

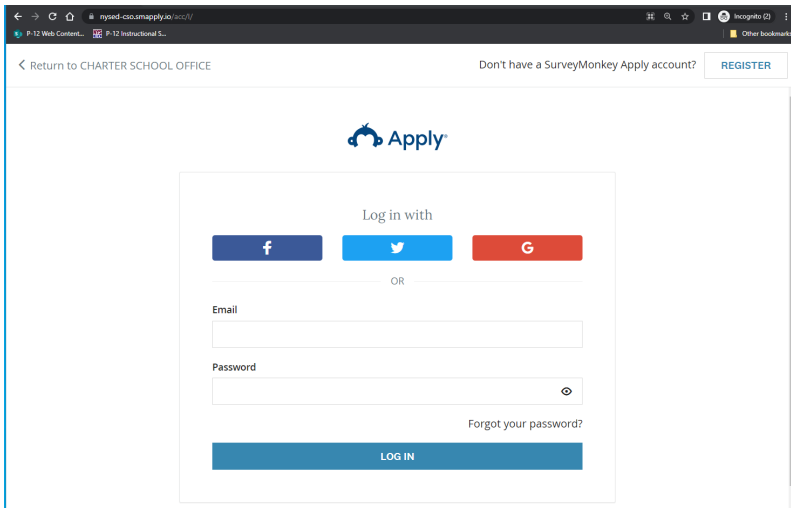


NEW YORK STATE EDUCATION DEPARTMENT Charter School Office

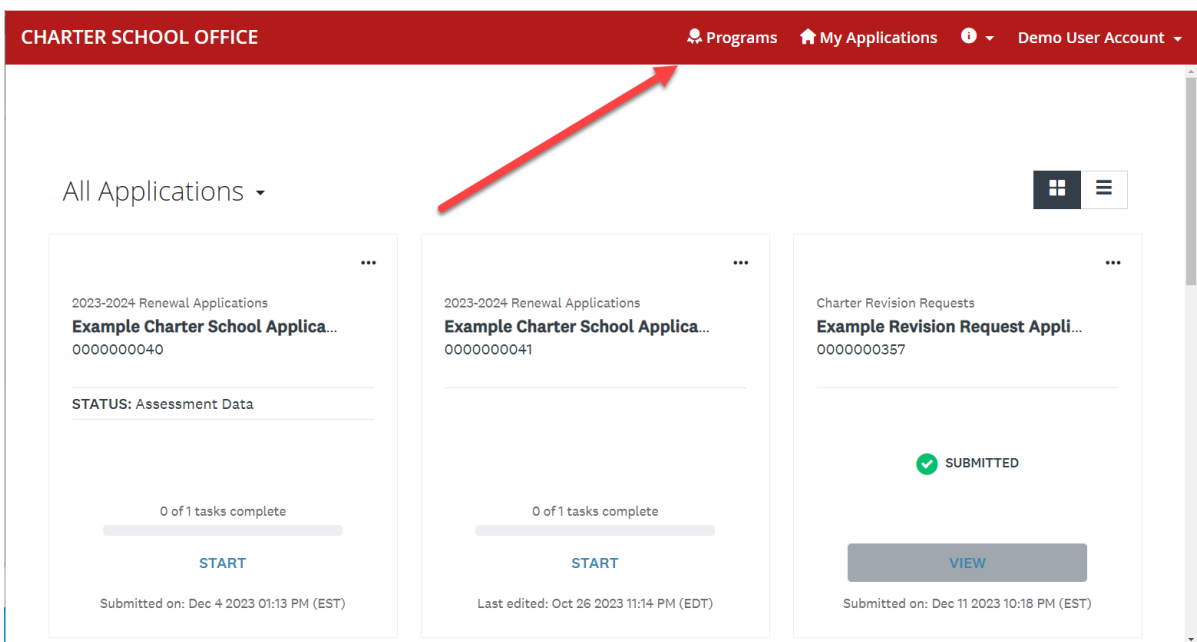
How to Submit the Charter School Annual Report Application

