# Integrated Programs Reporting and Application WorkApp Technical Guidance

Last updated: September 26, 2025

Integrated Programs Reporting and Application WorkApp link:
https://workapps.smartsheet.com/app/VcvjWVJMP42JxgvHV46vp6R9rC

## Welcome

It is with great excitement that the ODE's Office of Education Innovation and Improvement (OEII) and the Secondary/Post Secondary Transitions Team (SPST) introduce the Integrated Programs Reporting and Application WorkApp. This WorkApp replaces the Integrated Programs Reporting and Application Dashboard (RAD) as the communication portal between the ODE's Student Investment Account (SIA), High School Success (HSS), Early Indicator and Intervention System (EIIS), ESSA Partnerships (CSI/TSI), CTE/Perkins, Every Day Matters, and Continuous Improvement Plan (CIP) programs and our grant applicants/recipients.

What is a WorkApp? A WorkApp is a platform within Smartsheet that allows us to organize and make multiple Smartsheet components available in a single location and accessible by a single link. This allows us to better organize materials into relevant sections without the need for everything to be on a single dashboard. The intent is that this new structure will make navigating and finding what you are looking for even easier.

All application information, grant management, longitudinal performance growth targets (LPGTs), local optional metrics, and reporting for the 2025-27 biennium will be coordinated through the WorkApp. **The single link will be the only one you need to bookmark and keep track of throughout the biennium for these six programs.** The WorkApp will be updated as needed to accommodate the grant agreement process and reporting. It is expected that the link and use of the WorkApp will continue at least through the 2025-27 biennium[1].

The link above is the shared link that everyone will use to access the WorkApp. As with the RAD, the WorkApp is designed so that it changes the content based on who is logged in. If you are a superintendent of a district with sponsored charters, you will see the information for both the district and the sponsored charters. If you are a business manager assigned to all of the districts in your ESD, you will see the information for each individual district, charter, consortia, or JDEP/YCEP. Maintaining access is no small feat; **if the folks in your institution change and access needs to change, please submit the contact information update form. When submitting the contact information update form please make sure to include all institutions that the change will effect.**

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[1] While Smartsheet is not a perfect tool, districts should begin to see the benefits of its capabilities in the move to this singular dashboard with ODE staff having the ability to ''push'' a small change or technical fix through the dashboard for all grantees without needing to send new or changed documents.

This guidance document will serve as both a place to learn to navigate Smartsheet as well as how to submit your application, draft LPGTs, complete quarterly reporting, etc. If you have any questions, please don't hesitate to email us at ODE.EII@ode.oregon.gov. Please also remember that your first step for information on the integration of these programs is the Aligning for Student Success Integrated Guidance Webpage.

# Table of Contents

# Navigating Smartsheet (General Information)

This section contains general information on navigating Smartsheet, the software that is used for the WorkApp.

## Account type

Smartsheet has both free and paid accounts. While you may opt to purchase a Smartsheet account, it is not required to do so for the purposes of the WorkApp or any of the Integrated Program's work. You have access to edit and save everything that you need with a free account.

When first signing up for a free account you will receive a 30-day trial of additional paid features. During this trial period you will occasionally get notices saying you have a certain number of days left. This refers to the end of the trial period for paid features. Once the trial period has ended, you will see the following notifications:
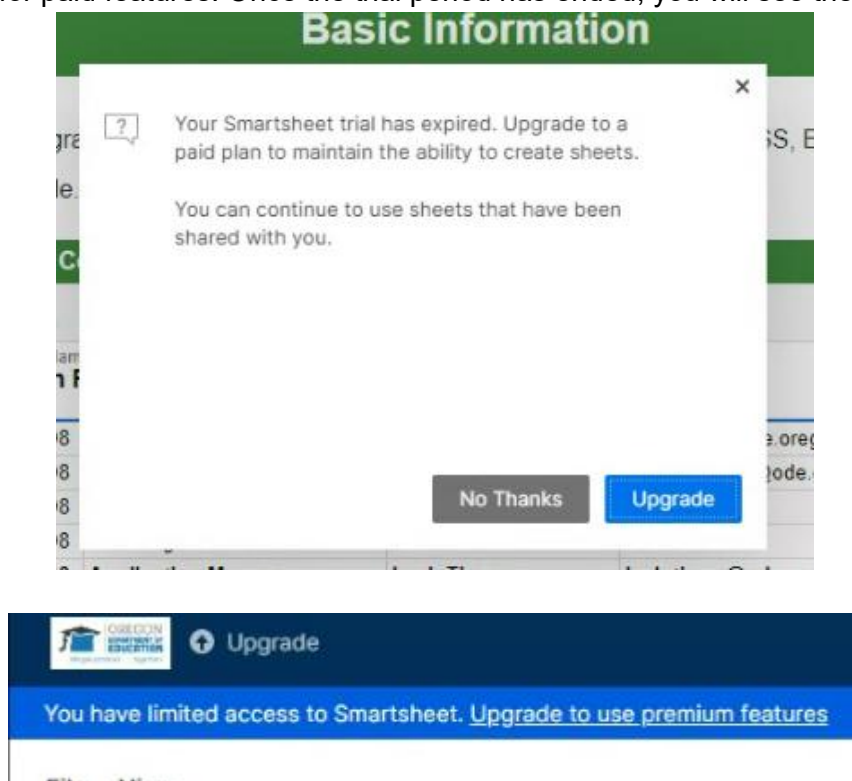




These notifications do not mean that you need to purchase an account to do this work. While a free account means that you will receive these types of notifications, you are not required to purchase an account.

If at any time you change the email address/login for your Smartsheet account, please fill out the contact information update form, noting that it's a Smartsheet email change in the additional information box.

# Where to find the WorkApp

To access the WorkApp without the link you can click on the Launcher menu button in the lower left hand corner to open the launcher menu.
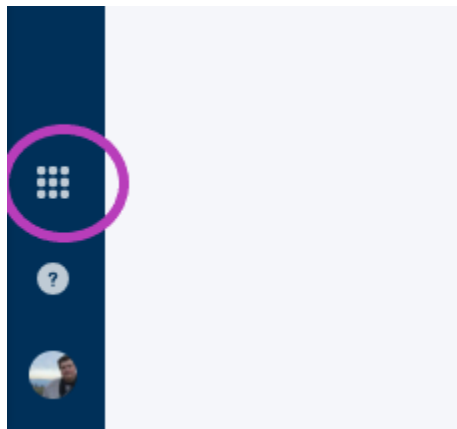


Once the launcher menu is open click on the icon that says WorkApp, it should be the only icon that is visible unless you are using a paid account with additional advanced features.
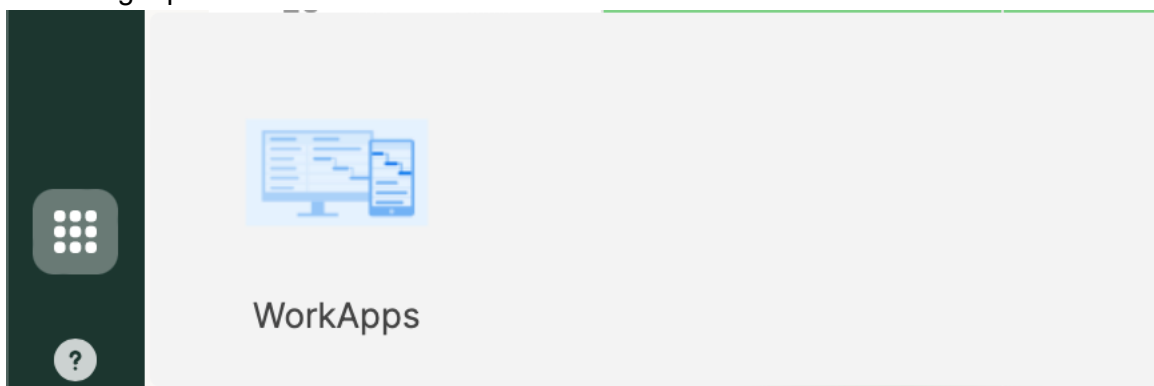


