



## NEW YORK STATE EDUCATION DEPARTMENT Charter School Office

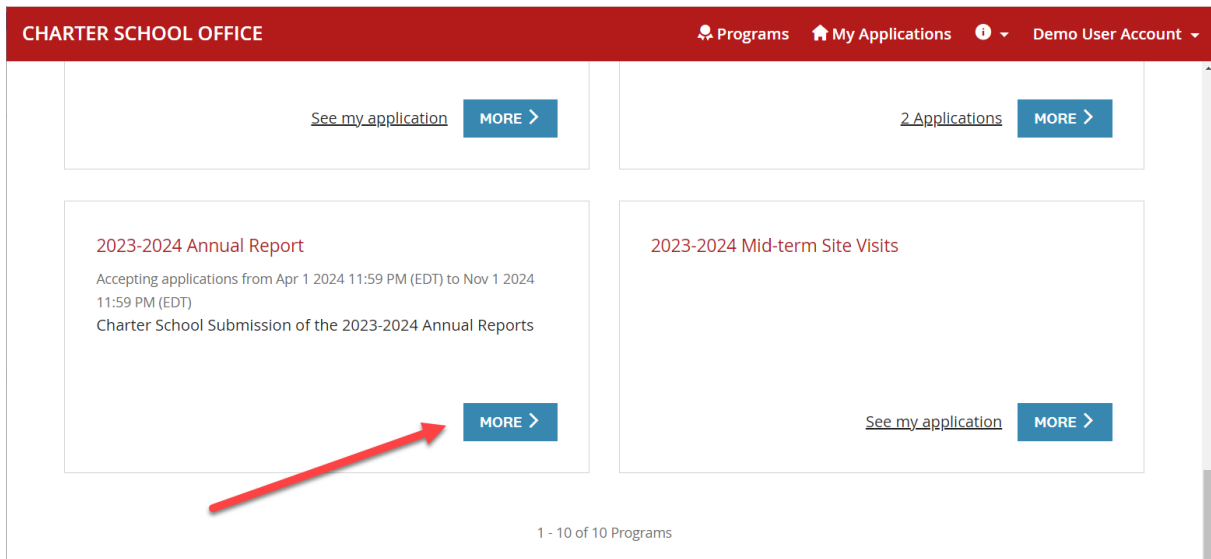
### How to Submit the Charter School Annual Report Application

**Annual Report Guidelines:** Before starting your annual report application on the portal, please review the annual report guidelines on our website at: [Charter Schools Annual Reports](#). Once you are ready to start your application, follow the steps below:

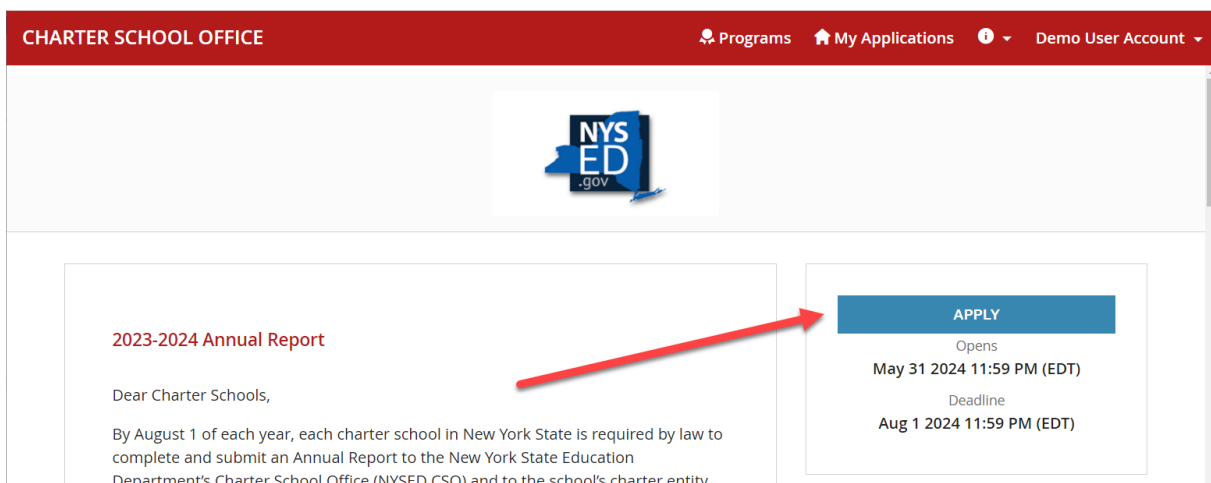
1. Log in to the Charter School Office portal at <https://nysed-cso.smapply.io/prog/>

