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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2 Data Introduction
2.1 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.

2.2 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.

3 Data Workflow/Architecture

3.1 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).
   a. 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.
    a. 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.

3.2 Data Architecture

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

3.3 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.
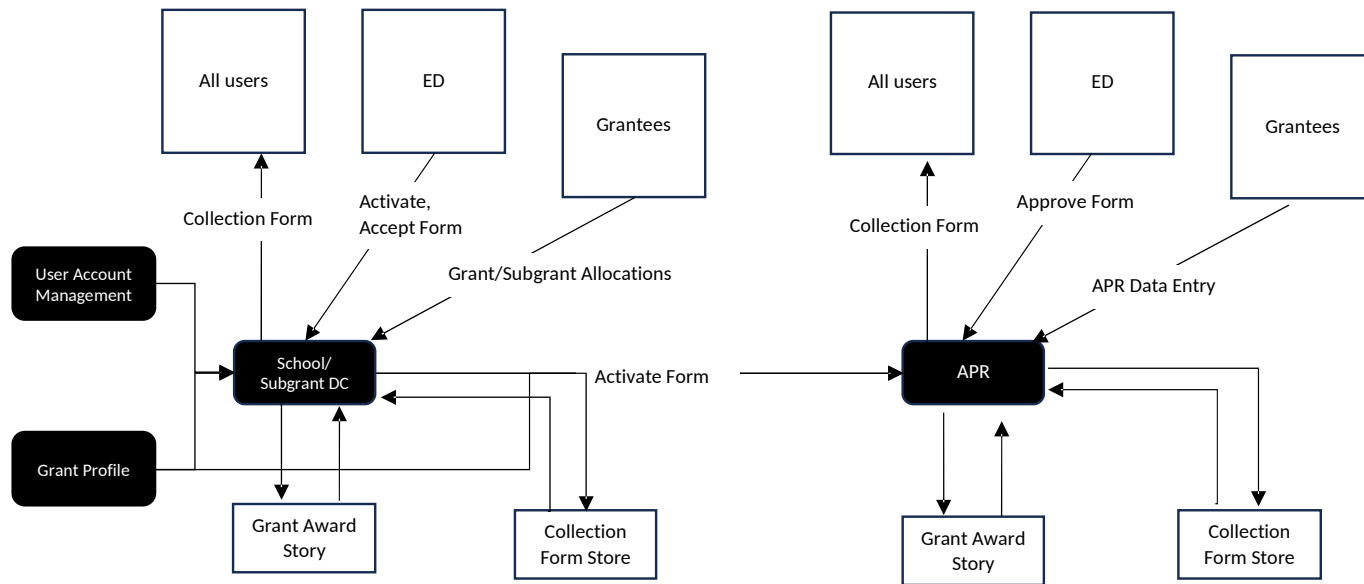
4 School/Subgrant Collection
4.1 Overview

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).

4.2 Data Dictionary

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

4.2.1 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: i. Not Available for Reporting ii. New iii. Open For Submission iv. Draft Submitted v. Reopened for Revisions vi. Initial Review Complete vii. Complete
GrantAwardId	Unique Identifier for the Grantee's award.
LastModifiedDateUtc	Data the form/module was last modified.

4.2.2 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.

4.2.3 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.

4.2.4 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.

4.2.5 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.

4.2.6 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.

4.2.7 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.

4.2.8 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.

4.2.9 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.

5 APR Collection

5.1 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

5.2 Data Dictionary

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

5.2.1 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

5.3 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.

5.4 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.

5.5 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.

5.6 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.

5.7 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.

5.8 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.

5.9 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.

5.10 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.

5.11 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.

5.12 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.

5.13 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.

5.14 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.

5.15 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."

5.16 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.

5.17 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.

5.18 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.

5.19 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)".

5.20 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.

5.21 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. |

5.22 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.