Click the WorkApps button in the Launcher Menu to open Smartsheet WorkApps. Here you will see any WorkApps that you have been shared to. If you **DO NOT** see a WorkApp listed here, then you need to complete and submit the Contact Change Request Form so we can get you added. To open the WorkApp, click on the WorkApp you are wanting to access.
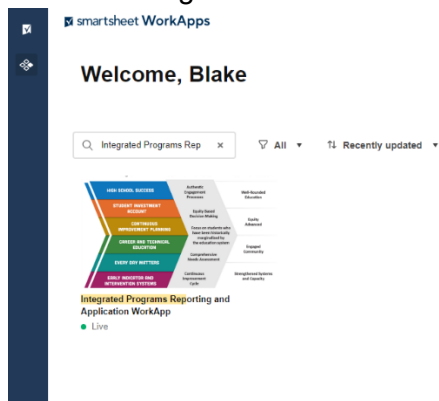
## Favoriting a sheet/dashboard

The WorkApp is designed to keep all useful links and information in one place for you to access throughout the 2025-27 biennium. It is recommended that you add the link to the WorkApp to your browser bookmarks list for quick access. You may also wish to favorite an individual sheet or dashboard for easy access. To favorite something in Smartsheet, click on the star to the right of the title at the top of the page.
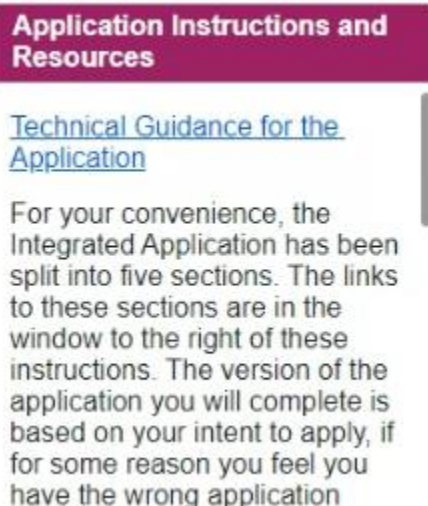
You can then quickly locate the item in your favorites (star icon in the left toolbar) at any time.
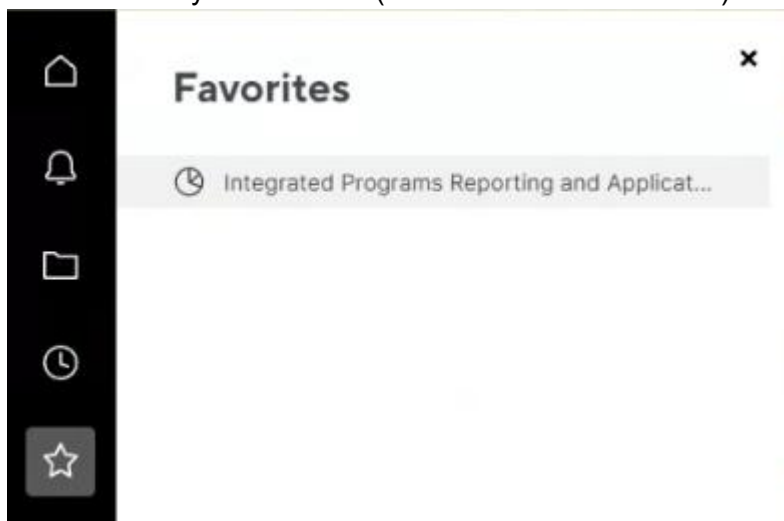
## Scrolling within a display box in the WorkApp

Sometimes, to keep display boxes a manageable size, information extends beyond the display. In this instance, grey scroll bars will appear at the right side or bottom as needed. Click on the scroll bar or scroll with your mouse wheel to see the additional information.

## Autosave and where to adjust

The most frequent request to the ODE regarding Smartsheet is the ability to autosave on sheets while completing reporting. Smartsheet does have an autosave feature, however, best practice is to make sure to save your sheets periodically while working and when about to close the sheet. The ODE does not control the amount of time between autosaves–your autosave settings are personalized to you and are found in your account settings.

To access your account settings, select your account in the very bottom left corner of your Smartsheet account then Personal Settings.
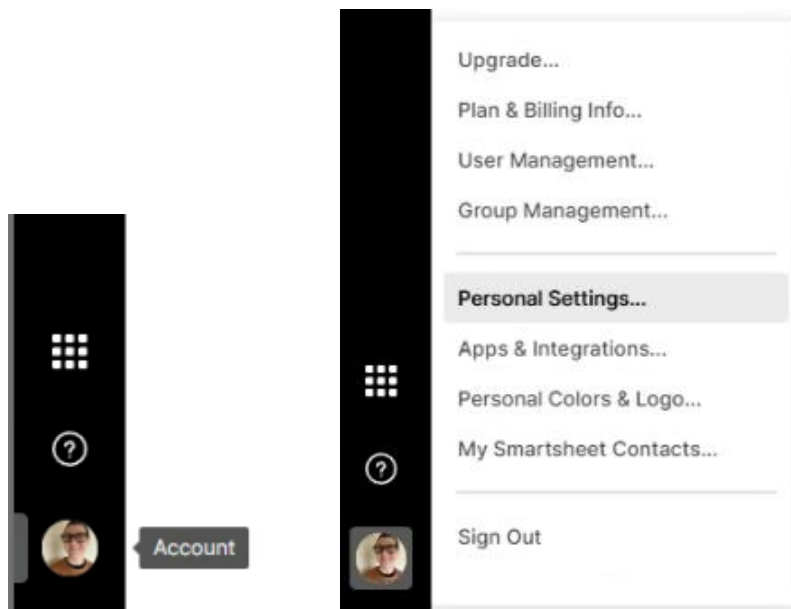


Select the Settings and then make sure/adjust your autosave features. You can change the number of minutes by selecting the blue "_ minute(s)" and changing it.
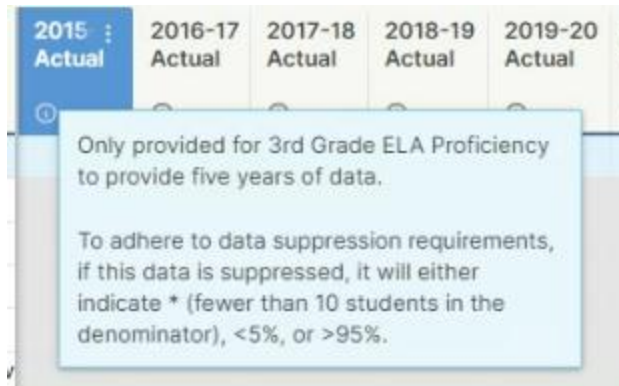
Make sure to save your setting changes to have them take effect!

# Sheet features and edits

The following are features found within sheets (spreadsheets) that are used for LPGTs, budgets, and reporting.

## Information hovers in column headers

Within sheets and displayed reports, there may be additional information contained in the header of the columns. When this is the case, a circled i will appear at the bottom of the header for that column. To view the information, hover your mouse over the i and the information will display.

Only provided for 3rd Grade ELA Proficiency to provide five years of data.

To adhere to data suppression requirements, if this data is suppressed, it will either indicate * (fewer than 10 students in the denominator), <5%, or >95%.

## Saving

**When working on a sheet, be sure to save periodically, even if you changed your autosave settings!** The save button is found at the top left corner of each sheet. If it is greyed out, this means that no changes have been made since the last time it was saved (either autosaved or actively saved). To ensure that your information is not lost, be sure that you save before closing the window.
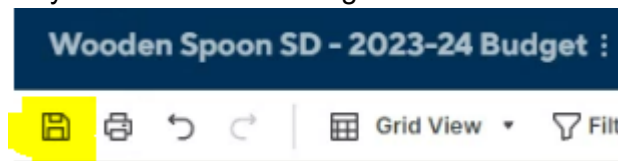


## Column width adjustments

You can change the width of the columns within a sheet! To do so, take your mouse to the header row and drag the grey line between columns in the direction that you want to move it.



## Freezing and Unfreezing Columns

Most sheets will have a specific number of columns pre-frozen for how it's expected to be most helpful. For example, in your budget, this may be just after your Activity column so that when you scroll across, you can continue to see which activity the funds are associated with. To adjust which column is frozen, select the column that you want to freeze through, right click and select "Freeze Column".
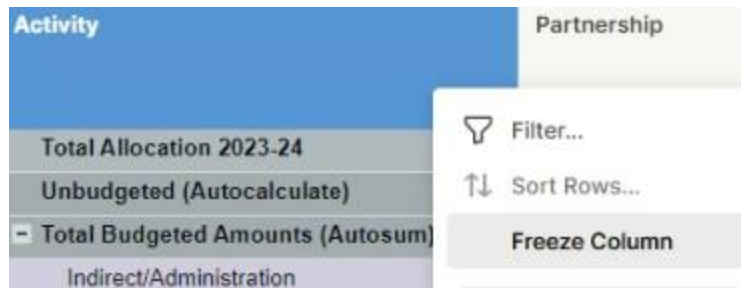
To unfreeze, select any column header, right click, and select "Unfreeze Column".