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:

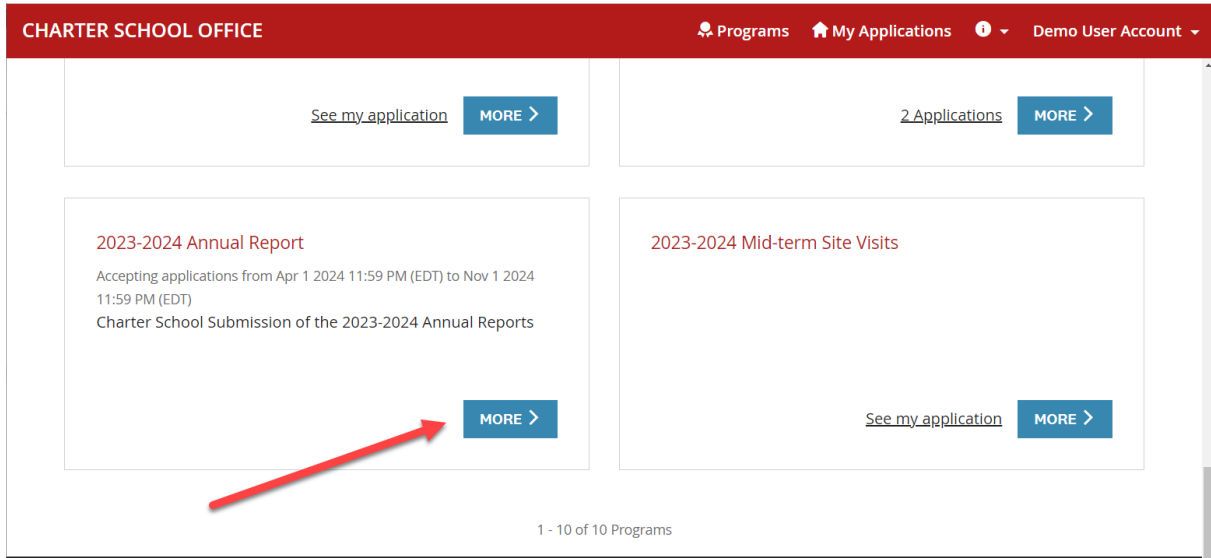
1. Log in to the Charter School Office portal at <https://nysed-cso.smapply.io/prog/>



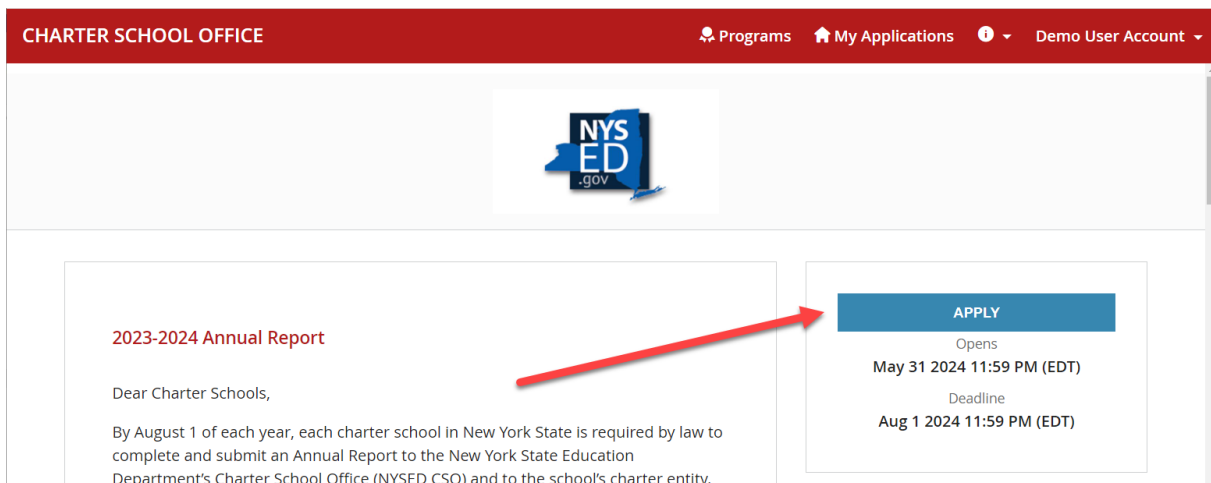
On the applications dashboard click on the **Programs** link in the top menu bar:



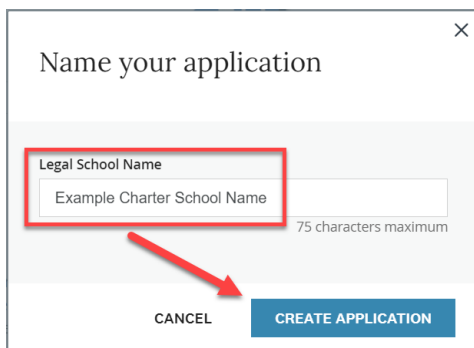
2. Scroll down to the **2023-2024 Annual Report** option and click the **More >** button:



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!

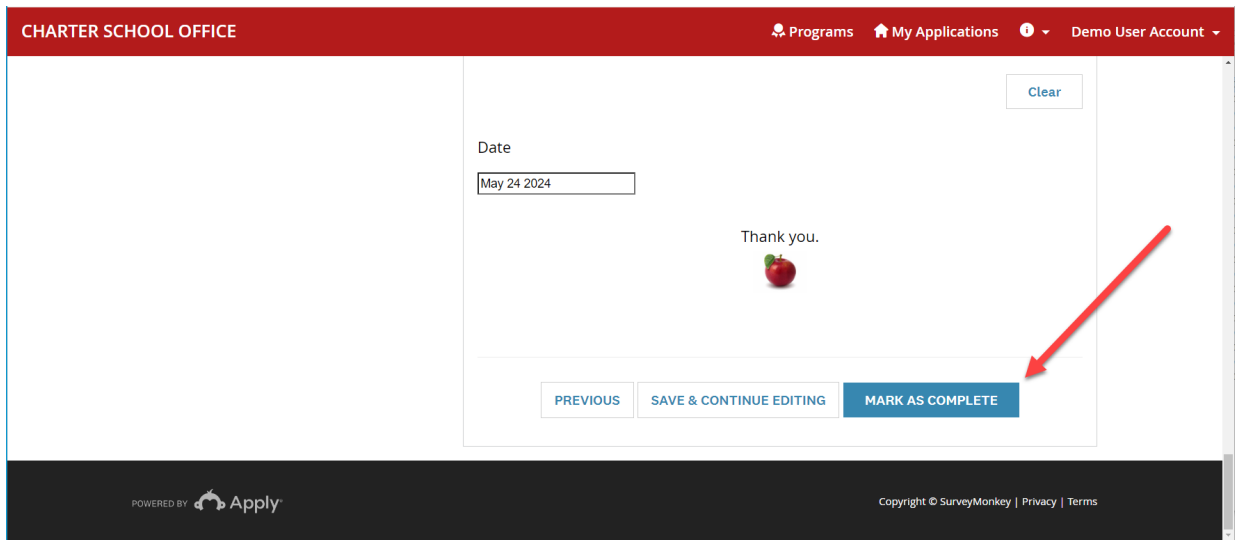
5. **Add Collaborators:** If collaborators are needed to assist with completing the application, click the **ADD** button next to “Collaborators” and enter their email address. **Keep in mind that only the original application owner can do the final SUBMIT button on the application. If you work with 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)', 'REVIEW' and 'SUBMIT' buttons, and 'Deadline: Nov 1 2024 11:59 PM (EDT)'. Below this is the user profile for 'Demo User (Owner)' with email 'demo.user@nysed.gov' and an 'Add collaborator' button highlighted by a red box. A red arrow points from this button towards the right column. The right column shows the application details for '2023-2024 Annual Report' with ID '0000000011' and status 'Annual Report Submission'. It includes tabs for 'APPLICATION' and 'ACTIVITY', and a 'Your tasks' list with four entries: '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 entry has a right-pointing arrow.

