Pennsylvania
Department of Education

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

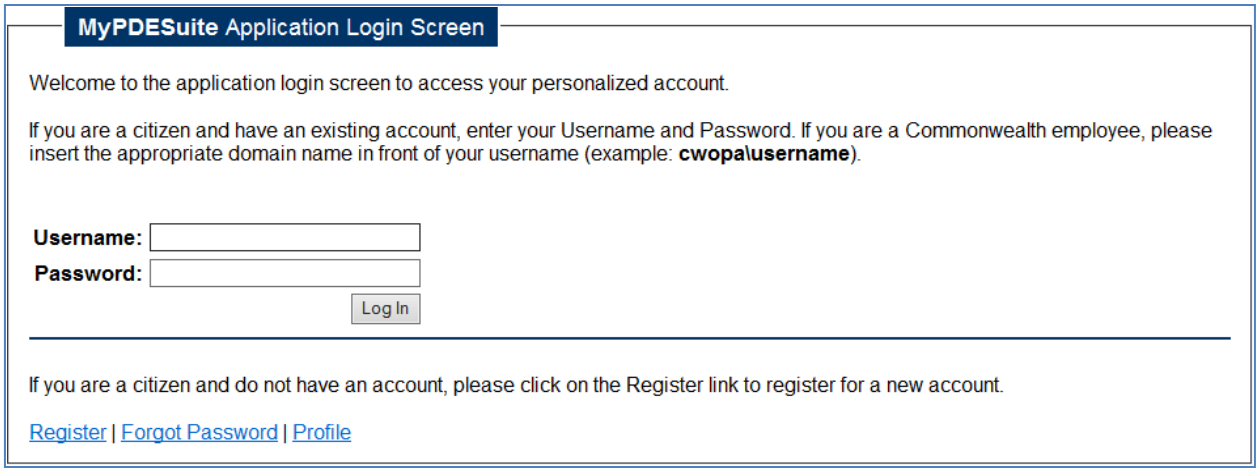
2. Accessing and Updating CFRS-CSR

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:

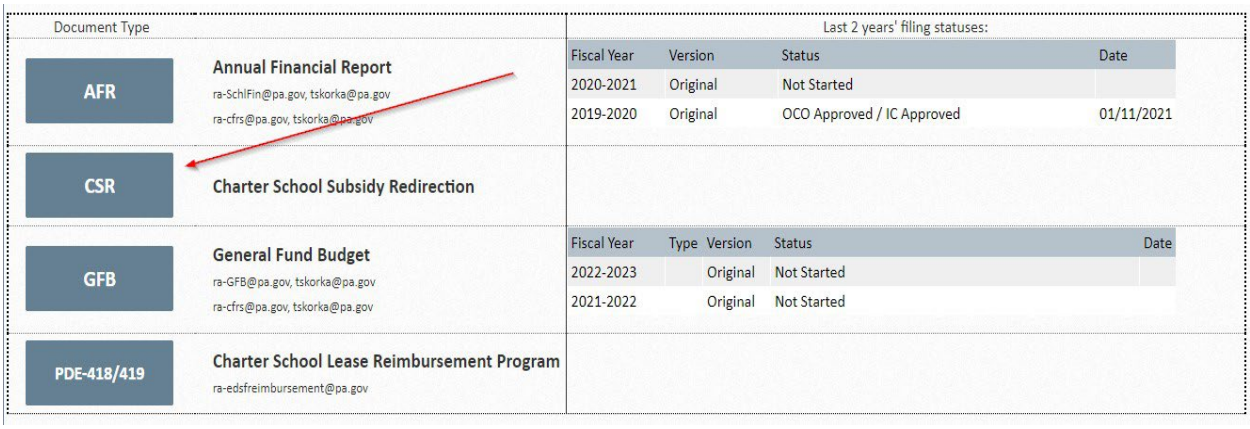
a. Directly on the MyPDESuite Application page: https://www.mypdeapps.pa.gov
or
b. Via PDE homepage: https://www.education.pa.gov