On the applications dashboard click on the **Programs** link in the top menu bar:

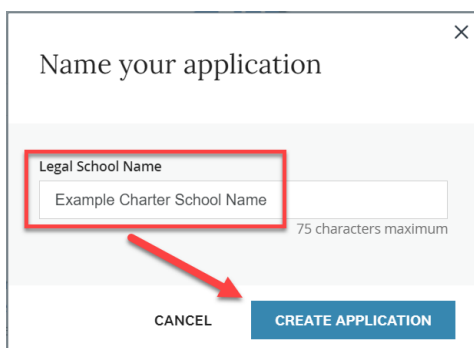
2. Scroll down to the **2023-2024 Annual Report** option and click the **More >** button:



3. Click the **Apply** button to start the application:



4. Enter your school's legal and click **Create Application**:



Please only create one annual report application per school!

5. **Add Collaborators:** If collaborators are needed to assist with completing the application, click the **ADD** button next to “Collaborators” and enter their email address. **Keep in mind that only the original application owner can do the final SUBMIT button on the application. If you work with collaborators the application owner must submit the application to ensure that it is completed and returned to the NYSED Charter School Office by the deadline.**

The screenshot shows the 'CHARTER SCHOOL OFFICE' header with navigation links for Programs, My Applications, and Demo User Account. The main content area is divided into two columns. The left column displays progress information: '0 of 10 required tasks complete', 'Last edited: Jun 16 2024 12:48 AM (EDT)', and a 'Deadline: Nov 1 2024 11:59 PM (EDT)'. It includes 'REVIEW' and 'SUBMIT' buttons and a user profile for 'Demo User (Owner)' with the email 'demo.user@nysed.gov'. Below the profile is a red-bordered box containing the 'Add collaborator' button, which is pointed to by a red arrow. The right column shows the '2023-2024 Annual Report' with ID '0000000011' and status 'Annual Report Submission'. It has tabs for 'APPLICATION' and 'ACTIVITY'. Below this is a 'Your tasks' section with a list of four tasks: 'Entry 1 - School Information and Cover Page', 'Entry 2 - Links to Critical Documents on School Website', 'Entry 3 - Board of Trustees Disclosure of Financial Interest Form', and 'Entry 4 - Board of Trustees Membership Table'. Each task has a right-pointing arrow.

6. **IMPORTANT: Complete the Entry 1 School Info and Cover Page task before editing or completing other tasks! Click on the title of the task to begin editing:**

This screenshot is similar to the previous one, showing the same application interface. However, in the 'Your tasks' section, the first task, 'Entry 1 - School Information and Cover Page', is highlighted with a red rectangular box. A red arrow points from the 'Add collaborator' button in the left column to this highlighted task. The rest of the interface, including the progress bar, user profile, and other tasks, remains the same.

After entering the required information for the Entry 1 School Info and Cover Page task, scroll to the bottom of the page and click **MARK AS COMPLETE**:

The screenshot shows the 'CHARTER SCHOOL OFFICE' header with navigation links for Programs, My Applications, and Demo User Account. The main content area displays a 'Date' field with 'May 24 2024' and a 'Thank you.' message with an apple icon. At the bottom, there are three buttons: 'PREVIOUS', 'SAVE & CONTINUE EDITING', and 'MARK AS COMPLETE'. A red arrow points to the 'MARK AS COMPLETE' button. The footer includes 'POWERED BY Apply' and 'Copyright © SurveyMonkey | Privacy | Terms'.

7. **Complete Required Tasks:** Complete the remaining required tasks and any additional optional tasks, which may be completed in any order:

The screenshot shows the 'CHARTER SCHOOL OFFICE' header with navigation links for Programs, My Applications, and Demo User. The main content area is divided into two columns. The left column shows a progress bar for '1 of 10 required tasks complete', a 'Last edited' timestamp, 'REVIEW' and 'SUBMIT' buttons, a deadline, and user information for 'Demo User (Owner)'. The right column shows the '2023-2024 Annual Report' with a preview link, an ID, and a status. Below this is the 'Your tasks' section with a list of five tasks. The first task, 'Entry 1 - School Information and Cover Page', is marked as completed with a green checkmark. The other four tasks are marked as incomplete with dashed circles. A red arrow points to the first incomplete task, 'Entry 2 - Links to Critical Documents on School Website'. The footer includes 'POWERED BY Apply' and 'Copyright © SurveyMonkey | Privacy | Terms'.

