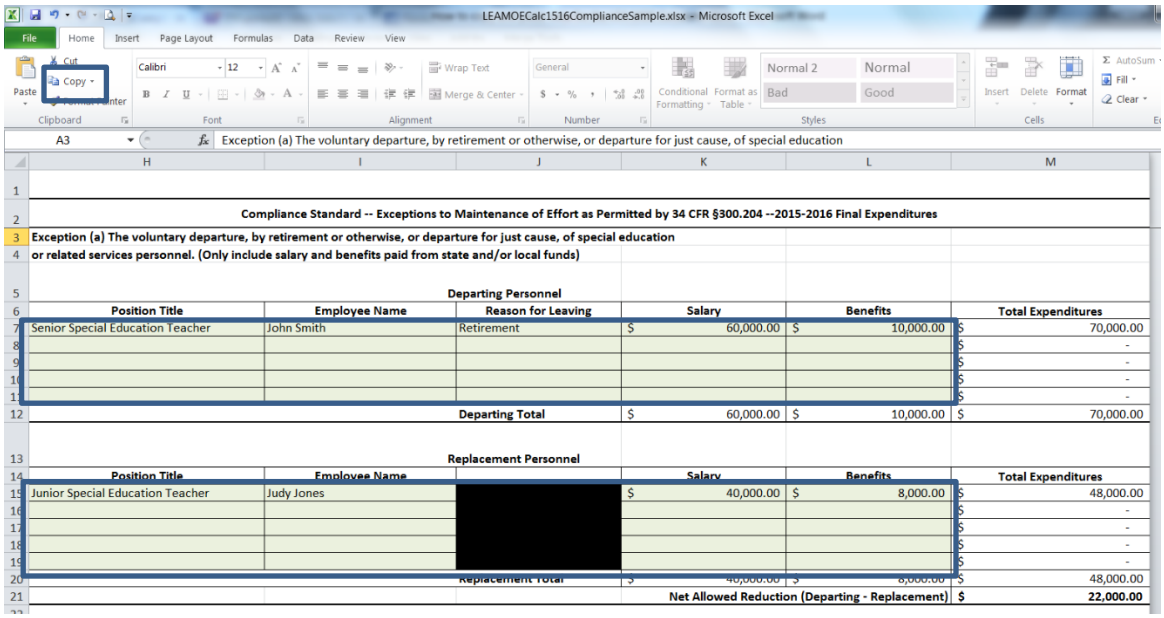
Exc & Adj Tabs

From the Exc & Adj tabs, you will need to copy data for each exception and adjustment separately. For 2015–16 and later years, you will need to copy data you entered for eligibility and compliance. Our examples will demonstrate copying data from the compliance side. You will need to choose the comparable cells for the eligibility side (left).

Note: Do NOT use "Cut" or Ctrl+X to move data. Using "Cut" or Ctrl+X will result in errors and will prevent auto-calculation.

For exception (a) on the compliance side, copy Cells H7-L11 for Departing Personnel. For Replacement Personnel, copy Cells H15-L19. Paste all data into the same cells in v1.3.

Figure 8. Exc & Adj Tabs v.1.0/v1.1/v1.2/v1.3

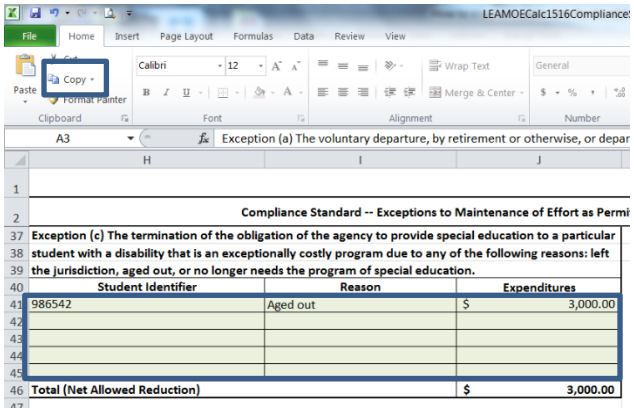


Exc & Adj Tabs (Continued)

For exception (b), you will only need to copy data if you chose to use a manual calculation. If you chose to use the Calculator's auto-calculation, all calculations will be done in v1.3. For manual data entry, copy cells I25-L25 on the compliance side and paste into the same cells in v1.3.

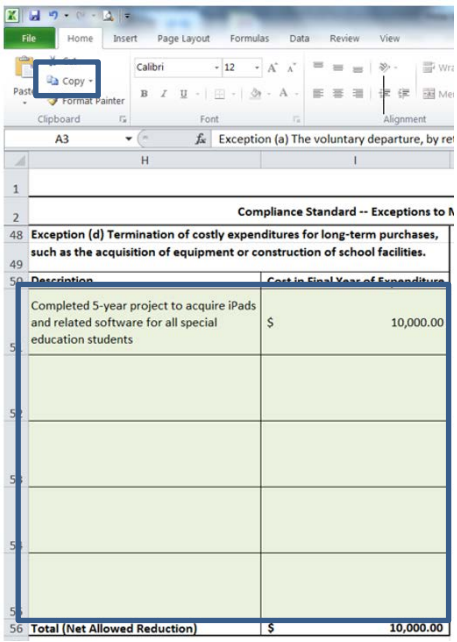
For exception (c) on the compliance side, copy cells H41-J45 and paste into the same cells in v1.3.