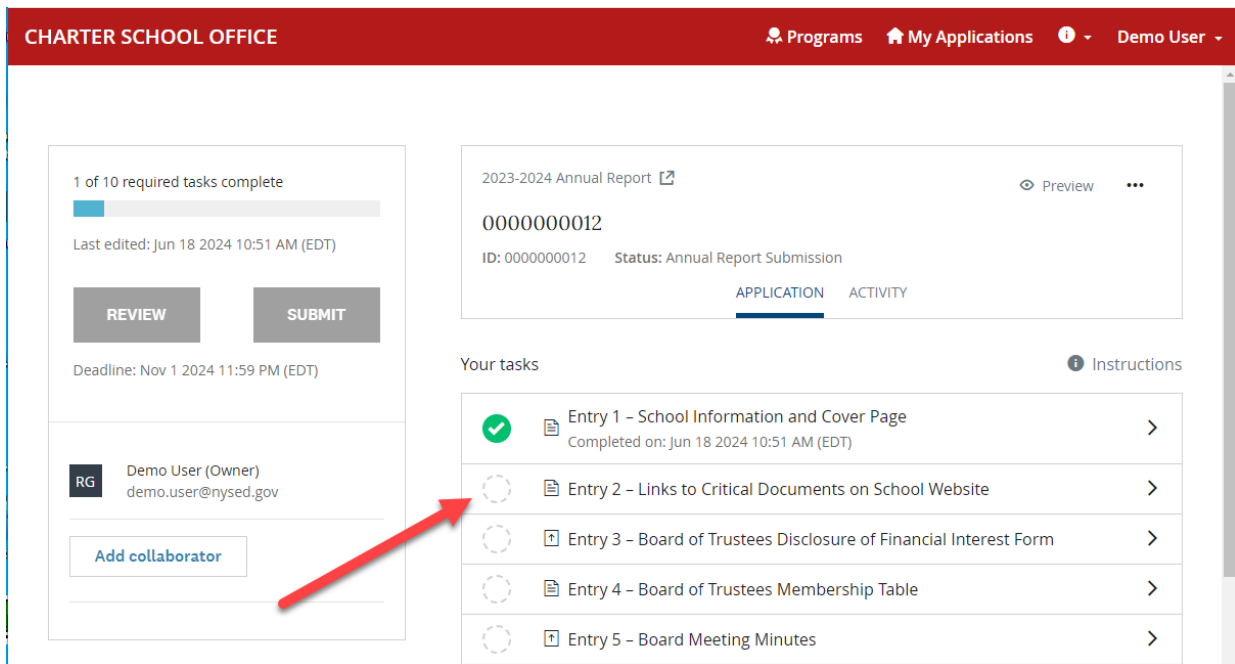
6. **IMPORTANT: Complete the Entry 1 School Info and Cover Page task before editing or completing other tasks! Click on the title of the task to begin editing:**

This screenshot is similar to the one above, showing the same application interface. In this view, the 'Add collaborator' button is no longer highlighted. Instead, the first task in the 'Your tasks' list, 'Entry 1 - School Information and Cover Page', is highlighted with a red box. A red arrow points from the bottom left towards this task title. The rest of the interface, including the progress bar, application details, and other tasks, remains the same as in the previous screenshot.