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



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

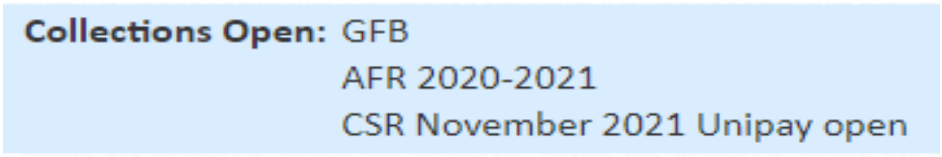
Charter School view



School District view

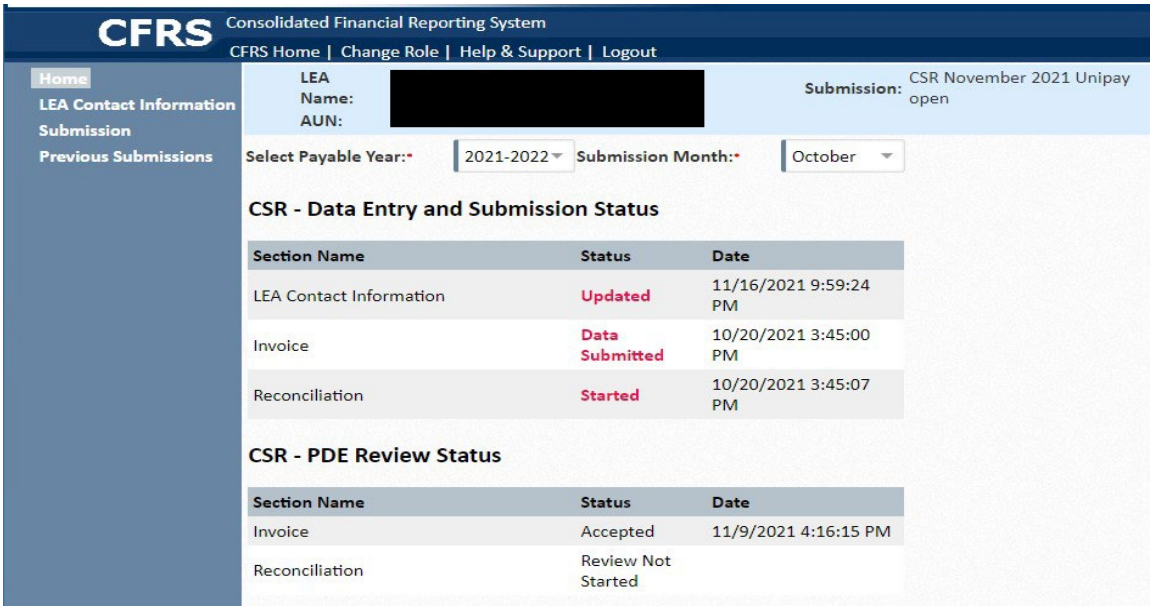
This screen will show the status of the last two years of data submissions within CFRS.

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



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)

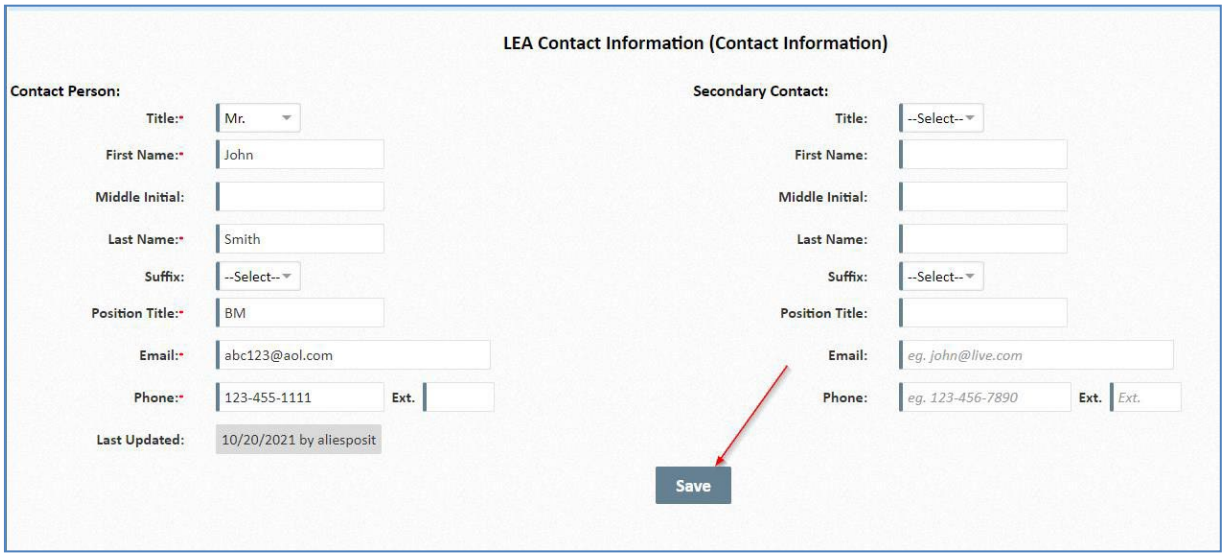


3. Data Entry - Overview and Details

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.