## Locked columns/rows

Periodically, columns or rows will be locked from edits. This will be indicated by a padlock icon in the header.



Information will be locked when it either has a formula that should not be adjusted or the information is not available for editing at that time. For example, once Longitudinal Performance Growth Targets are set during codevelopment, the information will be locked so that there are no accidental changes.

If there is ever information that you believe needs to change and it is locked, please reach out to your District Grant Manager for support.

## Parent/child rows

Smartsheet uses what it calls "Parent" and "Child" rows to keep rows together that need to be connected. The ODE uses this feature in a lot of budgeting formulas to sum together activities. If your columns are ever not summing correctly, it is likely due to a parent/child error. Please reach out to your District Grant Manager for support as these can quickly get unmanageable.

## Tracking changes

A cool feature in Smartsheet is the ability to see any changes that have been made within a set period of time using the "Highlight Changes" feature.
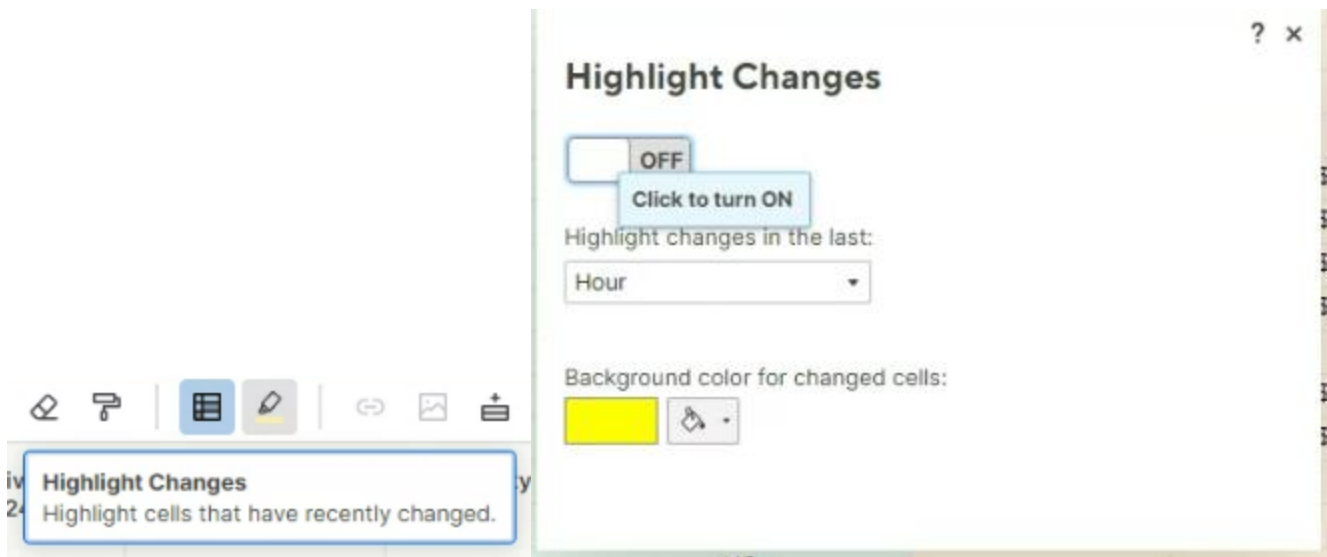
To activate, select the Highlight Changes (highlighter marker) icon in the toolbar and toggle on. This may be a helpful feature if you have multiple people adding information to your smartsheet for reporting or LPGTs and you would like to know what changes have occurred since you last opened the smartsheet.

## Imported/Linked Cell Data

In some cases, it makes sense for information in your sheet to be linked to and populated from another sheet so that ODE staff can quickly adjust the displayed information. The most common place to see this is in the Allocation row on your budget. As allocations are formalized/set, budgets may need adjustment and this will quickly update the information in your sheet. You will see a small blue triangle on the right side of the cell if this contains linked information. You cannot change the information in these cells–please reach out to your District Grant Manager if the information appears incorrect.



## Downloading/Exporting Sheets

At any time, the information in your sheets can be exported for saving to your computer. It is recommended that you export your sheets when you have completed reporting to maintain a copy for your records. To export your sheet, select the three dots next to the name of the sheet at the top, select Export, then the preferred type of file. Exporting sheets is a good way to save a copy for your records, but any changes you make to your exported version will not be reflected in your dashboard or be received by ODE, and there is not a way to upload your changed spreadsheet back into your dashboard. Any changes must be made directly in the Smartsheet sheets.

# Overall Design of the WorkApp

The Integrated Programs Reporting and Application WorkApp is designed to be visually similar to the previous Integrated Programs Reporting and Application Dashboard (RAD). It is set up to organize the work by section. The difference being that with the WorkApp each section is its own tab rather than all being on the same dashboard.
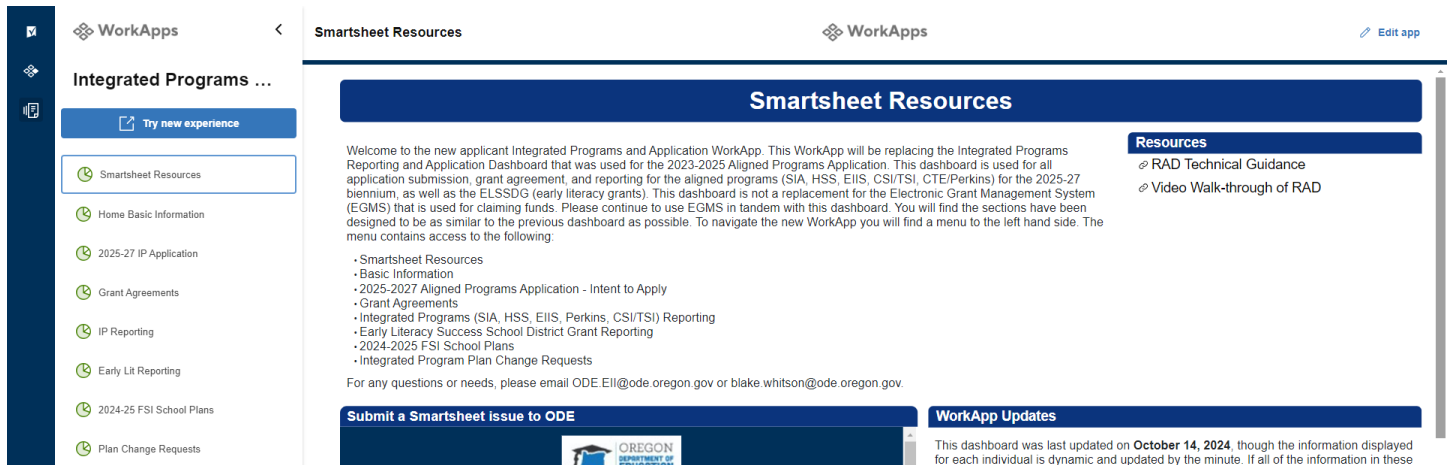


The WorkApp consists of the following tabs:

- Smartsheet Resources – This tab will include this technical guidance, a link to the video walk-through of the WorkApp and additional Smartsheet resource links. General update history will also be available on this tab. We will also have a form you can submit to report Smartsheet issues or suggest enhancements to the WorkApp.
- Home Basic Information – This tab contains general grantee information as well as the contact change request form.
- 2025-2027 IP Application – This tab will have everything related to our 2025-2027 Integrated Programs Application.
- Grant Agreements – Once you've met all of the application requirements and grant agreements are ready they can be accessed here to download, sign, and return.
- IP Reporting – This tab will contain all of your Integrated Application Quarterly Reporting.
- Early Lit Reporting – This tab contains all of the reporting related to the Early Literacy School District Grants
- 2024-2025 FSI School Plans – This tab contains reporting links for schools identified as part of Federal School Improvement Plans.
- Plan Change Requests – Any time you need to submit a change to your plan you can submit that change on this tab.

To navigate between sections, just click on the section you wish to view in the navigation menu to the left. Each section is differentiated by a heading and section color. The color scheme for each section has been retained from the prior RAD. The headings of each box will share the section color so that you can easily differentiate by topic area. The section order and colors may change over time as needed but this will be avoided as much as possible for ease of use.