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**:



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









Complete Required Tasks (Continued)

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

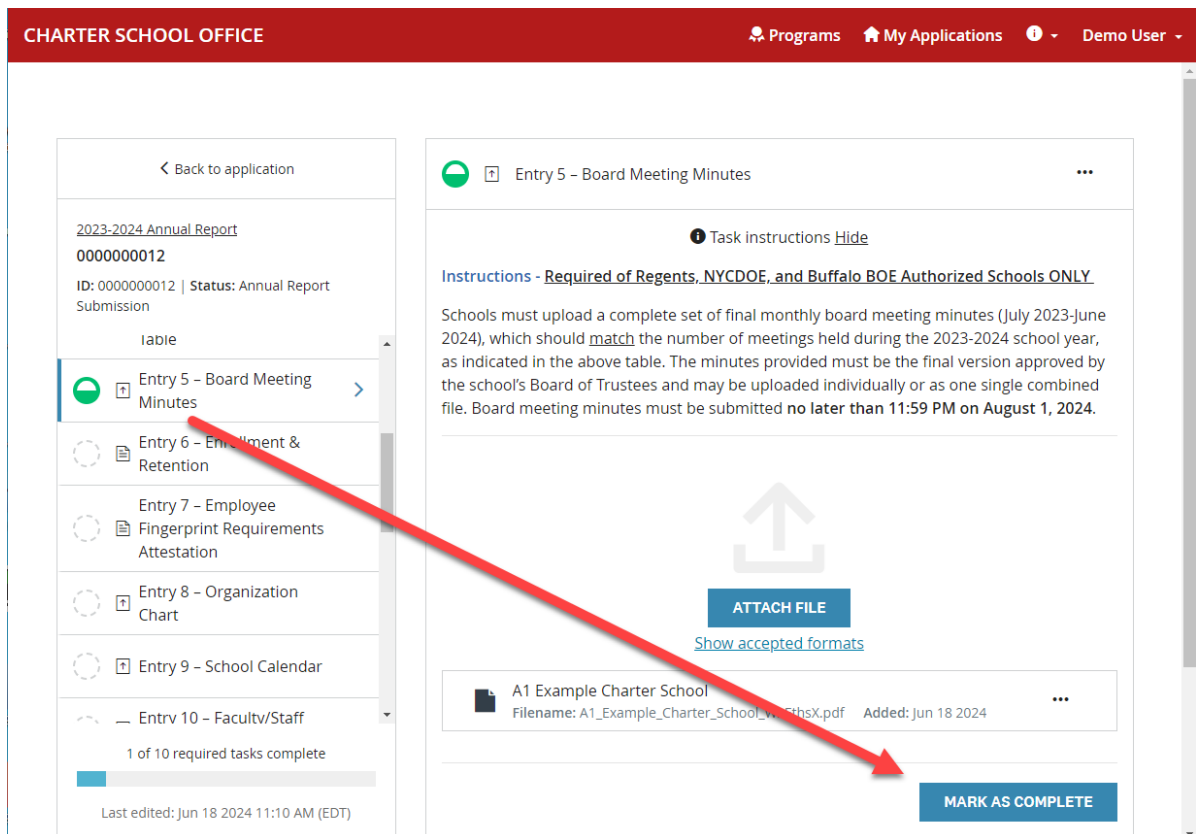
Gray circle – the task has not been started yet.

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:



The screenshot shows the Charter School Office application interface. The top navigation bar includes "CHARTER SCHOOL OFFICE", "Programs", "My Applications", and "Demo User". The main content area is divided into a left sidebar and a right main panel.

Left Sidebar: Displays a list of tasks for the "2023-2024 Annual Report" (ID: 0000000012). The tasks are:

- Entry 5 – Board Meeting Minutes (Green circle with checkmark icon)
- Entry 6 – Enrollment & Retention (Gray circle icon)
- Entry 7 – Employee Fingerprint Requirements Attestation (Gray circle icon)
- Entry 8 – Organization Chart (Gray circle icon)
- Entry 9 – School Calendar (Gray circle icon)
- Entry 10 – Faculty/Staff (Gray circle icon)

