Charter Online Management and Performance System (COMPS)

**Charter Management Organization (CMO) Program**

Grant Profile Data Guide

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Comps.ed.gov

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# Data Introduction

## Overview

This document provides a description of the data elements used to describe the implementation and performance of CSP Grantees as part of the Charter School Programs (CSP) Data Collection, Risk Assessment, and Monitoring contract (GS-10F-0288W) and the Charter Online Management and Performance System (COMPS).

The Charter Schools Program (CSP) grant program serves the purpose of Section 5201 of the Elementary and Secondary Education Act of 1965 (ESEA), which seeks to expand the number of high-quality charter schools and increase national understanding of the charter school model.

## Purpose

The Charter Online Management and Performance System **(COMPS)** is a web-based application designed to assist ED in conducting compliance and performance monitoring activities for CSP Grantees. COMPS accumulates evidence of compliance and performance from Grantees, as well as provides the ability to capture previously reported data in a more secure and efficient manner. The vision is that COMPS will:

* Streamline the collection of data relating to the CSP monitoring of CMOs using COMPS.
* Provide a comprehensive performance and knowledge management platform.
* Collect grant-recipient performance data, import budget data, perform analytics, automate key document and reporting workflows, and enable two-way communication between OESE and Grantees.

Grantees currently submit their Annual Performance Reports through the ED 524B generic form, and report on funding to schools using the Excel-based *CSP Data Collection Form*. The new collection for grantees will combine and refine the data elements form each, and provide for reporting via a web-based platform.

Two modules in COMPS are covered within this data guide. They are:

* School/Subgrant Data Collection Module: Based on the current CSP Data Collection Form, this module allows the Department to monitor CSP grant performance and analyze data related to accountability for academic performance and financial integrity. Grantees submit data twice per year (Spring and Fall) to update school information, obligations, operational statuses etc.
* Annual Performance Reports (APR) Module: Based on the “paper form” that is submitted to the Department today, this module allows grantees to submit their APRs twice per year (Spring and Fall) to enter narratives on their performance towards meeting performance measures and budget.

Authorized users submit their APRs using this system. In each subsequent reporting period, grantee users will only be required to update those sections of the performance report that have new activity or outcomes, thereby eliminating the need to re-enter the same static information each year. This is the most efficient way to collect and review performance reports at the grantee and program level. It also allows for rapid dissemination of data collected as it is collected via the web-based system and stored in a secure database. ED staff can access the data at any time to respond immediately to Congress. Select data elements are made available to authorized grantee users via the web-based application.

The purpose of this document is to outline the data architecture and key data elements associated with the APR and School/Subgrant Data Collection module for CMO Grantees. This data guide defines the fields collected in the COMPS APR and School/Subgrant Data Collection modules for CMO grantees. It is to be used in conjunction with the CMO COMPS APR and School/Subgrant Data Collection User Guide for a complete understanding of the system and process.

# Data Workflow/Architecture

## Workflow

The following steps depict the high-level workflow:

1. Grantees will have filled out a Grant Profile for their associated CSP award (see Grant Profile User Guide).
2. Each reporting period (spring and then the fall), ED will open the system for reporting.
3. Grantees will enter the School/Subgrant Data Collection Module to submit data associated to their grant award.
4. Grantees will fill out the requirement information and add a subgrant (if new), or update subgrants (e.g., obligations made).
   1. Please note: The subsequent sections/screenshots show the “add” school aspect of the process. Grantees can also click to edit prior subgrant submissions. This has the same data fields but would display what they had previously submitted.
5. Grantees will submit it back to ED/Contractor for review.
6. ED/Contractor will review, and either approve or reactivate the submission.
7. If reactivated, the grantees will add or correct information and resubmit the information back to ED.
8. Information submitted in the School/Subgrant Data Collection module will feed into the APR module.
9. Once a data collection form has been submitted within a reporting period (Spring/Fall), the Grantee will then be able to access the APR module.
10. Grantees will fill out the required information in the APR.
    1. Note: After the first APR submission, data is saved and then redisplayed to Grantees for.
11. Grantees will submit it back to the Department for review.
12. ED will review, and either approve or reactivated.
13. If reactivated, the grantee will add or correct information and resubmit.
14. The process repeats each Spring and Fall until the grant award is closed out.