Overview Video of the WorkApp (14 mins)

You can also minimize the left-hand navigation menu at any time by clicking the arrow icon pointing left at the top of the navigation menu.
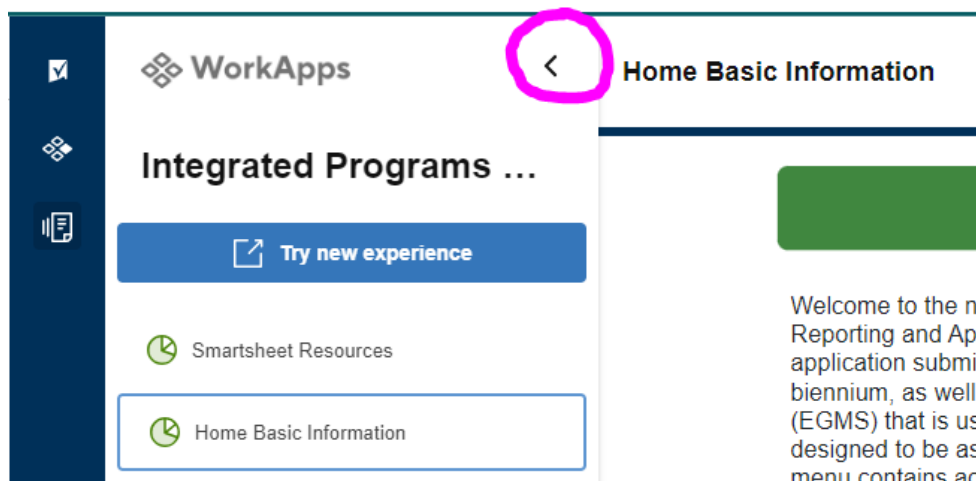
To re-open the navigation menu, you will click on the pages icon on the menu on the lefthand side of the screen, this will cause the full WorkApp navigation menu to re-open.
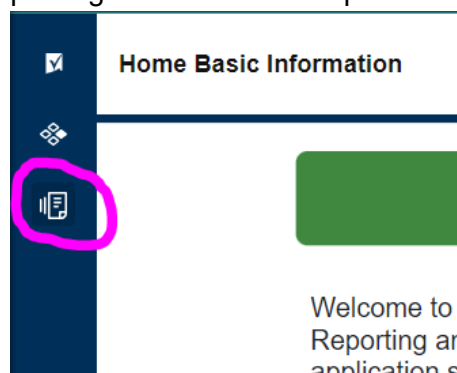
In addition, your display settings (monitor size, resolution, etc..) may make it necessary to adjust how the tabs display on your screen. You can do this by moving your cursor to the upper right corner of the section. A drop-down menu will appear that will allow you to adjust the zoom. You can zoom in, zoom out, zoom to fit (recommended), or zoom to a specific percentage of the page size.
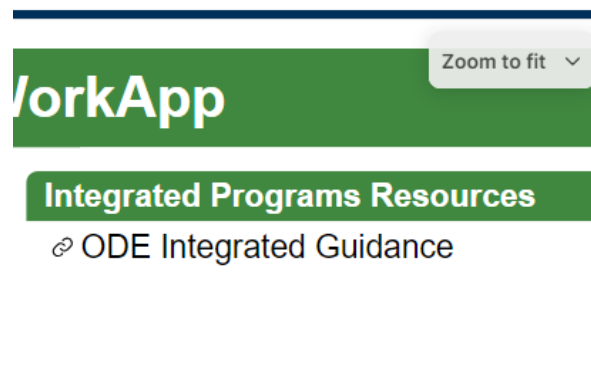
# Smartsheet Resources

The Smartsheet Resources section is designed to display helpful resources for working with Smartsheet and the new WorkApp.



## Resources

The resources in this section will help you navigate Smartsheet and the new Integrated Programs Reporting and Application WorkApp.

## Submit a Smartsheet Issue to ODE

This form will let you submit issues, change requests (not including contact changes), and enhancement suggestions to ODE for review and consideration.

## WorkApp Updates

This section will list universal updates for Smartsheet and the WorkApp. Updates that apply to individual sections will be recorded in the appropriate section.

# Home Basic Information

The Basic Information section is designed to display resources, contact information, and informational links.



## Resources

The resources in this section encompass the Integrated Guidance. For example, the ODE Integrated Guidance is included.

## Points of Contact

This box displays your points of contact for this work. Information will be updated as needed so this is your best location for this information.

The display for this is set to organize by institution. If you are listed as a contact person for multiple institutions, you may see them listed in alphabetical order here. Chances are that the people are the same for all institutions since most of these are geographically/regionally-based but in case not, please make sure that you are reaching out to the person connected to the institution you are communicating about.

Unfortunately, it is not possible in Smartsheet to be able to select or copy information, like email addresses, at this time (how frustrating!) but hopefully this is a feature that is available soon.

## Your Specific Links



The links listed in this section are specific to the institution rather than generalized information. In general, the security on these links is set to "anyone with the link can view or edit"; please be mindful who you share the links with as they may be able to edit your information.

For 25-27 Grantee Specific Links you will see the following:
- **25-27 Budget:** Once your application is approved, this will be available as a viewable spreadsheet. Any changes to your budget after the application process will use this spreadsheet to facilitate communication and shared understanding.
- **25-27 Outcomes and Strategies:** Once your application is approved, this will be available as a viewable spreadsheet. Any changes to your outcomes and strategies after the application process will use this spreadsheet to facilitate communication and shared understanding. Additionally, changes to your Outcomes and Strategies will need to be reviewed by your Integrated Programs Specialist and District Grant Manager.

- **25-27 Tiered Planning:** Once your application is approved, this will be available as a viewable spreadsheet. Any changes to your budget after the application process will use this spreadsheet to facilitate communication and shared understanding. For example, if your final allocation is lower than the estimated allocation and you move things out of your budget, it would get moved into this tiered planning sheet so that everyone is aware that the activity is already reviewed and approved.
- 25-27 Early Literacy Allowable Uses
- 25-27 Early Literacy Inventory: It is a requirement of the Early Literacy grant to keep this Inventory up to date.
- For CTE/Perkins Direct Recipients ONLY: Perkins Direct Budget
- For CTE/Perkins Direct Recipients ONLY: Perkins Direct Recipients Reporting Dashboard
- **Public Google Folder:** This is your Google folder for communication/shared documents between these programs and you. You will see that the internal folders are organized by biennium. Initially, these will just be used to store your application materials but we will also be moving historical documents from SIA, HSS, etc. into the folders so that this information can be found in one place.

For 23-25 IP Application Links
- Public Google Folder
- 2023-24 Budget
- 2024-25 Budget
- 2023-25 Tiered Planning
- 2023-25 Outcomes and Strategies

## 25-27 Allocation Amounts and EGMS Claims

**25-27 Allocations and EGMS Claims**

☆ **Allocations and EGMS Claims 25-27** ⓘ

▽ Filter

| Grantee Name | SIA 25-26 Allocation | SIA 26-27 Allocation | Note on EGMS Numbers | Date Updated | SIA Awarded | SIA % Claimed | SIA Remaining | HSS 25-26 All |
|---|---|---|---|---|---|---|---|---|
| Wooden Spoon SD | $53,001.23 | $186,194.12 | Please note that the "Awarded", "Claimed", and "Remaining" columns reflect EGMS numbers as of the "Date Updated". | 09/24/25 | $1,549,235.42 | 16.74% | $1,289,851.10 | |

This report displays the dollar amounts for each program/funding stream for which you have applied and are receiving funds. The Allocation amounts will match those in your budgets for each year. The remaining columns reflect EGMS claims. Please note that EGMS numbers are updated only periodically -- the date those numbers are updated appears in yellow.

# DCPA SIA Passthrough and Indirect 25-27

**For Districts with Partially Administered Charters**

☆ **DCPA SIA Passthrough and Indirect, 2025-27** ⓘ

▽ Filter  |  🔲  |  🔁

| District | Charter School | SIA Passthrough Percentage | SIA Charter Indirect % Allowed | District % Admin Retained | Y1 SIA SD and Charter Allocations | Y1 SIA Allocation on Budget/RAD | Y1 SIA Allowable Admin Max per Allocation | Y1 SIA Report Expenditures |
|---|---|---|---|---|---|---|---|---|
| Wooden Spoon SD | Wooden Fork | | | | #INVALID VALUE | #INVALID VALUE | #INVALID VALUE | $0.00 |
| | Wooden Fork | 100.0% | 5.00% | 0.0 | #INVALID VALUE | #INVALID VALUE | #INVALID VALUE | $0.00 |

This report shows district and charter SIA budget amounts after DCPA language is applied. Passthrough and Admin/Indirect percentages are taken directly from DCPA language. Note that SIA Indirect allowed is 5% of *expenditures*, so the "Y_ Total Charter Admin Allowed from Expenditures" and "Y_ SIA Exp. Allowable Admin" columns will update as expenditures are reported in the budget throughout the year. "Y_ SIA Allowable Admin Max per Allocation" shows the maximum Admin/Indirect assuming grantees spend the entire allocation. This report will appear blank if you do not have partially administered charters.