Your tasks		Instructions
✓	Entry 1 - School Information and Cover Page Completed on: Jun 18 2024 10:51 AM (EDT)	>
○	Entry 2 - Links to Critical Documents on School Website	>
○	Entry 3 - Board of Trustees Disclosure of Financial Interest Form	>
○	Entry 4 - Board of Trustees Membership Table	>
○	Entry 5 - Board Meeting Minutes	>







## Complete Required Tasks (Continued)

The status of each task is indicated by three different icons as follows:

**Gray circle** – the task has not been started yet.

**Green half circle** – task has been started but either not completed or not marked as complete.

**Green circle with checkmark** – the task is completed and marked as complete.

	 Entry 5 – Fiscal Year 2024-2025 Budget (optional) >
	 Entry 6 – Board of Trustees Disclosure of Financial Interest Form Completed on: May 24 2024 02:19 PM (EDT) >
	 Entry 7 BOT Membership Table Last edited: May 24 2024 02:22 PM (EDT) >

If you have completed a task or uploaded a file for a task, but it's still showing as in progress go back into the task and ensure that all required questions are answered and then click **MARK AS COMPLETE** to submit it:



CHARTER SCHOOL OFFICE



Programs My Applications Demo User



< Back to application



2023-2024 Annual Report  
0000000012  
ID: 0000000012 | Status: Annual Report Submission



table



  Entry 5 – Board Meeting Minutes >

  Entry 6 – Enrollment & Retention

  Entry 7 – Employee Fingerprint Requirements Attestation



  Entry 8 – Organization Chart

  Entry 9 – School Calendar

  Entry 10 – Faculty/Staff

1 of 10 required tasks complete


Last edited: Jun 18 2024 11:10 AM (EDT)

  Entry 5 – Board Meeting Minutes ...

Task instructions [Hide](#)


[Instructions](#) - Required of Regents, NYCDOE, and Buffalo BOE Authorized Schools ONLY

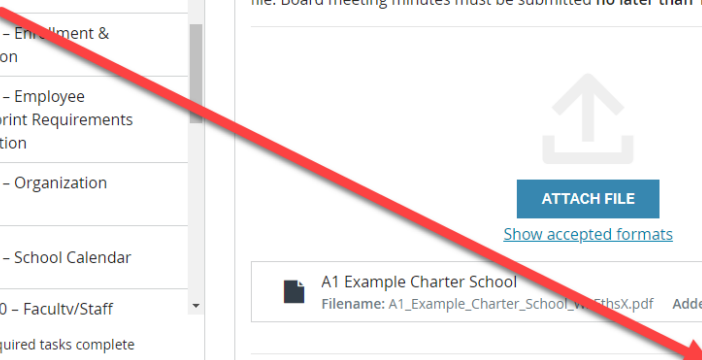
Schools must upload a complete set of final monthly board meeting minutes (July 2023-June 2024), which should match the number of meetings held during the 2023-2024 school year, as indicated in the above table. The minutes provided must be the final version approved by the school's Board of Trustees and may be uploaded individually or as one single combined file. Board meeting minutes must be submitted **no later than 11:59 PM on August 1, 2024.**



ATTACH FILE

[Show accepted formats](#)

 A1 Example Charter School  
Filename: A1\_Example\_Charter\_School\_V...thsX.pdf Added: Jun 18 2024 ...



MARK AS COMPLETE

8. **Final Submission:** Once all required tasks are completed and have checkmarks, the application owner (not a collaborator) must click the **SUBMIT** button to return the application to the NYSED Charter School Office by the deadline. The submit button will only be activated once all required tasks are completed:

The screenshot displays the 'CHARTER SCHOOL OFFICE' portal interface. On the left, a sidebar lists five tasks, each with a green checkmark and a red box highlighting the entire list: 'Entry 1 – School Information and Cover Page', 'Entry 2 – Links to Critical Documents on School Website', 'Entry 3 – Board of Trustees Disclosure of Financial Interest Form', 'Entry 4 – Board of Trustees Membership Table', and 'Entry 5 – Board Meeting Minutes'. Below this list, a progress bar shows '10 of 10 required tasks complete'. The main content area on the right contains instructions about submitting board meeting minutes by August 1, 2024, and a file upload section showing a file named 'A1\_Example\_Charter\_School\_WxEthsX.pdf' added on June 18, 2024. At the bottom, there are 'REVIEW' and 'SUBMIT' buttons. A red arrow points from the 'SUBMIT' button towards the bottom right of the page.

### Additional Resources

The annual report guidelines and additional information on how to submit the charter school annual report is available on our website at: [Charter Schools Annual Reports](#)

If you need further assistance or technical support with the Charter School Office Portal, please email us at [CharterSchools@nysed.gov](mailto:CharterSchools@nysed.gov), and include **Annual Report** in the email's subject line.