Figure 9. Exc & Adj Tabs v.1.0/v1.1/v1.2/v1.3



For exception (d) on the compliance side, copy cells H51-I55 and paste into the same cells in v1.3.

Figure 10. Exc & Adj Tabs v.1.0/v1.1/v1.2/v1.3



Exc & Adj Tabs (Continued)

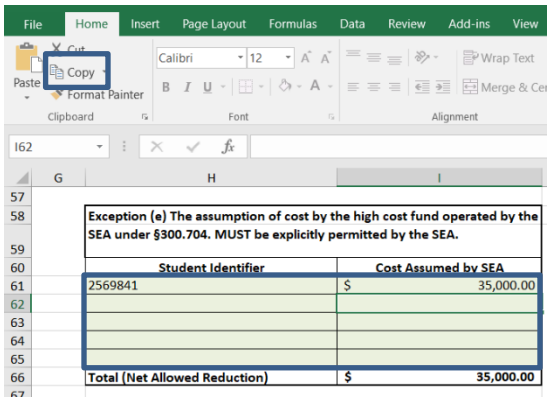
For exception (e) on the compliance side, copy cells H61-I65 and paste into the same cells in v1.3. This will not be needed or possible if the exception is not permitted and the cells are shaded black.

It is recommended that you paste values to avoid copying embedded formatting elements from the old version of the Calculator.

1. To copy data, you can either select the "Copy" button on your menu bar/ribbon in Excel or you can use Ctrl+C.
2. To paste values, you can use one of the following methods:
    a. Select the "Paste" button on your menu bar/ribbon in Excel or use Ctrl+V. After pasting, click on the clipboard icon that appears in the bottom right of the pasted text and select the far left option under "Paste Values."
    b. Go to the Home tab on your ribbon, click on the arrow under "Paste" and select the far left option under "Paste Values."
    c. Right click in the first destination cell and select the second option from the left under "Paste Options" for "Paste Values."

The "Paste Values" icon is a clipboard with "123" at the bottom:

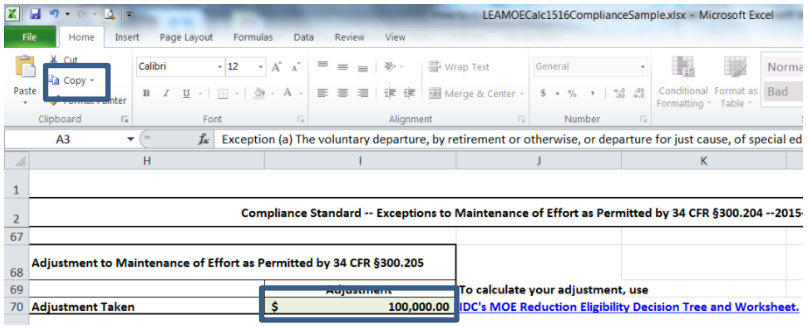
Figure 11. Exc & Adj Tabs v.1.0/v1.1/v1.2/v1.3



Exc & Adj Tabs (Continued)

For the MOE adjustment on the compliance side, copy cell I70 to the same cell in v1.3.

Figure 12. Exc & Adj Tabs v.1.0/v1.1/v1.2/v1.3



Repeat these steps for exceptions (a) through (e) plus the adjustment for each Exc & Adj tab where you entered data, being sure to copy data from both the eligibility and the compliance sides as needed.

MOE Tabs

Copying and pasting is not needed on the MOE tabs, because all values are calculated. You should verify that cell B1 is set to the appropriate standard, Eligibility or Compliance. The starting value for version 1.3 is Compliance for 2015–16, 2016–17, and 2017–18 and Eligibility for 2018–19 and 2019–20.

Tab 24. LEA or SEA Worksheet

Do not forget to copy anything you entered on this tab to the same tab in v1.3. If you created any links to this tab, such as for exception (a) on the Exc & Adj tabs, you will need to update those formulas.

Compare Data

After you have copied all of your data into version 1.3 of the LEA MOE Calculator, compare the Multi-Year MOE Summaries from the two Calculators. If anything does not match, double check your data entry. If there are still discrepancies, contact cifr_info@wested.org or your CIFR TA provider for further assistance.

Checklist

Use the checklist below to track the data migration process.

Table 1. Data Migration Checklist

Tab	Notes
☐ **Tab 3. Getting Started**	
☐ **Tab 4. Multi-Year MOE Summary**	
☐ **Tab 5. 15-16 Amounts**	
☐ **Tab 7. 15-16 Exc & Adj**	
☐ **Tab 8. 16-17 Amounts**	
☐ **Tab 10. 16-17 Exc & Adj**	
☐ **Tab 11. 17-18 Amounts**	
☐ **Tab 13. 17-18 Exc & Adj**	
☐ **Tab 14. 18-19 Amounts**	
☐ **Tab 16. 18-19 Exc & Adj**	
☐ **Tab 17. 19-20 Amounts (if needed)**	
☐ **Tab 19. 19-20 Exc & Adj (if needed)**	
☐ **Tab 20. 11-12 Exc & Adj (if needed)**	
☐ **Tab 21. 12-13 Exc & Adj (if needed)**	
☐ **Tab 22. 13-14 Exc & Adj (if needed)**	
☐ **Tab 23. 14-15 Exc & Adj (if needed)**	
☐ **Tab 24. LEA or SEA Worksheet (if needed)**	
☐ **Compare Multi-Year MOE Summary from old Calculator with Summary in version 1.3** o **2015-16** o **2016-17** o **2017-18** o **2018-19** o **2019-20 (if needed)**	