# 2025-27 Integrated Programs Reporting



Reporting for all Integrated Programs (HSS, EIIS, SIA, CSI/TSI, Early Literacy and Perkins Direct Recipients) is now completed through **one quarterly report**.

The information below outlines the displays on the WorkApp itself and what is included in each section. For instructions on how to complete quarterly reporting, look for the folder of reporting guidance that is linked on the WorkApp's Reporting Instructions section located under the Reporting Information and Resources header.

## Purpose of Quarterly Reports

- The six integrated programs represent key investments into education systems change in Oregon that are rooted in community engagement and transparency. Quarterly reporting allows for increased transparency and accountability to our communities, taxpayers and legislators.
- Integrated Programs Progress Reports combine fiscal and implementation reporting in order to reflect on and illuminate the ways in which integrated activities are contributing to shifts and changes in attitude, behavior, action or policy, even if unintended.

- ODE views this effort as a partnership, our intent is that grantees use this report as a space to communicate both successes and challenges in the implementation of the integrated programs that will assist ODE in identifying legislative needs or gaps and/or offer support to grantees.
- Quarterly Reporting replaces the need to complete six different ODE reports and to provide claims documentation that was previously required for some programs - CSI/TSI, for example.

## IP Reporting for Charter Schools

**Independent Charter Schools**
Independent Charter Schools will have their own WorkApp and will report in the same way that the district reports as outlined in this document.

**District-Sponsored Partially Administered and State-Sponsored Charter Schools**
*Partially administered* charter schools applying with a district will report on their own individual reporting dashboards using their link to the Integrated Programs Reporting and Application WorkApp. The charter reporting dashboards will be viewable by the district.

**Fully Administered Charter Schools**
*Fully administered* charter schools will collaborate with the district to submit their reports via the district reporting dashboards. This means that authorized charter users of the WorkApp will only see the districts' reporting links and information and there will not be links that are specific to the charter (except for Early Literacy Inventory and Allowable Use links).

**Virtual Charter Schools**
Virtual charter schools will have their own WorkApp and will report in the same way that the district reports as outlined in this document.  For SIA-specific board presentation requirements such as the Quarter 2 financial audit presentation and the Quarter 4 annual report presentation, we recommend that virtual charters present these items to their Boards as a best practice; however, it is not required by ODE.

## Reporting Information and Resources

| Reporting Information and Resources | | |
|---|---|---|
| **2025-27 Reporting Instructions** | **Spend and Claim By Dates** | **2025-27 Reporting Windows** |
| 2025-26 Folder of Reporting Guidance: Contains a folder for each quarter's reporting that includes additional details on how to report and what to include. | **SIA, High School Success, and Early Literacy Grants (Disbursement):** <br> · Spend by June 30, 2027. Claim by June 30, 2027. <br><br> **EIIS (Reimbursement):** <br> · Spend by June 30, 2026. Claim by August 14, 2026. <br><br> **FSI, Perkins Direct (Reimbursement):** <br> · Spend by September 30, 2026. Claim by November 14, 2026. | Aligned reporting for all programs (HSS, SIA, EIIS, Early Literacy, FSI, CTE Perkins) <br><br> **2025-26 Reporting** <br> · **Q1: Oct 1 - Nov 15, 2025** <br> · Balanced budgets, Assurances for Notice of Nondiscrimination, HSS Self-Assessment, Contact list review. <br> · FSI and Perkins Direct: Final expenditures through 9/30/25. <br> · **Q2: Jan 1 - Feb 15, 2026** <br> · Expenditures, financial audit board minutes, Progress Markers and Narrative questions <br> · **Q4/Annual: July 1 - August 15, 2026** <br> · Early Literacy data, Annual Report questions, URL where Annual Report is posted, Board meeting minutes showing presentation, Progress Markers, expenditures from 1/1/26-6/30/26, FSI Progress Update (if applicable) |

The Reporting Information and Resources tab contains informational resources that will help you complete your quarterly reporting. Under the 2025-27 Reporting Instructions header will be links to reporting guidance, video walkthroughs, and additional instructional notes regarding reporting. Under the Spend and Claim by

dates you will find the dates that funds must be expended by and claimed by for each program. And under the 2025-27 Reporting Windows header you will see the reporting dates for each quarter and what is required for that quarter's reporting.

## 2025-2027 Reporting Links

This section contains all of the links you will need to complete your quarterly reporting. These are the same links that are also displayed in the Home Basic Information Tab.

## Grantee Access List





You can now view who has access to your WorkApp at any time by going to the Grantee Access section on the 2025-27 IP Reporting Tab. We recommend doing a regular review of who has access to and submitted a access change request as needed in order to keep this up to date. To view the full list, click on the row with your institution and it will open a details tab where you can see who has access.

NOTE: you will not be able to edit access via the details view, to make changes you will need to submit the contact change request form, found on the Smartsheet Resources tab.

## 2025-2027 IP Reporting

For 2025-2027 you will not need to submit a form to indicate you have completed reporting. Rather you will use a view in the WorkApp, similar to how you submitted your initial 2025-27 IP Application. In addition to being linked above, the reporting view also has the links you will need to complete your reporting. Once ready to finalize your reporting, click the row with your institution name -- this will open the details tab where you can complete your reporting. The details tab will include any additional assurances or questions you will need to answer. To complete your reporting, you will enter the date you finished your reporting and click save. In addition to the reporting, this details tab will also allow you to select the level of access your ESD Liaisons have to your grantee materials via their ESD Liaison WorkApp. You can access this and change their level access at any time regardless of the reporting period or status of your reporting.

**Details**                                          ×

Data     Attachments (0)

**Grantee Official Name**

Wooden Spoon SD

**Please select the level of access you would like for your ESD Liaison to have**

I want the ESD team to view only access        ×   ⌄

**We have reviewed our contacts and who has access to our data via the WorkApp and have submitted any necessary changes**

# Grant Agreements



The Grant Agreement section is simple; it consists of only the instructions (left) and the grant agreement download and upload tool.

Each funding stream of your Integrated Plan continues to have a separate grant agreement, because funding streams have separate requirements and allowability. In the Grant Agreement section you should expect to see grant agreements from Student Investment Account (SIA), High School Success (HSS), Early Literacy Success School District Grants (ELSSDG), and Early Indicator and Intervention System (EIIS). If you are a CTE Perkins direct recipient and/or ESSA Partnerships (CSI/TSI) recipient, you will not see these reflected here as this only includes state-funded grant programs.

## Grant Agreement Instructions

[Video Walkthrough of the Grant Agreement Section](#) (3:45)



This section has a link to the walk-through video to assist with understanding the process as well as high-level instructions for completion. Use the scroll bar on the right side of the box to scroll down.

**To complete your grant agreement downloads and uploads, complete the following steps:**



1. Download the PDF of the grant agreement from the row of the GA Dynamic View that has the green checkbox in the "Grant Agreement Uploaded by ODE" column.
   a. To download, click on the row for that grant agreement. A "details tab" window will pop up. It contains a "Data" tab and an "Attachments" tab. Navigate to the Attachments tab and click on the grant agreement PDF. This will open the PDF in your browser for you to download.



2. Have the appropriate person sign your grant agreement and save it as a PDF in your files (in a place you can find!).
3. To upload your signed grant agreement, navigate back to the "attachments" tab by clicking on the correct row for that grant agreement.
   a. Click on the blue "Attach a file" button and find the signed grant agreement from your files.
      i. For your Student Investment Account (SIA) grant agreement, you also need to upload the board meeting minutes from your board. The meeting minutes (draft minutes are acceptable) must indicate a presentation to the board and approval by the board (not a consent agenda) of your grant agreement, which includes your Longitudinal Performance Growth Targets (LPGTs) and must have had the opportunity for public comment.

> ii. Reach out to your District Grant Manager if you accidentally upload the wrong file and we'll get it cleaned up for you.