## Data Architecture

The database for COMPS is contained in a Microsoft SQL Server instance contained within the virtual machine running the web application.

## Logical Data Model

The following diagram is a simple example of how the User Account Management, Grant Profile modules, School/Subgrant Data Collection and APR modules are linked, with interactions by users.



# School/Subgrant Collection

## Overview

The School/Subgrant Data Collection module is an online version of the previously used, excel based CSP Data Collection form. This module is used to collect information to ensure compliance and gauge program impact. ED seeks to collect descriptive information about program operation from each grantee. Also, ED seeks to collect school-level information on the operational statuses of all CSP-funded schools; amounts obligated and paid to CSP-funded schools; CMO and Authorizer information; and other school-level data (Title I status, school type, etc.). This module will be utilized twice a year by all CSP grantees funded through the CMO program. The module is considered part of the reporting requirement for grantees and, as such, is typically administered in conjunction with the Annual Performance Report (APR) and again six months following (usually as grantees are submitting updated budget documents to CSP).

## Data Dictionary

The following sections describe the data tables, data fields, and descriptions for the School/Subgrant Data Collection module.

### Data Collection Forms

This table creates unique forms for each data collection entry across reporting periods.

|  |  |
| --- | --- |
| Field | Data Type |
| DataCollectionFormId | Unique identifier for each submitted school/subgrant data collection form. |
| DueDateUtc | Due date of the form for the reporting period. |
| FormStatus | The state the form is in. Values can be:   1. Not Available for Reporting 2. New 3. Open For Submission 4. Draft Submitted 5. Reopened for Revisions 6. Initial Review Complete 7. Complete |
| GrantAwardId | Unique Identifier for the Grantee’s award. |
| LastModifiedDateUtc | Data the form/module was last modified. |

### Charter Schools

This table describes the data elements Grantees view and interact with when adding (or editing) a school award. Specifically, it captures the Charter School Information.

|  |  |
| --- | --- |
| Field | Description |
| CharterSchoolId | Unique identifier for the individual Charter School. |
| Name | Name of the Charter School that Grantees enter. |
| NcesId | Unique identifier for a school. The first 2 digits identify the state and the last 5 digits identify the school district. Combined, they make a unique 7-digit ID for each school district. |
| GrantType | Type of grant for the school. Grantees can select the following values:  “Replication”  “Expansion” |
| Address1 | Address of the school. |
| Address2 | Address of the school (if needed). |
| City | City where the school is located. |
| UsStateId | Unique identifier for the state the school is located in. |
| ZipCode | Zip code for the school. |
| ProjectBeginDate | Date the Grantee’s project began. |
| ProjectEndDate | Date the Grantee’s project ends. |

### Local Education Agencies

This table describes the data elements Grantees view and interact with when adding (or editing) a school award. Specifically, it captures the Local Education Agencies Information.

|  |  |
| --- | --- |
| Field | Description |
| LocalEducationAgencyId | Unique identifier for the LEA. |
| Name | Name of the LEA. |
| NcesId | Unique NCES ID for the LEA. |
| Address1 | Address of the LEA. |
| Address2 | Address of the LEA (if needed). |
| City | City LEA is located in. |
| UsStateId | State the LEA is located in. |
| ZipCode | Zip code of the LEA. |
| HasOnlyCharterSchools | Yes/No if the LEA only has charter schools. |
| ActsAsOwnLea | If the Charter School acts as its own LEA. |

### Authorizer

This table describes the data elements Grantees view and interact with when adding (or editing) a school award. Specifically, it captures the Authorizer Information.