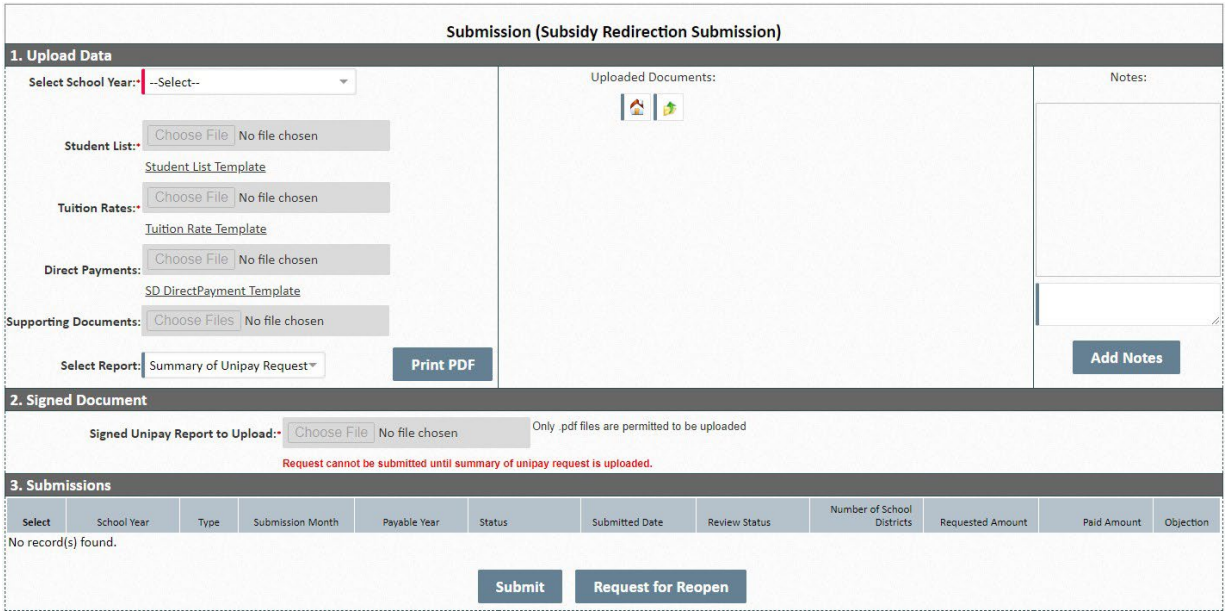
b. Select Submissions

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.

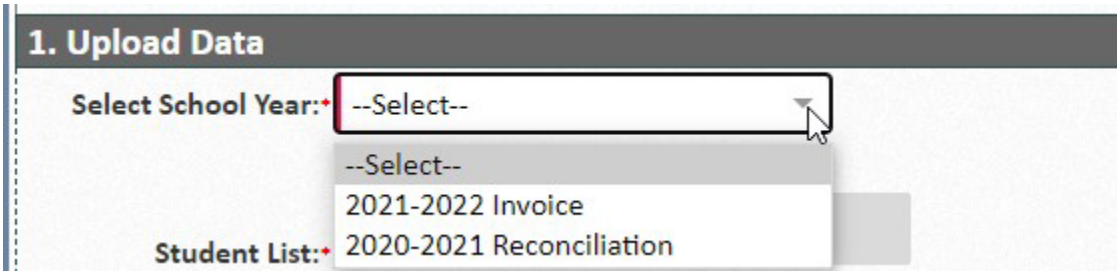
CSR Submission Screen

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



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.