4. **FINAL STEP:** Once the file is attached, navigate to the "Data" part of that pop-up window. There is a checkbox under the header "Grant Agreement signed and uploaded by Institution". Check this box and click "Save" (blue button). This will notify ODE that you have uploaded your grant agreement (and board meeting minutes for SIA).



## Institution Name and Fiscal Agent

Some districts will also have rows for the grant agreements that their district-sponsored charter schools (partially-funded) will be signing and returning. . Please Note: Notifications from Smartsheet to sign Grant Agreements will go to anyone listed as a WorkApp contact. Please be sure to update your WorkApp contacts to include both the district and district-sponsored charter contacts as appropriate. **The Grantee is required to sign the Grant Agreement, but it is the district's responsibility to assist their sponsored charters in receiving and returning Grant Agreements to ODE.**

## Program

The program column shows all funding streams for which you will have a grant agreement. **If these program streams are incorrect, contact your District Grant Manager (shown in your contacts at the top of the WorkApp) immediately to resolve.**

## Notes

This column is to clarify any special circumstances regarding that grant agreement's fiscal agent or the status of the grant agreement upload. The goal of this column is to provide transparency throughout the process.

## Grant Agreement Uploaded by ODE

This column has three icons to indicate where the grant agreement is prior to uploading to this portal.

⚠ A yellow exclamation mark indicates that grant agreement is on hold. Review GA Notes column for details

✅ A green check mark indicates that the grant agreement for the program is uploaded by ODE

❌ A red x indicates that the grant agreement is not yet ready for uploading by the ODE

### GA Notes

This gives further detail for the Grant Agreement Uploaded by ODE status (red/yellow/green). For instance, if your grant agreement is on hold, it means that some action is needed to get the issue resolved. This column has some detail for what is needed. For further information, reach out to your District Grant Manager.

### Grant Agreement Verified by ODE

Once you have uploaded your signed agreement, the ODE will check to make sure that all requirements are in place, then verify that this grant agreement is recorded. When that verification has been completed, the star for that row will be selected and ODE EGMS staff will be alerted that the funds are ready to be released.

### Funds Released

Once all paperwork has been completed, the funds in the subgrant in the Electronic Grants Management System (EGMS) will be released for the grantee to claim. Once the funds in the subgrant have been released in EGMS the grantee will see a green checkmark indicating the funds have been released and the grantee will receive a notification from smartsheet. Note, this does not indicate when you can claim funds or how much you can claim at a time. For more detailed information on expenditure dates and disbursement amounts , please refer to your grant agreement.

For more detailed information on the claiming of funds, please reach out to our EGMS team at ode.egms@ode.oregon.gov.

# 2023-25 IP Reporting Tab

Reporting for all Integrated Programs (HSS, EIIS, SIA, CSI/TSI and Perkins Direct Recipients) is now completed through **one quarterly report**.

The information below outlines the displays on the WorkApp itself and what is included in each section. For instructions on how to complete quarterly reporting, look for the folder of reporting guidance that is linked on the WorkApps's Reporting Instructions section.

## Purpose of Quarterly Reports

- The six integrated programs represent key investments into education systems change in Oregon that are rooted in community engagement and transparency. Quarterly reporting allows for increased transparency and accountability to our communities, taxpayers and legislators.
- Integrated Programs Progress Reports combine fiscal and implementation reporting in order to reflect on and illuminate the ways in which integrated activities are contributing to shifts and changes in attitude, behavior, action or policy, even if unintended.
- ODE views this effort as a partnership, our intent is that grantees use this report as a space to communicate both successes and challenges in the implementation of the integrated programs that will assist ODE in identifying legislative needs or gaps and/or offer support to grantees.
- Quarterly Reporting replaces the need to complete six different ODE reports and to provide claims documentation that was previously required for some programs - CSI/TSI, for example.

## IP Reporting for Charter Schools

**Independent Charter Schools**
Independent Charter Schools will have their own WorkApp and will report in the same way that the district reports as outlined in this document.

**District-Sponsored Partially Administered and State-Sponsored Charter Schools**
*Partially administered* charter schools applying with a district will report on their own individual reporting dashboards using their link to the [Integrated Programs Reporting and Application WorkApp](). The charter reporting dashboards will be viewable by the district.

**Fully Administered Charter Schools**
*Fully administered* charter schools will collaborate with the district to submit their reports via the district reporting dashboards. This means that authorized charter users of the WorkApp will only see the districts' reporting links and information and there will not be links that are specific to the charter.

**Virtual Charter Schools**
Virtual charter schools will have their own WorkApp and will report in the same way that the district reports as outlined in this document.  For SIA-specific board presentation requirements such as the Quarter 2 financial audit presentation and the Quarter 4 annual report presentation, we recommend that virtual charters present these items to their Boards as a best practice; however, it is not required by ODE.

# 23-25 IP Reporting Dashboard Sections

You will access your Quarterly Reports via the WorkApp.



## 2023-25 Reporting Instructions



This section is updated on a regular basis to include links to reporting guidance as well as videos walking through what is needed to report.

## 2023-25 Reporting Windows



This section includes the dates for each quarter's reporting. The current reporting windows are in bold and any changes to reporting windows are communicated out and updated here.

## 2023-25 Reporting Links: Current Reporting Window

| 2023-25 Reporting Links: Current Reporting Window | | |
|---|---|---|
| **Grantee Name** | **Type of Link** | **Reporting Link** |
| Wooden Fork Charter | 2023-24 Budget and Reported Spent | https://app.smartsheet.com/b/publish?EQBCT=c1d2ba1b088247648ae182c2bb06b401 |
| Wooden Fork Charter | Progress Markers | https://app.smartsheet.com/b/publish?EQBCT=5107cc9e874b4a49beef5d70b11c79ad |
| Wooden Spoon SD | 2023-24 Budget and Reported Spent | https://app.smartsheet.com/b/publish?EQBCT=9d57fc50796a44f0b22fa4f1a5ed5800 |
| Wooden Spoon SD | 2024-25 Budget and Reported Spent | https://app.smartsheet.com/b/publish?EQBCT=e684f140a0964a06b29d15d37d4011db |
| Wooden Spoon SD | 2024-25 Budget and Reported Spent | https://app.smartsheet.com/b/publish?EQBCT=e684f140a0964a06b29d15d37d4011db |
| Wooden Spoon SD | 23-24 Perkins Annual Report | https://app.smartsheet.com/b/form/aa633b357df148e4b498af1bdfdedac7 |
| Wooden Spoon SD | Annual Reporting Questions | https://app.smartsheet.com/b/publish?EQBCT=76325e85b5d54bb48ddb4e6627cdd180 |

This report displays the grantee name, type of link for reporting, and the link itself. The links included are:
- Budget/Spending
- Progress Markers
- Annual Reporting (only during Q4)
- If applicable, Perkins Annual Report (only during Q4)

## 2023-25 Reporting: Informational

| 2023-25 Reporting: Informational | | |
|---|---|---|
| **Grantee Name** | **Reporting Link** | **Type of Link** |
| Wooden Spoon SD | https://app.smartsheet.com/b/publish?EQBCT=b122ae8b0e58419aa49afe1ab0c8885c | Informational: Budget Roll-up Across Quarters |
| Wooden Fork Charter | https://app.smartsheet.com/b/publish?EQBCT=b944e0b7b84345c68dd961a91a15ae73 | Informational: Budget Roll-up Across Quarters |

This section includes a Budget Roll-Up Across Quarters so that you can see your spending across programs and quarters all on one sheet. There is no reporting requirement for this link—it is informational only.

## 2023-25 IP Reporting Status Tracker

| 2023-25 IP Reporting Status Tracker | | | | |
|---|---|---|---|---|
| **Grantee Name** | **Reporting Period** | **Submitted by Grantee for Review** | **ODE Requested Additional Info** | **ODE Reviewed and Approved** |
| Wooden Spoon SD | Q1 Due: Oct 31, 2023 | 06/13/23 | 10/10/23 | 10/13/23 |
| Wooden Spoon SD | Q2 Due: Feb 29, 2024 | | | |
| Wooden Spoon SD | Q3 Due: April 30, 2024 | | | |
| Wooden Spoon SD | Q4/Annual Due: Nov 30, 2024 | | | |
| Wooden Spoon SD | 24-25 Q1 Due: Oct 31, 2024 | | 09/04/24 | 09/05/24 |
| Wooden Spoon SD | 24-25 Q2 Due: Jan 31, 2025 | | 09/17/24 | 09/01/24 |
| Wooden Spoon SD | 24-25 Q3 Due: April 30, 2025 | | 09/17/24 | 09/17/24 |
| Wooden Spoon SD | 24-25 Q4/Annual Due: Nov 30, 20 | | 09/17/24 | 09/17/24 |

This section displays the dates when reporting was received and approved for each quarter. Reporting that has been reviewed and approved will have a green background.