|  |  |
| --- | --- |
| Field | Description |
| AuthorizerId | Unique identifier for the Authorizer. |
| AuthorizerType | Grantee can select:  Local Education Agency (LEA)  State Education Agency (SEA)  Non-Profit Organization (NPO)  Higher Education Institute (HEI)  Independent Chartering Board  Mayor/Municipal Office |
| Name | Name of the Authorizer. |
| HasReligAffiliation | Yes/No question if the Authorizer has a religious affiliation. |
| AuthorizedDate | Date Authorized or Renewed. |
| Address1 | Address of the Authorizer. |
| Address2 | Address of the Authorizer (if needed). |
| City | City Authorizer is located in. |
| UsStateId | State the Authorizer is located in. |
| ZipCode | Zip code of the Authorizer. |

### Charter School Management Information

This table describes the data elements Grantees view and interact with when adding (or editing) a school award. Specifically, it captures the Charter School Management Information. CMO grantees can add multiple management organizations.

|  |  |
| --- | --- |
| Field | Description |
| MgmtOrgID | Unique identifier for the management organization. |
| MgmtOrg Affiliation | Yes/No question if the school is affiliated with a management organization. |
| MgmtOrgType | Grantees can select:  Non-profit Charter Management Organization (CMO)  For-profit Education Management Organization (EMO)  Other |
| Name | Name of the Charter School Management organization. |
| Address1 | Address of the Charter School Management organization. |
| Address2 | Address of the Charter School Management organization (if needed). |
| City | City Charter School Management organization is located in. |
| UsStateId | State the Charter School Management organization is located in. |
| ZipCode | Zip code of the Charter School Management organization. |
| RolesandResp | Text box that Grantees enter to describe the roles and responsibilities of the Charter School Management organization. |

### Charter School Characteristics

This table describes the data elements Grantees view and interact with when adding (or editing) a school award and its operational information. Specifically, it captures the Charter School Characteristics.

|  |  |
| --- | --- |
| Field | Description |
| OperationalStatus | Grantees select from the following values:  Open  Future  Closed  Will Not open |
| YearEnrolled | Year the school first enrolled students. |
| VirtualStatus | The virtual status of the school. The Grantee can select from the following values:  Full Virtual  Primarily Virtual  Supplemental Virtual  Not Virtual |
| OpeningDate | The anticipated opening date of the school if “Future” is selected. |
| Explanation | If delayed, closed or non-start is selected, Grantees input a rationale and/or explanation. |
| TitleStatus | Grantees select from the following values:  Schoolwide Program  Targeted Assistance School  Not Title I |
| SchoolType | Grantees select from the following values:  Alternative  Technical  Traditional  Special Education |
| IsFullService | Yes/No selection Grantees make if the school is a full-service community school. |
| IsMagnet | Yes/no selection Grantees make if the school is a magnet school. |
| IsCEFunded | Yes/no selection Grantees make if the school has received funding support through the CSP’s Credit Enhancement (CE) program. |

### Charter School Characteristics

This table describes the data elements Grantees view and interact with when adding (or editing) a school award and its operational information. Specifically, it captures the Lottery, Enrollment and Demographic Information.

|  |  |
| --- | --- |
| Field | Description |
| IsWeightedLottery | Yes/No selection Grantees make if the charter school used a weighted lottery. |
| IsUnifiedSchool | Yes/No selection Grantees make if the charter school participates in a unified school placement lottery. |
| GradesFunded | Cell Grantees input for the grades funded for expansion. |
| GradesOffered | Cell Grantees input for the grades offered for expansion. |
| PlannedEnrollment | Cell Grantees input for planned enrollment. |
| TotalEnrollment | Cell Grantees input for total enrollment. |
| Waitlist | Cell Grantees input for waitlist numbers. |

### School Award Information

This table describes the data elements Grantees view and interact with when adding (or editing) a school award and the individual school (transaction) periods.

|  |  |
| --- | --- |
| Field | Description |
| SubgrantObligationId | Unique identifier for the specific obligation transaction. |
| BudgetPeriodId | Calendar selection Grantees make for the begin and end date of the budget period for the school. |
| DollartAmtPaid | The dollar amount paid to the school. |