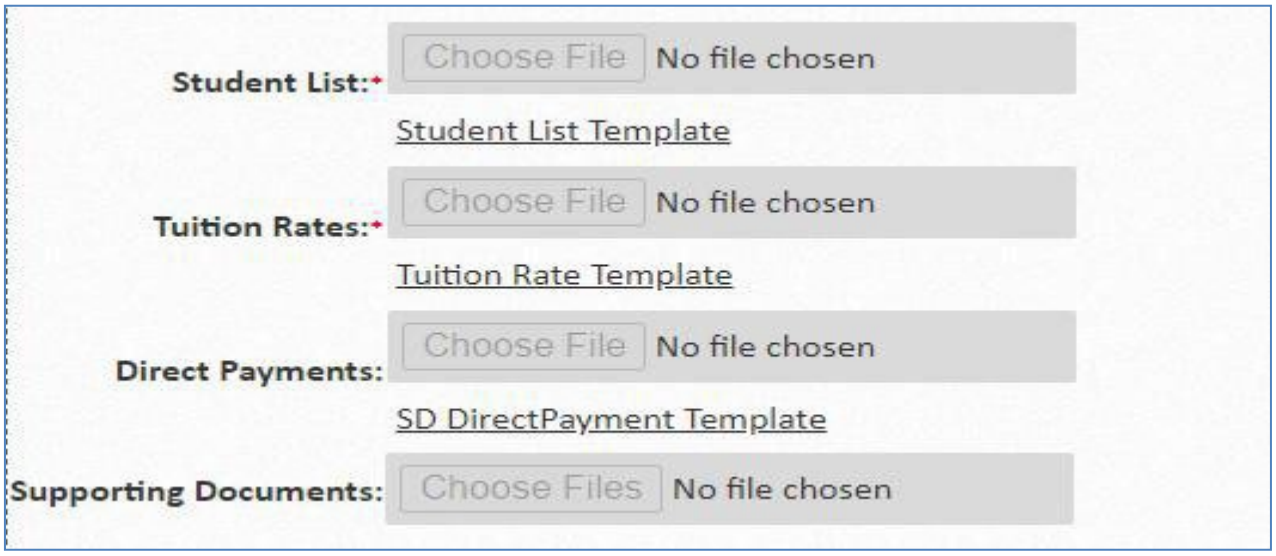


d. Upload Data Files

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

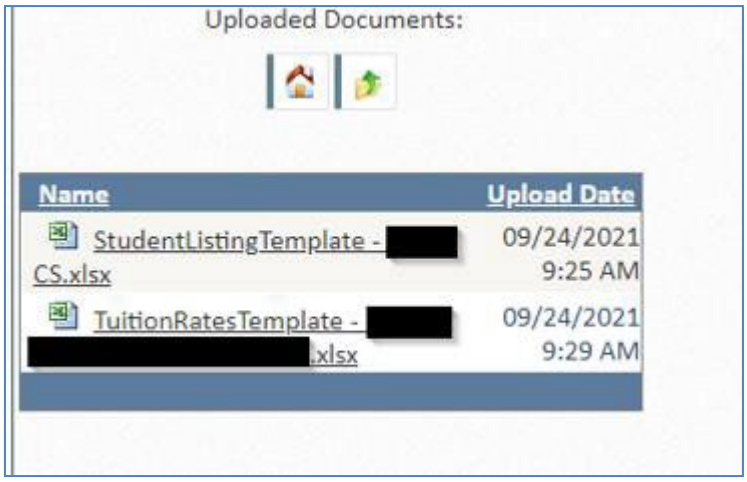
a) Student List – required
b) Tuition Rates – required
c) Direct Payments – applicable if the charter school received direct payment(s) from or provided refunds to school district
d) Supporting Documents – applicable if the charter school has additional information including school district- and/or charter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

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

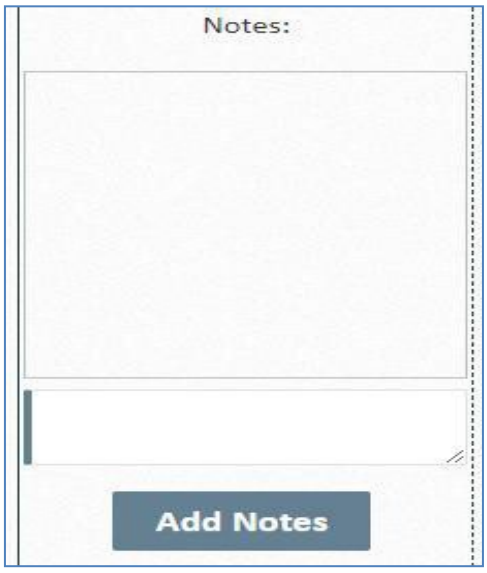


Note: Templates of each file type are easily accessible by clicking the hyperlink under the file selection.

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.



