



Consolidated Financial Reporting System Charter School Redirection (CFRS-CSR)

Charter School User Manual

1. Overview of CFRS-CSR and System Requirements

The Consolidated Financial Reporting System (CFRS) is used by Commonwealth local educational agencies (LEAs) as the required method of completing and submitting various financial reporting, including a module (CSR) for charter schools to submit subsidy redirection requests to PDE and for school districts to file formal objections to PDE after a subsidy redirection has occurred.

CSR utilizes an existing, easy-to-use interface (CFRS) that makes data entry and submission of redirection requests simple and efficient.

Web Browser Compatibility

CFRS is supported by newer web browsers. Users with browser versions less than the following should consider upgrading to ensure maximum application stability and operability.

- IE 10 SP3 and above
- Chrome 37 and above
- Firefox 32 and above
- Opera 31 and above

2. Accessing and Updating CFRS-CSR

The screenshots on the following pages provide the linear progression of data entry and submission for redirection requests in CFRS-CSR.

First, users must log in to CFRS. There are two options for accessing PDE portal applications:

- a. Directly on the MyPDESuite Application page: <https://www.mypdeapps.pa.gov>
or
- b. Via PDE homepage: <https://www.education.pa.gov>

Directly below the large picture, one of the five blocks shows the following icon:



MyPDESuite Application Login Screen

Welcome to the application login screen to access your personalized account.

If you are a citizen and have an existing account, enter your Username and Password. If you are a Commonwealth employee, please insert the appropriate domain name in front of your username (example: **cwopalusername**).

Username:

Password:

If you are a citizen and do not have an account, please click on the Register link to register for a new account.

[Register](#) | [Forgot Password](#) | [Profile](#)

After logging in to CFRS, the landing page will be the first screen displayed.

Charter School view

Document Type		Last 2 years' filing statuses:			
AFR	Annual Financial Report <small>ra-SchlFin@pa.gov, tskorka@pa.gov ra-cfrs@pa.gov, tskorka@pa.gov</small>	Fiscal Year	Version	Status	Date
		2020-2021	Original	Not Started	
		2019-2020	Original	OCO Approved / IC Approved	01/11/2021
CSR	Charter School Subsidy Redirection				
GFB	General Fund Budget <small>ra-GFB@pa.gov, tskorka@pa.gov ra-cfrs@pa.gov, tskorka@pa.gov</small>	Fiscal Year	Type	Version	Status
		2022-2023		Original	Not Started
		2021-2022		Original	Not Started
PDE-418/419	Charter School Lease Reimbursement Program <small>ra-edsfreimbursement@pa.gov</small>				

School District view

Document Type		Last 2 years' filing statuses:				
AFR	Annual Financial Report <small>ra-SchlFin@pa.gov, tsorka@pa.gov ra-cfrs@pa.gov, tsorka@pa.gov</small>	Fiscal Year	Version	Status	Date	
		2020-2021	Original	Not Started		
		2019-2020	Original	OCO Approved / IC Approved	12/01/2020	
CSR	Charter School Subsidy Redirection					
GFB	General Fund Budget <small>ra-GFB@pa.gov, tsorka@pa.gov ra-cfrs@pa.gov, tsorka@pa.gov</small>	Fiscal Year	Type	Version	Status	Date
		2022-2023	Final	Original	Started	09/17/2021
		2021-2022	Final	Original	Started	09/17/2021
PDE-2071	Application for Reimbursement for School Construction Project <small>ra-edsfreimbursement@pa.gov</small>					

This screen will show the status of the last two years of data submissions within CFRS.

The top navigation bar will show the latest Unipay month that is open for redirection requests:

Collections Open: GFB

AFR 2020-2021

CSR November 2021 Unipay open

When selecting CSR from the landing page, users will be directed to the CSR home page. Each page shows the left-hand navigation menu, the data-entry and submission status section (center), and the PDE review status section (center).

CSR Main Screen (charter schools only)

CFRS Consolidated Financial Reporting System
[CFRS Home](#) | [Change Role](#) | [Help & Support](#) | [Logout](#)

Home

LEA Contact Information

Submission

Previous Submissions

LEA Name: [REDACTED]

AUN: [REDACTED]

Submission: CSR November 2021 Unipay open

Select Payable Year: 2021-2022 Submission Month: October

CSR - Data Entry and Submission Status

Section Name	Status	Date
LEA Contact Information	Updated	11/16/2021 9:59:24 PM
Invoice	Data Submitted	10/20/2021 3:45:00 PM
Reconciliation	Started	10/20/2021 3:45:07 PM