### Additional Information

This table describes the data elements Grantees view and interact with when adding (or editing) a school award and the final comments they make on it, prior to submission.

|  |  |
| --- | --- |
| Field | Description |
| SubgrantAwardId | Unique identifier for the award submission. |
| Comments | Text box Grantees can fill out any additional comments/information prior to submission. |

# APR Collection

## Overview

Grantees currently submit their Annual Performance Reports through the ED 524B standard form, and report on funding to schools using the Excel-based CSP Data Collection Form. The new collection for grantees will combine and refine the data elements form each, and provide for reporting via a web-based platform. CMO grantees will complete the following sections:

* Executive Summary
* Performance Measures Reporting
* Priorities and Requirements
* Pipeline
* Subgrant Application and Peer Review
* Lottery
* Education Program
* Budget Details
* Budget Implications

## Data Dictionary

The following sections describe the data tables, data fields, and descriptions for the APR module.

### APR Reports and Grant Award

This table describes the key data elements associated to the unique grant award and unique APR record that is generated for each APR submission.

|  |  |
| --- | --- |
| Field | Description |
| AnnualPerformanceReportId | Unique system identifier for the APR record. |
| AprGrantAwardId | Unique system identifier for the referenced Grant Award record. |
| FedFiscalYearAwarded | Year the grant was awarded. |
| ProjectTitle | Title of the grant. |
| FedFiscalYearReported | Current fiscal year the APR record is for. |
| LastModifiedDateUtc | Date there were changes to the APR record. |
| ReportingPeriodBeginDateUtc | Begin date of the reporting period for the APR record. |
| ReportingPeriodEndDateUtc | End date of the reporting period for the APR record. |
| ReportStatus | Code that identifies the status of the APR: 0 - New 1 - InProgress 2 - Submitted 3 - Approved 4 - Revise 5 - Complete |
| ReportTypeId | Code that identifies the type of the APR form: 0 - APR 1 - AdHoc |

## Coverpage

This table describes the data elements Grantees view and interact with when completing the Coverpage section of the APR. It includes Human Subject and Data Privacy and Security measures.

|  |  |
| --- | --- |
| **Field** | **Description** |
| AprId | Unique identifier for the APR form submission. |
| HumanSubjects | Display for IRB approval not required. |
| DataPrivacyUpload | Document upload Grantees make for their data privacy and security measures documentation. |
| DataPrivacyCertifcation | Yes/No question Grantees respond to if their current data privacy and security measures documentation is up-to-date. If no, they are asked to reupload. |

## Assurances

This table describes the data elements Grantees view and interact with when completing the Assurances section of the APR.

|  |  |
| --- | --- |
| **Field** | **Description** |
| AssuranceId | Unique system identifier for the assurance line-item record. |
| AprId | Unique identifier for the APR form submission. |
| RowNo | System ID used to order the items on screen. A number indicating the order that the priority should be placed in. |
| Description | Specific assurances description that was input by ED for the cohort. |

The following are the line-item data elements for assurances.

|  |  |
| --- | --- |
| **Field** | **Description** |
| AssurancesSubLineLitemId | Unique system identifier for the assurance sub line-item record. |
| AssurancesTemplateLineItemId | Associated the sub-line item to the appropriate assurances template generated by ED. |
| Description | Specific assurances sub-item description that was input by ED for the cohort. |
| RowNo | System ID used to order the items on screen. A number indicating the order that the priority should be placed in. |

## Executive Summary

This table describes the data elements Grantees view and interact with when completing the executive summary section of the APR.

|  |  |
| --- | --- |
| **Field** | **Description** |
| AprId | Unique identifier for the APR form submission. |
| ExecSummaryUpload | Document upload Grantees make for their executive summary. |

## Performance Measure Status

This table describes the data elements Grantees view and interact with when completing the Performance Measures Status section of the APR.