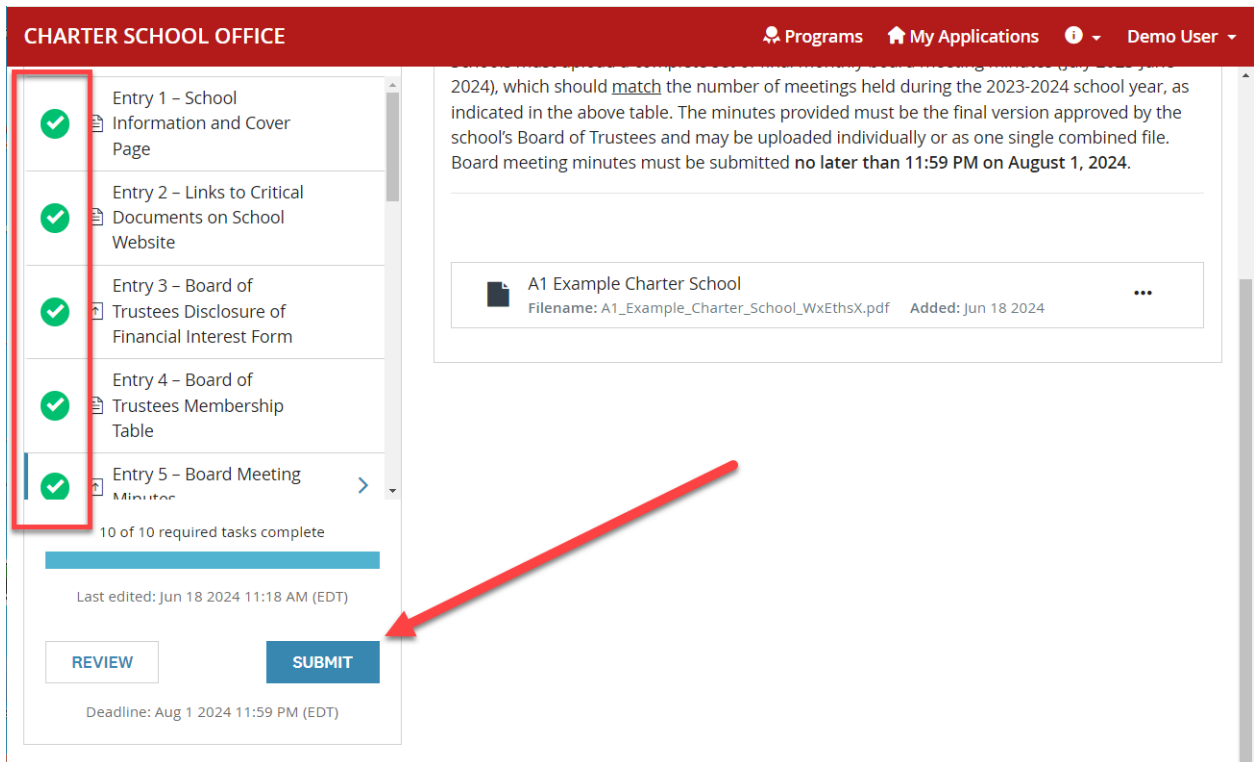
A progress bar at the bottom of the sidebar indicates "1 of 10 required tasks complete".

Right Main Panel: Displays the details for "Entry 5 – Board Meeting Minutes". It includes:

- Task instructions: "Required of Regents, NYCDOE, and Buffalo BOE Authorized Schools ONLY".
- Instructions: "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."
- An "ATTACH FILE" button with a "Show accepted formats" link below it.
- A file upload record: "A1 Example Charter School" with filename "A1_Example_Charter_School_MinutesX.pdf" and "Added: Jun 18 2024".
- A "MARK AS COMPLETE" button at the bottom right.

A red arrow points from the "Entry 5 – Board Meeting Minutes" task in the sidebar to the "MARK AS COMPLETE" button in the main panel.

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:



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, and include **Annual Report** in the email's subject line.