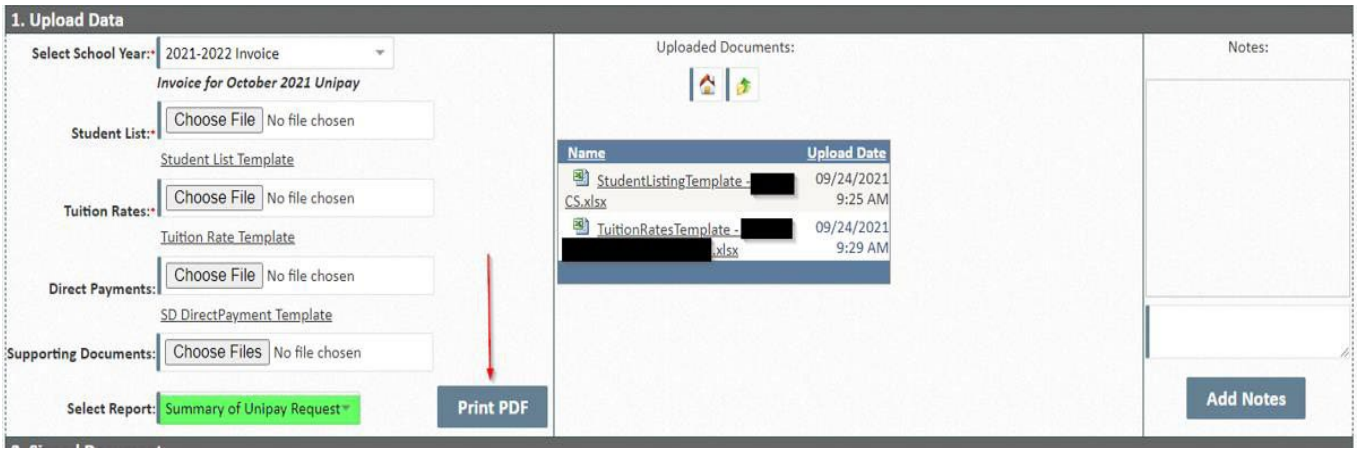
The “Notes” section is available on the right side of the screen for the charter school to add any additional notes relevant to the submission, such as information related to the completion of a CS-created PDE-363.



After the required templates have been successfully uploaded:

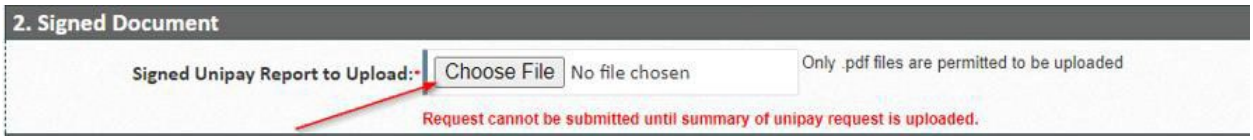
a) Select Summary of Unipay Request (SUR) from drop-down.
b) Select Print PDF to download the SUR.

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.



e. Upload Signed Summary of Unipay Request

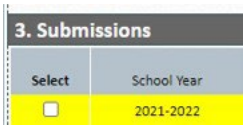
a) Choose and upload the SUR. Failure to submit a signed statement will result in the request not being processed. In addition, data cannot be submitted until the SUR file is uploaded.



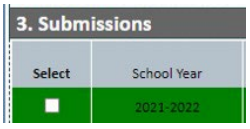
f. Select Submission

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:

Indicates data entry has not been initiated.

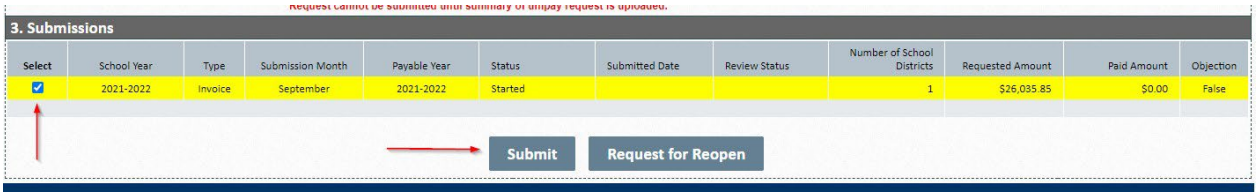


Indicates the Summary of Unipay Request has been uploaded.



Indicates redirection request has been submitted to PDE.