|  |  |
| --- | --- |
| **Field** | **Description** |
| AprId | Unique identifier for the APR form submission. |
| CompleteData | Yes/No question Grantees answer if they have complete data on performance measures. |
| Explain | If Grantees select No, they are prompted to explain the cause of the delays. |
| AvailDate | Calendar selection for when the information will be available and submitted to the Department. |

## Performance Measures and Objectives Reporting

This table describes the data elements Grantees view and interact with when completing the Performance Measures Reporting section of the APR.

|  |  |
| --- | --- |
| Field | Description |
| AprId | Unique identifier for the APR form submission. |
| AprProjectObjectiveId | Unique identifier for the project objective. |
| AprPerformanceMeasureId | Unique identifier for the performance measure tied to the project objective. |
| RowNo | System ID used to order the items on screen. A number indicating the order that the performance measures and objectives should be placed in. |
| Title | Display of the title of the performance objective and measure. |
| InProgressStatus | Status of progress selection Grantees make under a performance measure if it is still “in-progress.” |
| MetStatus | Status of progress selection Grantees make under a performance measure if it is still “met.” |
| NotMetStatus | Status of progress selection Grantees make under a performance measure if it is still “not met.” |
| TargetValue | The value imported from the Grant Profile. |
| ActualValue | The actual value at the time of the APR. |
| ProgressDesc | A text box description Grantees use to provide additional information (e.g., challenges faced). |
| NotMetDesc | A text box description Grantees use to provide additional information if a measure has not been met. |

## Competition Priorities and Requirements

This table describes the data elements Grantees view and interact with when completing the competition priorities and requirements section of the APR.

|  |  |
| --- | --- |
| Field | Description |
| CompetitionPriorityId | Unique identifier of the competition priority, imported from the Grant Profile. |
| AprId | Unique identifier for the APR form submission. |
| RowNum | System ID used to order the items on screen. A number indicating the order that the priority should be placed in. |
| PriorityDescription | Description of the associated competition priority. |
| PriorityChanges | Yes/No select Grantees make if there have been changes to the competition priorities and requirements since the last submission. |
| GranteeResponse | Input from the Grant Profile/last APR submission. Field becomes editable if Grantees select “yes” to if there have been changes. |

## Priorities and Requirements – Governance and Management Plan

This table describes the data elements Grantees view and interact with when completing the governance and management plan section of the APR.

|  |  |
| --- | --- |
| Field | Description |
| AprId | Unique identifier for the APR form submission. |
| GovernanceChanges | Yes/No select Grantees make if there have been changes to the grantee’s governance board policies during the current budget period. |
| GovernanceGranteeResponse | If Grantees select yes, they need to describe the changes. |

## Priorities and Requirements – Management Organizations

This table describes the data elements Grantees view and interact with when completing the management organizations section of the APR.

|  |  |
| --- | --- |
| Field | Description |
| AprId | Unique identifier for the APR form submission. |
| EMOESPChange | Yes/No select Grantees make if there have been changes to the grantee’s Education Management Organizations (EMOs) or Education Service Providers (ESPs) during the current budget period. |
| MgmtLegalChange | Yes/No select Grantees make if there have been changes to the grantee’s management and/or legal relationship with its subrecipient schools during the current budget period. |
| PerformanceContract | Yes/No select Grantees make if other organizations have a performance contract with an authorized public chartering agency to operate or manage one or more of the subrecipient schools. |
| GovernanceGranteeResponse | If Grantees select yes to any of the questions above, they need to describe the changes. |

## Priorities and Requirements – Succession Plan

This table describes the data elements Grantees view and interact with when completing the succession plan section of the APR.