CSR - PDE Review Status

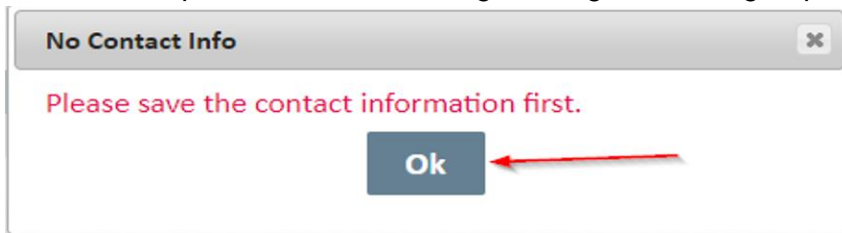
Section Name	Status	Date
Invoice	Accepted	11/9/2021 4:16:15 PM
Reconciliation	Review Not Started	

3. Data Entry - Overview and Details

a. Complete the LEA Contact Information entry screen

For each month in which the CSR process is initiated, the LEA Contact Information entry screen must be completed before additional screens become available for data entry. The information provided on this screen will ensure PDE can efficiently contact the appropriate person with any issues found with the submission.

- a) All fields marked with a red asterisk on this screen must be completed before continuing.
- b) After completing this screen, click Save (bottom of the screen). If all required fields have not been completed, an error message stating the missing required fields will display.



LEA Contact Information (Contact Information)

Contact Person:	Secondary Contact:
Title:* <input type="text" value="Mr."/>	Title: <input type="text" value="--Select--"/>
First Name:* <input type="text" value="John"/>	First Name: <input type="text"/>
Middle Initial: <input type="text"/>	Middle Initial: <input type="text"/>
Last Name:* <input type="text" value="Smith"/>	Last Name: <input type="text"/>
Suffix: <input type="text" value="--Select--"/>	Suffix: <input type="text" value="--Select--"/>
Position Title:* <input type="text" value="BM"/>	Position Title: <input type="text"/>
Email:* <input type="text" value="abc123@aol.com"/>	Email: <input type="text" value="eg. john@live.com"/>
Phone:* <input type="text" value="123-455-1111"/> Ext. <input type="text"/>	Phone: <input type="text" value="eg. 123-456-7890"/> Ext. <input type="text"/>
Last Updated: <input type="text" value="10/20/2021 by aliesposit"/>	

Save

b. Select Submissions

This selection is only for charter schools that opt to submit a redirection request to PDE.

The select payable year and submission month will default to the current payable year and the current submission month of the Unipay. LEAs can select different payable years and submission months to access the status of previously submitted invoices and/or reconciliations.



Select Payable Year:*	2021-2022 ▼	Submission Month:*	October ▼
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CSR Submission Screen

The submission screen will store the Student List, Tuition Rate, Direct Payments, and Supporting Document files.

Submission (Subsidy Redirection Submission)

1. Upload Data

Select School Year:*	--Select-- ▼	Uploaded Documents:	Notes:
Student List:*	Choose File No file chosen Student List Template	 	
Tuition Rates:*	Choose File No file chosen Tuition Rate Template		
Direct Payments:*	Choose File No file chosen SD DirectPayment Template		
Supporting Documents:*	Choose Files No file chosen		
Select Report:	Summary of Unipay Request ▼	Print PDF	Add Notes

2. Signed Document

Signed Unipay Report to Upload:* Choose File No file chosen | Only .pdf files are permitted to be uploaded. |

Request cannot be submitted until summary of unipay request is uploaded.

3. Submissions

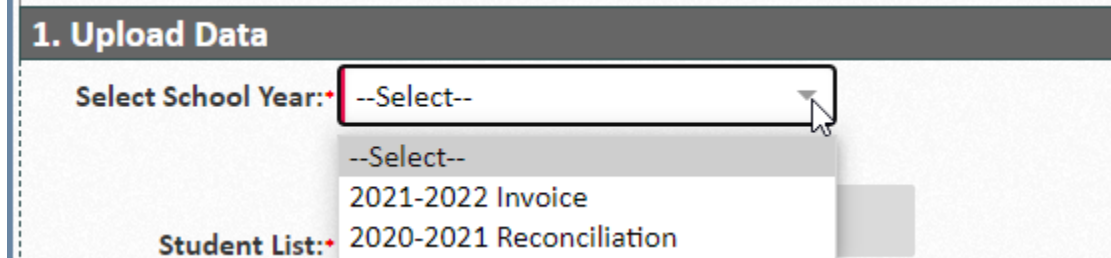
Select	School Year	Type	Submission Month	Payable Year	Status	Submitted Date	Review Status	Number of School Districts	Requested Amount	Paid Amount	Objection
No record(s) found.											