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



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

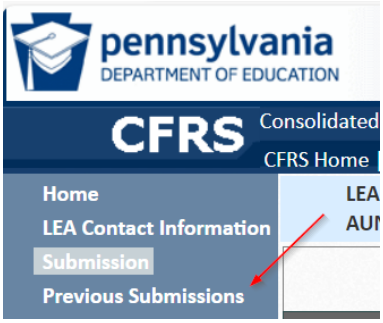
If a revised charter school subsidy redirection request must be submitted following an initial submission in CFRS, the following steps must be completed:

- 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

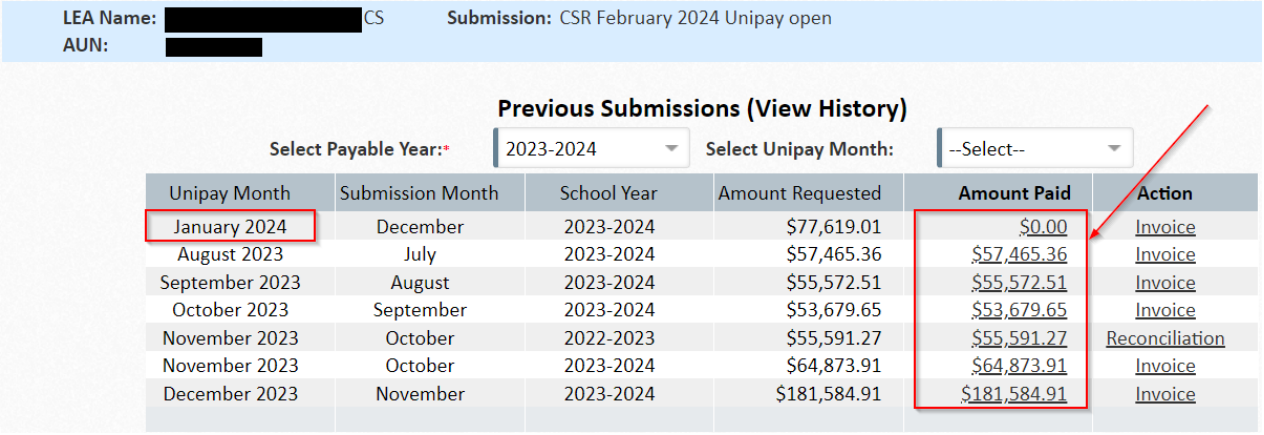
6. Reviewing Payments

The Financial Accounting Information (FAI) application is used by any organization that receives state or federal funds via PDE. However, users must use CFRS-CSR to access and view payment details at the school district level.

To view the payment details in CFRS-CSR, select Previous Submissions.



Users can then select the payment amount link for the applicable Unipay. Please note that details can still be viewed even if the amount paid displays as zero. The amount paid link for pending Unipays is always available no later than the 15th of the month.



LEA Name: [redacted] CS **Submission:** CSR February 2024 Unipay open
AUN: [redacted]

Previous Submissions (View History)

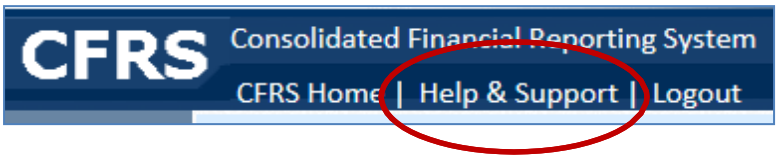
Select Payable Year:* 2023-2024 **Select Unipay Month:** --Select--

Unipay Month	Submission Month	School Year	Amount Requested	Amount Paid	Action
January 2024	December	2023-2024	$77,619.01	$0.00	Invoice
August 2023	July	2023-2024	$57,465.36	$57,465.36	Invoice
September 2023	August	2023-2024	$55,572.51	$55,572.51	Invoice
October 2023	September	2023-2024	$53,679.65	$53,679.65	Invoice
November 2023	October	2022-2023	$55,591.27	$55,591.27	Reconciliation
November 2023	October	2023-2024	$64,873.91	$64,873.91	Invoice
December 2023	November	2023-2024	$181,584.91	$181,584.91	Invoice

Payments are made based upon availability of school district funds. If the amount deducted, as represented on the attached spreadsheet, is less than the amount requested by the charter school, the difference will be deducted from available school district funds if another request is submitted to PDE. However, further payments will only be processed if a new request is submitted to PDE.

7. 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.