|  |  |
| --- | --- |
| Field | Description |
| AprId | Unique identifier for the APR form submission. |
| SuccessionPlanUpload | Document upload for a Grantee’s succession plan. |
| IsSuccessionDeveloped | Check mark Grantees select if a succession plan has not been developed. |
| SuccessionGranteeResponse | Description if Grantees need to develop a succession plan. |
| SuccessionDate | Calendar selection Grantees make to mark the anticipated completion date of the succession plan. |
| KeyPersonnelChanges | Yes/No select Grantees make if there have been changes to key grant personnel during the current budget period. |
| PersonnelChangeResponse | Description of the personnel changes. |

## Priorities and Requirements – Transportation Plan

This table describes the data elements Grantees view and interact with when completing the transportation plan section of the APR.

|  |  |
| --- | --- |
| Field | Description |
| AprId | Unique identifier for the APR form submission. |
| TransportChanges | Yes/No select Grantees make if there have been changes to the transportation plan. |
| TransportChangeResponse | Description of the changes. |

## Priorities and Requirements – Closure Plan

This table describes the data elements Grantees view and interact with when completing the closure plan section of the APR.

|  |  |
| --- | --- |
| Field | Description |
| AprId | Unique identifier for the APR form submission. |
| ClosurePlanFilePath | A document Grantees uploaded in their Grant Profile. |
| ClosureChanges | Yes/No select Grantees make if there have been changes to the closure plan. |
| ClosureChangeResponse | Description of the changes. |

## Pipeline

This table describes the data elements Grantees view and interact with when entering pipeline information.

|  |  |
| --- | --- |
| Field | Description |
| BudgetPeriodId | Unique dates pulled for the Grantee based on their cohort budget period dates and their grant duration. |
| CohortTemplateLineItemId | Pulls the Grantee’s cohort budget period dates. |
| GrantAwardId | Unique ID for the grant award. |
| CurrBPExpansionSchoolCount | Display the expansion numbers populated in Grant Profile for the current budget period. |
| CurrBPReplicationSchoolCount | Display the replication numbers populated in Grant Profile for the current budget period. |
| CurrRPExpansionSchoolCount | The number of expansion schools in the current reporting period. |
| CurrRPReplicationSchoolCount | The number of replication schools in the current reporting period. |
| RemCurrBPExpansionSchoolCount | The remainder of expansion schools in the current budget period. |
| RemCurrBPReplicationSchoolCount | The remainder of replication schools in the current budget period. |
| CurrBudgetPeriodSchoolTotal | System calculation to add all the current budget period entries across expansion and replication of subrecipients. |
| CurrReportingPeriodSchoolTotal | System calculation to add all the current reporting period entries across expansion and replication of subrecipients. |
| RemCurrBudgetPeriodSchoolTotal | System calculation to add all the remainder of current budget period entries across expansion and replication of subrecipients. |
| SubrecipientSchoolStatus | Yes/No question Grantees will enter if they are on track to meet the number of projected subrecipient schools for the current budget period. |
| SubrecipientSchoolDesc | If Grantees select No, they are required to add a description of the extenuating circumstances that will impact the grantee’s ability to meet the projected number of subrecipient schools funded during the current budget period. |
| CurrBPExpansionSeatCount | Display the expansion numbers populated in Grant Profile for the current budget period. |
| CurrBPReplicationSeatCount | Display the replication numbers populated in Grant Profile for the current budget period. |
| CurrRPExpansionSeatCount | The number of expansion seats in the current reporting period. |
| CurrRPReplicationSeatCount | The number of replication seats in the current reporting period. |
| RemCurrBPExpansionSeatCount | The remainder of expansion seats in the current budget period. |
| RemCurrBPReplicationSeatCount | The remainder of replication seats in the current budget period. |
| CurrBudgetPeriodSeatTotal | System calculation to add all the current budget period entries across expansion and replication of seats. |
| CurrReportingPeriodSeatTotal | System calculation to add all the current reporting period entries across expansion and replication of seats. |
| RemCurrBudgetPeriodSeatTotal | System calculation to add all the remainder of current budget period entries across expansion and replication of seats. |
| NumberSeatsStatus | Yes/No question Grantees will enter if they are on track to meet the number of seats funded for the current budget period. |
| NumberSeatsDesc | If Grantees select No, they are required to add a description of the extenuating circumstances that will impact the grantee’s ability to meet the projected number of seats funded during the current budget period. |
| MeetPipelineApprovals | Yes/No question Grantees will enter if they expect to meet the approved number of subrecipients and seats funded for the next budget period. |
| PipelineDescription | If Grantees select No, they are required to describe the extenuating circumstances impacting their ability to meet the approved numbers. |