**2023-25 Integrated Program Completed Reporting Form**



This form is used to indicate that the quarterly reporting for the selected reporting period has been completed and is ready for review by ODE. The included questions change depending on the quarter selected and may include a space to upload attachments.

# SIA Performance Review Submission

The SIA Performance Review can be found on the WorkApp in the Integrated Program (SIA, HSS, EIIS, Perkins, CSI/TSI) Reporting Tab.

**Integrated Program (SIA, HSS, EIIS, Perkins, CSI/TSI) Reporting**

The SIA Performance Review is directly below the 2023-2025 Reporting: Informational.



The SIA Performance Review Submission can either be completed by the grantee on their own or collaboratively with their ODE Regional Support partners. The following instructions are for grantees that choose to complete the review on their own.

You want to first review prior annual report submissions and submitted strategies. To assist with this, ODE has compiled your previous annual report responses and submitted strategies and made them available as a PDF document. To access this document:

Click on your institution name in the view labeled "SIA Performance Review Submission". Once you have clicked on your institution name, the Details panel will open on the right-hand side. At the top you will see two tabs, one that says data and one that says attachments (1)

Click on the tab header that says Attachments (1). This will show you an attached PDF document that contains your prior annual report responses and strategies



You can then click on the attachment to download it to your computer and open it to review.

After reviewing your prior annual report responses and strategies you can then complete the narrative responses for the Performance Review.

Click on your institution name in the view labeled "SIA Performance Review Submission". Once you have clicked on your institution name, the Details panel will open on the right-hand side. At the top you will see two tabs, one that says data and one that says attachments (1), you will want to make sure you are on the data tab to see the narrative questions.

Once you see the narrative questions you can enter your responses. You can either type directly into the text fields or you can copy and paste from another document such as word or google docs. Please note that there is a 4,000 character limit on all text boxes.

Once you've completed all three responses you can then click the blue save button that automatically appears at the bottom of the details panel to finish your submission. Please note that the Save button will not appear until there is text in all three response boxes. If you would like another space to draft your responses before submitting them in Smartsheet, you may use this Word template.



If you are completing this collaboratively with your ODE Regional Support partner, you will be able to see any response they type in on your behalf by clicking on your institution name in the view to open the details tab. To review responses submitted on your behalf:

Click on your institution name in the view labeled "SIA Performance Review Submission". Once you have clicked on your institution name, the Details panel will open on the right-hand side. At the top you will see two

tabs, one that says data and one that says attachments (1), you will want to make sure you are on the data tab to see the narrative questions and review what has been submitted on your behalf. Note, it may be necessary to refresh the RAD in order to see the latest saved changes.



From here you can edit any response as needed or follow up with your regional partner to request changes.

# 2021-23 Reporting

**1/19/24 Update: This section is now below the SIA Performance Reporting section on the IP Reporting Tab, and only the reporting links are still available. All reporting deadlines and submission forms for 2021-23 are closed.**



## 2021-23 Reporting Links

This section displays the links to past reporting dashboards for High School Success and the Student Investment Account.

*Not seeing a link does not necessarily equate to not having to submit reports.* If the link space is blank, it is either because you don't have a reporting link for that program OR your formation is now a consortium that does not match the formation you were in for the 21-23 biennium. Please see your email communication that is sent at the beginning of the reporting period for the links to your dashboard.

# 2023-25 Early Literacy District Grant Reporting

## 23-25 ELSSDG Reporting Links

**23-25 ELSSDG Reporting Links**

| Grantee Name | Type of Link | Reporting Link |
|---|---|---|
| Wooden Spoon SD | 2023-24 ELSSDG Budget and Reported Spent | https://app.smartsheet.com/b/publish?EQBCT=3a25254630764f7e8c42c44430ac3bda |
| Wooden Spoon SD | 2023-27 ELSSDG Inventory | https://app.smartsheet.com/b/publish?EQBCT=24be062e0f864b219da918ca6cacec32 |
| Wooden Spoon SD | Extended Learning - District Level Data Form | https://app.smartsheetgov.com/b/form/7d753d6301454a368b5fc596fa0eb12a |
| Wooden Spoon SD | Extended Learning - School Level Data Form | https://app.smartsheetgov.com/b/form/9d492c49094e4849a392fc86593965de |
| Wooden Spoon SD | High-Dosage Tutoring - District Level Data Form | https://app.smartsheetgov.com/b/form/821910148c994b60b60d60f1e7d5ee18 |
| Wooden Spoon SD | Professional Development & Coaching Participation rep | https://app.smartsheet.com/b/form/a702c4cb2568475499493d33dd665742 |
| Wooden Spoon SD | 2024-25 ELSSDG Budget and Reported Spent | https://app.smartsheet.com/b/publish?EQBCT=8a2b70cc40874acc80b41000f97c1be0 |

This report displays the grantee name, type of link for reporting, and the link itself. The links included are:
- Budget/Spending
- Inventory
- Annual Reporting Forms (only for Q4), which include data collection forms for Extended Learning, High Dosage Tutoring, and Professional Learning

**2023-25 Early Literacy Reporting Instructions**

**2023-25 Early Literacy Reporting Instructions**

RAD Technical Guidance: Instructions on navigating Smartsheet and this dashboard.

Q4 Reporting Video (34 mins) Video for how to report for both the Integrated Programs and Early Literacy Grants for Q4.

2023-24 Folder of Reporting Guidance: Contains a folder for each quarter's reporting that includes additional details on how to report and what to include.

This section is updated on a regular basis to include links to reporting guidance as well as videos walking through what is needed to report.

**2023-25 Early Literacy Reporting Windows**

**2023-25 Early Literacy Reporting Windows**

Early Literacy Success School District Grants:

2023-24 Reporting

- Q3: April 1-30, 2024 (Covers expenditures from 10/1/23-3/31/24, completed within the 2023-24 budget)
- **Q4/Annual: Sept 1- Nov 30, 2024**

2024-25 Reporting

- **Q1: October 1-31, 2024**

This section includes the dates for each quarter's reporting. The current reporting windows are in bold and any changes to reporting windows are communicated out and updated here.

**23-25 ELSSDG Reporting Tracker**

| 23-25 ELSSDG Reporting Tracker | | | | |
|---|---|---|---|---|
| Grantee Name | Reporting Period | Submitted by Grantee for Review | ODE Requested Additional Info | ODE Reviewed and Approved |
| Wooden Spoon SD | Q3 Due: April 30, 2024 | | 03/27/24 | 03/29/24 |
| Wooden Spoon SD | Q4/Annual Due: Nov 30, 2024 | | 9/17/24 | 9/19/24 |
| Wooden Spoon SD | 24-25 Q1 Due: Oct 31, 2024 | | 9/17/24 | 9/19/24 |
| Wooden Spoon SD | 24-25 Q2 Due: Jan 31, 2025 | | 9/17/24 | 9/19/24 |
| Wooden Spoon SD | 24-25 Q3 Due: April 30, 2025 | | 9/17/24 | 9/19/24 |
| Wooden Spoon SD | 24-25 Q4/Annual Due: Nov 30, 2025 | | 9/17/14 | 9/19/24 |

This section displays the dates when reporting was received and approved for each quarter. Reporting that has been reviewed and approved will have a green background.

**2023-25 Early Literacy Completed Reporting Form**



This form is used to indicate that the quarterly reporting for the selected reporting period has been completed and is ready for review by ODE. The included questions change depending on the quarter selected and may include a space to upload attachments.

**Independent Charter Schools**
Charters schools that applied independently for Integrated Programs and Early Literacy Success School District Grants (ELSSDG) will have their own WorkApp and will report in the same way that the district reports as outlined in this document.

**District-Sponsored Partially Administered, Fully Administered and State-Sponsored Charter Schools**
For the 2023-25 jumpstart biennium, there will be no *district sponsored charters*. All charters have applied independently from their district. Charter Schools will report on their own individual reporting dashboards using their link to the Integrated Programs Reporting and Application WorkApp. The charter reporting dashboards will be viewable by the district.

**Consortium**
Integrated Programs consortium will continue as a consortium for Early Literacy Success School District Grants (ELSSDG) and will have their own WorkApp and will report in the same way that the district reports as outlined in this document.