[Submit](#) [Request for Reopen](#)

Upload Data

c. Select School Year

Users should select the school year (current-year invoice or prior-year reconciliation). Files cannot be uploaded until a school year is selected.



1. Upload Data

Select School Year:

Student List:

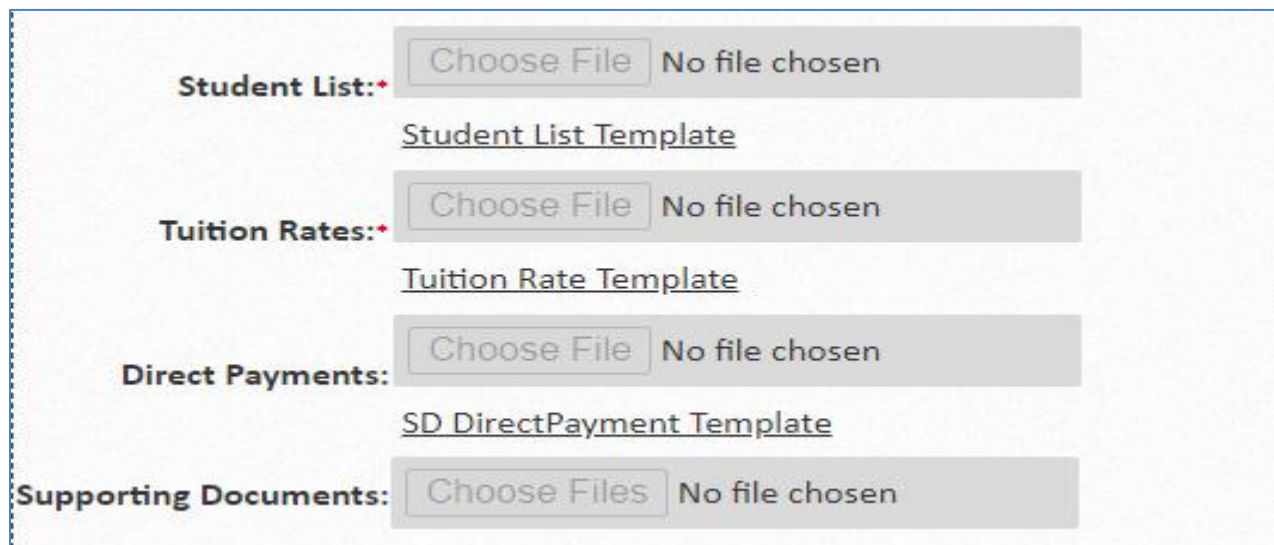
Options for Select School Year: --Select--, 2021-2022 Invoice, 2020-2021 Reconciliation

d. Upload Data Files

To properly submit a charter school subsidy redirection request to PDE, the following templates must be uploaded:

- Student List – required
- Tuition Rates – required
- Direct Payments – applicable if the charter school received direct payment(s) from or provided refunds to school district
- Supporting Documents – applicable if the charter school has additional information including school district- and/or charter school-calculated PDE-363 tuition rates

Click “Choose File” to select the appropriate file from File Explorer.



Student List: No file chosen

[Student List Template](#)

Tuition Rates: No file chosen

[Tuition Rate Template](#)

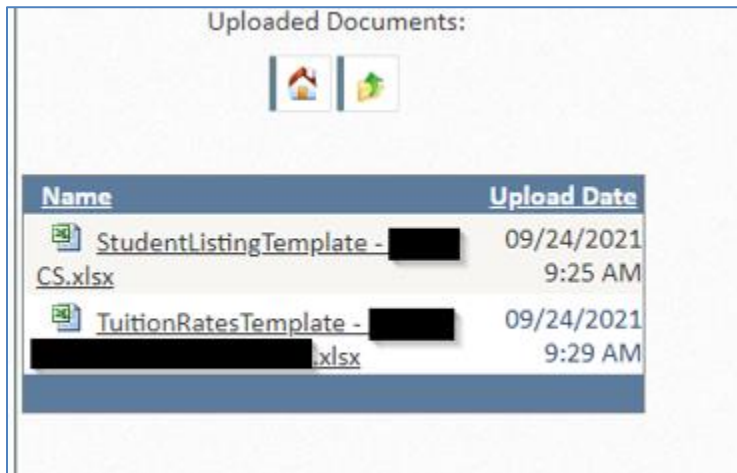
Direct Payments: No file chosen

[SD DirectPayment Template](#)



Supporting Documents: No file chosen

Note: Templates of each file type are easily accessible by clicking the hyperlink under the file selection.

After templates have been uploaded, they will appear in the “Uploaded Documents” section in the center of the page. This section includes the file name and the timestamp for the upload.