## Lottery

The table below describes the data that is displayed to Grantees, and is required for Grantees to submit, for their lotteries as part of their grant project status submission.

|  |  |
| --- | --- |
| Field | Description |
| GrantAwardId | Unique ID of the Grantee and award. |
| IsLotteryPlanChanged | Grantee will select yes or no if the lottery plan has changed. |
| LotteryPolicyFilePath | Grantees will then be required to upload the lottery plan document if they select yes. |
| IsLotteryWeight | Grantee will select yes or no if the plan includes weights. |
| IsLotteryApproved | Grantee will select yes or no if the plan is approved. |
| PrefersEmployeeChildLottery | If their lottery plan has an allowable preference for “sibling.” |
| PrefersOtherLottery | If their lottery plan has an allowable preference for “other.” |
| PrefersOtherLotteryDesc | If PrefersOtherLottery is selected, Grantees are required to input data in a text box. |
| PrefersSchoolFounderChildLottery | If their lottery plan has an allowable preference for “Children of school founders.” |
| PrefersSiblingLottery | If their lottery plan has an allowable preference for “Children of employees.” |

## Grant Project Status – Educational Program

The table below describes the data that is displayed to Grantees, and is required for Grantees to submit, for educational program as part of their APR.

|  |  |
| --- | --- |
| Field | Description |
| EducProgramChange | Yes/No question Grantees respond to on whether there are changes to the educational programming at the school. |
| EducProgramResponse | If Grantees select yes, they are prompted to provide a description of the changes and whether they have been approved. |
| NeedsAssessmentChange | Yes/No question Grantees respond to on whether they have conducted an updated needs assessment during the current budget period. |
| NeedsAssessmentResponse | If Grantees select yes, they are prompted to provide a description of the changes. |

## Grant Project Status – Racially and Socio-Economically Diverse Schools

The table below describes the data that is displayed to Grantees, and is required for Grantees to submit, for racially and socio-economically diverse school requirements as part of their APR.

|  |  |
| --- | --- |
| Field | Description |
| RacialDiverseSchools | A text box Grantees respond to, describing the grantee’s continued efforts to address the racially and socio-economically diverse schools application requirement. |
| ReplicationExpansionResponse | A text box Grantees respond to, describing the grantee’s efforts to ensure the replication and/or expansion of its grant-funded schools will not affect any desegregation efforts in the communities in which the schools are located. |

## Grant Project Status – Parent and Community Engagement

The table below describes the data that is displayed to Grantees, and is required for Grantees to submit, for parent and community engagement requirements as part of their APR.

|  |  |
| --- | --- |
| Field | Description |
| ParentEngagement | A text box Grantees respond to, describing the grantee’s efforts to solicit and consider input from parents and the community. |

## Budget – Indirect Costs

The table below describes the data that is displayed to Grantees, and is required for Grantees to submit, for their indirect costs as part of their APR submission.