# Integrated Program Plan Changes



## Plan Change Resources



The Plan Change Resources section contains links to resources and indicates who grantee's point of contact is for the plan change process.

## 2025-27 Integrated Programs Plan Change Form



The Integrated Programs Plan Change form is used to request a plan change for outcome and strategies. All asterisked questions require a response. Scroll down in the form to complete and submit.

# LPGT/LOM

The **Longitudinal Performance Growth Targets (LPGT) and Local Optional Metrics (LOM) tab** is the central location where grantees can access resources, guidance, and editable links related to their required LPGTs and any optional LOMs. This tab provides both general resources and grantee-specific links to ensure your metrics are submitted and maintained accurately for the 2025–27 biennium.

## What You Will See on This Tab

LPGT/LOM Resources Panel



This panel provides a list of quick-access links to key documents and webpages, including:

- Instructions for navigating the new LPGT Smartsheets.
- The process for requesting changes to existing LPGTs or LOMs.
- ODE's LPGT Data and Reports website.
- The ODE webpage for resources on setting LPGTs.

## Special Messages



A message box will occasionally highlight important updates. For example, the April 2025 message links to ODE's decision not to co-develop additional LPGTs beyond 2025, with grantees continuing to use targets set in 2023.

## Grantee Specific Links



A dynamic table titled *Integrated Program Grantee LPGT/LOM Links* contains columns for:

- **Grantee Name** – Identifies your district (and charters if applicable), consortium, or ESD.
- **25–27 LPGT Editable Link** – Provides a direct link to your Smartsheet where LPGTs and any optional LOMs are entered or updated.
- **LPGTs Required for 2025** – Shows whether your organization is required to set LPGTs (based on enrollment and other eligibility criteria).

## How to Use the LPGT/LOM Tab

1. **Review Resources:**
   Begin with the links under *LPGT/LOM Resources* to familiarize yourself with the process, reporting expectations, and ODE guidance on setting targets.

2. **Check for Updates:**
   Always read the *Special Message* panel for timely alerts or policy changes that may affect your targets.

3. **Locate Your Grantee Entry & Access the Editable Sheet:**
   Use the *Grantee Name* column to view your organization(s). Then click on the *25–27 LPGT Editable Link* for your organization to open the Smartsheet where you will enter or update your targets.

4. **Confirm Requirements:**
   Use the *LPGTs Required for 2025* column to verify whether your organization is required to submit LPGTs. If "Yes," you must complete this step as part of your Student Investment Account (SIA) grant agreement.

5. **Submit or Update Targets:**
   Complete or revise your LPGTs/LOMs within the editable Smartsheet following the guidance provided. If you need to request changes after submission, follow the process linked under *Resources*.

# 2025-27 Integrated Programs Application



## 2025-27 Intent to Apply Link



The Intent to Apply link section houses the web link where applicants fill out the form demonstrating their intention to apply in the March-April 2025 application window.

## Intent to Apply Submission Tracker

The Intent to Apply Submission tracker section holds a report that shows whether the grantee has submitted an intent to apply form for that entity. It has a green background and shows a date if they have submitted the form.

**2025-27 Integrated Programs Intent to Apply Note**

### 2025-27 Integrated Programs Intent to Apply Note

**2025-2027 Intent to Apply:** The 2025-2027 Intent to Apply is now open through December 2, 2024. If the row in the tracker to the left with your grantee name is red, it means we have yet to receive your intent to apply submission. If it is green, your intent to apply has been received and no further action is needed at this time.

The Intent to Apply Note is a section of text giving instructions on how to use the submission tracker. It will include other instructions and resources as needed.

**2025-27 Application Resources**

### 2025-27 Application Resources

&#x1F517; 2025-27 Budget Codes

&#x1F517; 2025-27 Example Outcomes, Strategies, and Activities

&#x1F517; 2025-27 FTE Type Definitions

The 25-27 Application Resources section includes links to other documents that help applicants navigate the application process. This can include things like budget codes and FTE type definitions.

**2025-27 Budget Note**

### 2025-27 Budget Note

**October 1, 2024 Budget Note:** 2025-26 and 2026-27 preliminary allocations have not yet been calculated. Budgets currently hold the 2024-25 allocation amount as a placeholder and rough estimate of future allocations. Allocation amounts within budgets will be updated as they are available.

25-27 Budget note is in place to alert grantees as to which allocations are included in the 25-27 budgets and when final allocations will be released and updated in the links. For instance, these could be placeholder values using 24-25 allocation amounts, or it could be preliminary allocations or final allocations.

## 25-27 Application Info

**25-27 Application Info**

Until the application formally opens on March 1, 2025, this section houses the 25-27 Budget sheet, the Tiered Planning sheet, and the Outcomes and Strategies sheet for grantees. This allows population and editing of these sheets ahead of the formal application window. Rather than submit an Integrated Planning and Budget Template (IPBT) spreadsheet with applications for 25-27, grantees edit the provided sheets directly.

Since Aligned Program Consortia membership can

This section gives some information about the 25-27 application prep links so that applicants know why this information is already created and available ahead of the application window.

## 25-27 Application Prep Links

**25-27 IP Application Prep Links**

| Grantee Name | Edit or View Link | Link Type | Published Link |
|---|---|---|---|
| Wooden Fork Charter | Editable | 25-27 Budget | https://app.smartsheet.com/b/publish?EQBCT=58f4052a23c24fcfa47b037e9c9f0b9b |
| Wooden Fork Charter | Editable | 25-27 Outcomes and Strategies | https://app.smartsheet.com/b/publish?EQBCT=9e55f60af7514a7e975642114fd673cb |
| Wooden Fork Charter | Editable | 25-27 Tiered Planning | https://app.smartsheet.com/b/publish?EQBCT=55aa2fe7638a438d997b73d34e9fcfa3 |
| Wooden Spoon SD | Editable | 25-27 Budget | https://app.smartsheet.com/b/publish?EQBCT=d377306afb794702992e56e594d7f4f9 |
| Wooden Spoon SD | Editable | 25-27 Outcomes and Strategies | https://app.smartsheet.com/b/publish?EQBCT=504eaa981f2943b2b4129bd1af7aec7e |
| Wooden Spoon SD | Editable | 25-27 Tiered Planning | https://app.smartsheet.com/b/publish?EQBCT=ceaf80e765b4470799e473bebe6895d3 |

Grantees have been given access to some sheets ahead of the application window. This window names the grantee name, the type of link (budget, tiered planning, outcomes and strategies), and the hyperlink to edit these documents. Please note: Making changes to these links does NOT mean that you have submitted an application. These are provided as part of the planning process.

# 2024-25 FSI School Plans

Districts with schools identified for Comprehensive Support and Improvement (CSI) or Targeted Support and Improvement (TSI) will need to submit school-level plans for each identified school for the 2024-2025 school year. The window for these submissions opens April 1, 2024. Districts will be able to access their schools using the 2025-25 FIS School Plans Tab.



## CSI/TSI School Plan Instructions and Resources



The section on the left side of the screen contains technical instructions for submission as well as other resources for districts and schools to assist with their submissions.

## CSI/TSI School Level Plan Reporting



The School Level Plan Reporting section contains your district name and lists all identified schools in your district with the links to the form for submission. Click on any row to open the details tab which will provide you with a copy of each of the narrative responses that have been submitted.

# Troubleshooting

## No access to the WorkApp

## You don't have access to this item

Permission settings are preventing access to the item you requested.
The item also may have been deleted, or the URL may be incorrect.

**Request Access**

This is happening because the account you are logged in as is not associated with any institutions that need access to the WorkApp. First, check to make sure that you are using the email that was provided in the Intent to Apply for this institution. If that does not remedy it, you will need to alert the ODE that you need to be added to the dashboard. Please fill out the contact information update form. Please do not click on the "Request Access" button displayed. Clicking request access will not result in access being granted.

## Empty Boxes

**Application Links and Status**

### You're not shared to this view

You're currently not shared in Dynamic View. Please contact the owner of this dashboard.

**Points of Contact**

### Results are empty

We couldn't find any results based on this report's current criteria.

If you have access to the WorkApp but the information is blank, it means that the ODE didn't correctly get you assigned to your institution(s). Please fill out the contact information update form to gain access. Please describe in the "Additional Information" box that all of the boxes are blank when you log into the WorkApp. This will not be an immediate process to get you access–ODE will need to make a few changes to update. ODE will communicate back to you via email when it is completed and ready.