

## Step one:

## Sign-in to the Charter School Office Portal

The screenshot shows the Charter School Office Portal in Internet Explorer. The browser title is "CHARTER SCHOOL OFFICE - Windows Internet Explorer provided by NYS Education Department". The address bar shows "https://nysed-cso.myreviewroom.com/". The page header includes the NYSED logo and "CHARTER SCHOOL OFFICE Online Portal for Proposed & Existing Schools".

**Welcome to the Charter School Office Portal!**

For Applicants Proposing to Start a Charter School. Upon sign-in, you as a new applicant will be directed to a set of required tasks associated with the submission of a **Letter of Intent to Apply** for Round 2 of the 2012 Request for Proposals (RFP). Specifically, you will complete the following tasks:

1. Fill in the "Letter of Intent Applicant and Media Contact Form"
2. Upload your 5 page "Letter of Intent to Apply--Narrative Sections I-IV" as outlined on pages 16 and 17 of the 2012 Charter School Application Kit at <http://www.p12.nysed.gov/psostartcharter.html>
3. Click "Submit" by **5:00 p.m. on June 25, 2012.**

For Leaders of Existing Charter Schools. Charter schools that served students in 2011-2012 will use this portal to submit your charter school's **2011-12 Annual Report** to SED, which is due August 1st. You will complete the following tasks associated with the submission of an Annual Charter School Report for your charter school:

1. Fill in the "Annual Report Contact Form"
2. Upload your Annual Report in accordance with guidelines posted on the web page at <http://www.p12.nysed.gov/psor/>
3. Click "Submit" by **5:00 p.m. on August 1, 2012**

If you are looking for guidance material, please click on "Resources" at the top of your page. You may also access these resources from the web at <http://www.p12.nysed.gov/psor/>

Thank you for your commitment to developing and sustaining high quality charter schools in New York State.

Charter School Office  
charterschools@mail.nysed.gov

**Sign In**

Email:

Password:

[Trouble Signing In?](#)

**Need An Account?**

A black arrow points from the "Sign Up" button to the "Need An Account?" section.

### Instructions for Log in Screen

1. First time users log-in here. \_\_\_\_\_
2. If you have an account, enter your e-mail and password.

## Step two:

### Locate Instructions

Instructions are given for each task. The tasks are:

- Complete cover page and upload Annual Report
- Upload Progress Towards Goals
- Upload Audited Financial Statements (AFS)
- Upload Management Letter (ML), if applicable
- Upload Corrective Action Plan for ML, if applicable
- Upload Single Audit Report, if required
- Upload Extraclassroom Activity Fund, if applicable

Each task has a link. Open the link to complete a task.

Next to this link it says 'incomplete'. Once an item is submitted it will change to 'complete.'

The screenshot shows the NYSED Charter School Office online portal. The page title is "TEST-SUBMISSION (25-556599214)". The submission is in the "Submit Annual Reports and Financials" stage with a status of "Active". It is a test submission created automatically for the user "Test User".

**Submit Annual Reports and Financials**

**INSTRUCTIONS**

Please read through the 2011-12 Annual Report Guidelines for guidance. Guidelines are available to you via the 'Resources' tab at the top right of this page or at <http://www.p12.nysed.gov/p12/2011-2012AnnualReportPage.html>.

Annual reports must be submitted to SED's Charter School Office via this portal and to the school's authorizing charter entity by **5:00 pm Wednesday, August 1, 2012**. Please do not submit a hard copy.

In addition, charter schools that are authorized by a charter entity other than the NYS Board of Regents must also email a PDF version of the Annual Report to the appropriate email address below. The subject of the email should be: 2011-12 Annual Report: [insert name of school]

For charter schools authorized by:

- State University of New York Trustees: [charters@sunys.edu](mailto:charters@sunys.edu)
- New York City Department of Education's Chancellor: [charterschools@schools.nyc.gov](mailto:charterschools@schools.nyc.gov)
- Buffalo Board of Education: [gsullen@buffalocharterschools.org](mailto:gsullen@buffalocharterschools.org)

Thank you,  
Charter School Office  
[charterschools@mail.nysed.gov](mailto:charterschools@mail.nysed.gov)

Task	Actions	Status	Deadline
<a href="#">Complete Cover Page and Upload Annual Report</a>		Incomplete	

Instructions

### Step three:

Open a link to one of the tasks.

Here we open the link for the Cover Page and Annual Report. Complete the form as instructed.

The screenshot shows a web browser window titled "Complete Cover Page and Upload Annual Report - Windows Internet Explorer provided by NYS Education Department". The address bar shows the URL: <https://nysed-cso.myreviewroom.com/s/53590/12913/e/>. The browser's address bar and menu bar are visible. The page content includes a header for the "CHARTER SCHOOL OFFICE" with the NYSED.gov logo and the text "Online Portal for Proposed & Existing Schools". There are links for "Resources", "Settings", "Help", and "Back to Submission". The main section is titled "School Information and Cover Page" and contains a form for the "2011-2012 ANNUAL REPORT COVER PAGE". The form fields include: "School Name and BEDS Code" (dropdown), "Charter Authorizer:" (dropdown), "Board of Trustees Chair:" (text input), "School Leader:" (text input), "District/CSO of Location" (dropdown), "School Address/Phone and Fax Numbers" (table with columns for Primary Address, Phone Number, Fax Number, and Email Address), "School Website (URL format)" (text input), and "Date School First Opened for instruction:" (text input with a YYYYMMDD format hint). The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock displaying 4:47 PM.