|  |  |
| --- | --- |
| **Field** | **Description** |
| GrantAwardId | Unique system identifier for the referenced grant award. |
| IndirectCostChanges | Yes/No question if there have been changes to the grantee’s indirect cost information. If so, the fields below become editable. |
| IsIndirectCost | Grantees select this action if they claim indirect cost. |
| FederalGovtApproved | If the following applies to a Grantees indirect cost agreement: “The Grantee has an Indirect cost Rate Agreement approved by the Federal Government.” |
| DeMinimusRate | If the following applies to a Grantees indirect cost agreement: “The Grantee is not a State, local government, or Indian tribe, and is using the de minimus rate of 10% of modified total direct costs (MTDC) in compliance with 2 CFR 200.414(f).” |
| RestrictedRateProgram | If the following applies to a Grantees indirect cost agreement: “The Grantee is funded under a Restricted Rate Program and is using a restricted indirect cost rate that either.” |
| TrainingRateProgram | If the following applies to a Grantees indirect cost agreement: “The Grantee is funded under a Training Rate Program and:” |
| EdAgencyApproved | If ED is selected for the approving federal agency. |
| OtherAgencyApproved | If “other” agency is selected. |
| OtherApprovingAgencyName | Description to input another agency name. |
| RateAgreementBeginDateUtc | Period covered by the indirect Cost Rate Agreement. |
| RateAgreementEndDateUtc | Period covered by the indirect Cost Rate Agreement. |
| RestrictedRateProgramOptions | Grantee can select “is included in approved Indirect Cost Rate Agreement” or “Complies with 34 CFR 76.564(c)(2)”. |
| TrainingRateProgramOptions | Grantee can select “recovering indirect cost using 8% of MTDC in compliance with 34 CFR 76.564(c)(2)” or “Recovering indirect cost using its actual negotiated indirect cost rate reflected in 9(b)". |

## Budget Details

The table below describes the data that is displayed to Grantees, and is required for Grantees to submit, for their approved budget as part of their Grant Profile submission.

|  |  |
| --- | --- |
| **Field** | **Description** |
| ApprovedBudgetId | Unique system identifier for the approved budget record. |
| ApprovedBudgetNarrativeFilePath | A budget narrative document Grantee’s will upload prior to filling out their approved budgets. |
| BudgetPeriodId | Unique system identifier for the referenced budget period record. |
| Category | Code to identify the category of the budget amount: 0 - Personnel 1 - Fringe Benefits 2 - Travel 3 - Equipment 4 - Supplies 5 - Contractual 6 - Indirect Costs 7 – Other  8 – Indirect Costs |
| InitialApprovedBudget | The approved budget total, broken down by budget category, pulled directly from the Grant Profile. |
| IncurredCosts | Grantees will enter the amount of funds expended during the reporting period for each category. |
| AnticipatedCosts | Grantees will enter the amount of funds before the grant budget period ends for each category. |
| Carryover | Auto generated cell that calculates the amount of funds the grantee will carry over to the next budget period for each category. |
| ExpendExplanation | Grantees provide a description of what the grantee expended or will expand before the end of the budget period. Grantees will fill this text box in for each category. |
| CarryExplanation | Grantees provide a description of what the grantee will carryover and is planning on spending for the next budget period. Grantees will fill this text box in for each category. |

## Budget Implications

This table describes the data elements Grantees view and interact with when completing the budget implications section of the APR.

|  |  |
| --- | --- |
| **Field** | **Description** |
| ApprovedBudgetId | Unique system identifier for the approved budget record. |
| PreviousGrantExpenditures | Total grant expenditures from the previous budget period. |
| TotalGrantExpenditures | Total grant expenditures for the current budget period. |
| ProjectDescription | Text box question Grantees enter to describe the grantee’s ability to carry out the project as proposed for the next budget period. |
| CarryOverDescription | Text box question Grantees enter to explain any significant carryover anticipated for the next budget period. |
| ProjectScopeChanges | Yes/No question Grantees enter for anticipated changes to the project scope for the next budget period not described elsewhere in the APR. |
| AnticipatedCarryOver | Yes/No question Grantees enter if there are anticipated changes to the budget for the next budget period. |
| IfYesResponse | If Grantees select Yes to ProjectScopeChanges or AnticipatedCarryOver, they are prompted to provide an explanation. |

## Technical Assistance and Support From CSP

This table describes the data elements Grantees view and interact with when completing the TA assistance section of the APR.

|  |  |
| --- | --- |
| **Field** | **Description** |
| TASupportResponse | Text box question Grantees enter to identify any areas where Grantees require Technical Assistance. |