Uploaded Documents:

Name	Upload Date
 StudentListingTemplate - [REDACTED] CS.xlsx	09/24/2021 9:25 AM
 TuitionRatesTemplate - [REDACTED] .xlsx	09/24/2021 9:29 AM

The “Notes” section is available on the right side of the screen for the charter school to add any additional notes relevant to the submission, such as information related to the completion of a CS-created PDE-363.



Notes:

[Empty text input area]

Add Notes

After the required templates have been successfully uploaded:

- a) Select Summary of Unipay Request (SUR) from drop-down.
- b) Select Print PDF to download the SUR.

CFRS-CSR will automatically validate uploaded templates to determine if data are either 1) inconsistent with PDE records or 2) inconsistent with upload specifications. Inconsistencies will result in error(s). The SUR will not be available for generation until all errors are resolved.

1. Upload Data

Select School Year: 2021-2022 Invoice
Invoice for October 2021 Unipay

Student List: No file chosen
 Student List Template

Tuition Rates: No file chosen
 Tuition Rate Template

Direct Payments: No file chosen
 SD DirectPayment Template

Supporting Documents: No file chosen

Select Report: Summary of Unipay Request

Uploaded Documents:

Name	Upload Date
StudentListingTemplate - [redacted].CS.xlsx	09/24/2021 9:25 AM
TuitionRatesTemplate - [redacted].xlsx	09/24/2021 9:29 AM

Notes:

e. Upload Signed Summary of Unipay Request

- a) Choose and upload the SUR. Failure to submit a signed statement will result in the request not being processed. In addition, data cannot be submitted until the SUR file is uploaded.

2. Signed Document

Signed Unipay Report to Upload: No file chosen Only .pdf files are permitted to be uploaded

Request cannot be submitted until summary of unipay request is uploaded.

f. Select Submission

New to submission status with CFRS-CSR is the utilization of lower-screen menu indicators for completion status of submissions. These indicators are as follows:

3. Submissions	
Select	School Year
<input type="checkbox"/>	2021-2022

Indicates data entry has not been initiated.

3. Submissions	
Select	School Year
<input type="checkbox"/>	2021-2022

Indicates the Summary of Unipay Request has been uploaded.

3. Submissions	
Select	School Year
<input checked="" type="checkbox"/>	2021-2022

Indicates redirection request has been submitted to PDE.

- a.) Select the submission by checking the applicable checkbox(es).
- b.) Click the Submit button.

request cannot be submitted until summary of unipay request is approved.

3. Submissions											
Select	School Year	Type	Submission Month	Payable Year	Status	Submitted Date	Review Status	Number of School Districts	Requested Amount	Paid Amount	Objection
<input checked="" type="checkbox"/>	2021-2022	Invoice	September	2021-2022	Started			1	\$26,035.85	\$0.00	False

Submit
Request for Reopen

As noted above, green shading indicates the checked row(s) has been successfully submitted to PDE.

Failure to submit a redirection request by the deadline (25th of the month), as noted on the timeline, will result in the inability to submit the redirection request for payment in the next month's Unipay.

The Submissions section includes a summary of the submission, including both submission status and PDE review status.

4. Submitting the Invoice or Reconciliation Request

To properly submit a charter school subsidy redirection request to PDE, the following steps must be performed:

1. Upload Student List template (required), Tuition Rates template (required), and Direct Payments template (if applicable)
2. Upload the signed Summary of Unipay Request
3. Click "Submit"

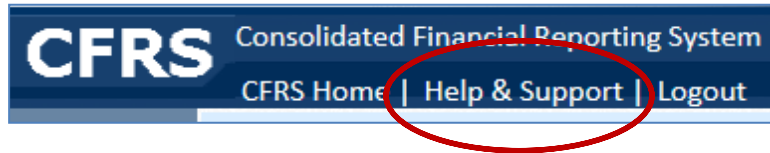
5. Revising a Submission

If a revised charter school subsidy redirection request must be submitted following an initial submission in CFRS, the following steps must be completed:

- Request that PDE reopen the request
Upload revised templates or data entry for contact information
- Upload of a new signed Summary of Unipay Request
- Resubmit no later than the 11:59pm on the 25th of the month

6. User Support

The top navigation menu in CFRS will always show a link for Help and Support:



Depending on the user's current screen, this link will direct users to a different page:

1. When on the Landing Page, Help and Support will link to PDE's general help page:
<https://www.education.pa.gov/Pages/MyPDESuite.aspx>
2. When in CSR, Help and Support will link to the Charter School Funding web page:
www.education.pa.gov/CSFunding

General questions on CFRS should be directed to ra-CFRS@pa.gov.

Questions specifically related to CSR should be directed to ra-CSFunding@pa.gov.