Complete Cover Page and Upload Annual Report - Windows Internet Explorer provided by NYS Education Department

<https://nysed-cso.myreviewroom.com/s/53590/12913/e/>

File Edit View Favorites Tools Help

CHARTER SCHOOL OFFI... Complete Cover Pag... X

Dashboard Style Home Susan Dufour

Resources Settings Help

Back to Submission

**NYSED.gov** CHARTER SCHOOL OFFICE  
Online Portal for Proposed & Existing Schools

School Information and Cover Page

2011-2012 ANNUAL REPORT COVER PAGE

School Name and BEDS Code  
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Charter Authorizer:  
--

Board of Trustees Chair:  
--

School Leader:  
--

District/CSO of Location  
--

School Address/Phone and Fax Numbers

Primary Address	Phone Number	Fax Number	Email Address
--	--	--	--

School Website (URL format)  
--

Date School First Opened for instruction:  
YYYYMMDD

The Cover page continues....

## Cover Page, continued

Browse here to locate your Annual Report in this upload area.

Complete Cover Page and Upload Annual Report - Windows Internet Explorer provided by NYS Education Department

https://nysed-cso.myreviewroom.com/s/53590/12913/e/

File Edit View Favorites Tools Help

CHARTER SCHOOL OFFI... Complete Cover Pag...

Dashboard Style Home Susan Dufour

District/CSD of Location

School Address/Phone and Fax Numbers

Primary Address	Phone Number	Fax Number	Email Address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

School Website (URL format)

Date School First Opened for instruction:

2011-2012 Enrollment:

2011-2012 Grades Served:

Check all that apply.

	K	1	2	3	4	5	6	7	8	9	10	11	12	ungraded
Grades Served	<input type="checkbox"/>													

Please upload a completed and signed 2011-12 Annual Report for your charter school.

Thank you for your submission.

Online Application Reviews powered by ReviewRoom 4.0 (32) © 2012 Online Survey Software powered by EdSurvey

start Novell GroupWise ... Complete Cover P... log in register inst... Day 4:47 PM

Then submit.

After completing each task you will receive an e-mail that says:

‘Thank you. We have received your submission to NYSED Charter School Office’

### Step three:

### Open Another Link

Here we show links for 'Progress Towards Goals' and for Audited Financial Statements.

Open the link

Note whether task is complete, or incomplete.

The screenshot shows a web browser window titled "CHARTER SCHOOL OFFICE - Windows Internet Explorer provided by NYS Education Department". The address bar shows the URL "https://nysed-cso.myreviewroom.com/s/53590/". The browser's address bar and menu bar are visible. The main content area displays two submission items:

- Progress Towards Goals:** Status: Incomplete. Date: 11/01/2012 05:00:00 PM EDT. Below this is a section titled "Instructions" with detailed text regarding the submission of 2011-2012 NYS state assessment data and charter goals.
- Audited Financial Statements (AFS):** Status: Incomplete. Date: 11/01/2012 05:00:00 PM EDT. Below this is another "Instructions" section detailing the requirements for independent financial audits, including the deadline of November 1, 2012, and the need to submit reports to SED's Charter School Office.

Arrows from the text "Open the link" point to the underlined links for "Progress Towards Goals" and "Audited Financial Statements (AFS)". An arrow from the text "Note whether task is complete, or incomplete." points to the "Incomplete" status text for both items.

Read instructions and open link for each of the tasks you are required to submit.

## Step four:

### Upload 'Progress Toward Goals

The screenshot shows a web browser window displaying the CHARTER SCHOOL OFFICE website. The page title is "CHARTER SCHOOL OFFICE - Windows Internet Explorer provided by NYS Education Department". The URL is "https://nysed-cso.myreviewroom.com/s/53590/13117/e/". The website header includes the NYS Education Department logo and the text "CHARTER SCHOOL OFFICE Progress Towards Goals". A "Back to Submission" button is visible. The main content area contains a form with the following elements:

- Title:** A text input field.
- Document:** A text input field and a "Browse..." button.
- Submit:** A button.

To the right of the form is a "File Types Supported" section with the following list:

- PDF (preferred)
- Microsoft Office (.doc, .ppt, .xls)
- Microsoft Office 2007 & 2010: Supported but **not recommended** (.docx, .pptx, .xlsx)
- Open Office (.odt, .ott)
- Images (.jpg, .gif, .png)
- Other Formats (.html, .xhtml, .txt, .rtf, .latex)

Below the list, a note states: "Please note that .docx, .ppt, and .xls formats are not entirely supported. Please save your file types as .doc, .ppt or .xls respectively before uploading."

At the bottom of the page, there are two small text links: "Online Application Review powered by ReviewPoint 4.2 (S) © 2012" and "Online Survey Software powered by FluidSurveys".

### Instructions to Upload 'Progress Toward Goals

1. Enter '2011-2012 Progress Toward Charter Goals- [insert name of school].
2. Click browse, locate then select the document within your computer files.
3. Click submit button

Upload other tasks in the same manner.