District of Columbia
Office of the State Superintendent of Education

FY23 USED
ESSER REPORTING

Phase II - LEA Instructional Guide

February 2, 2024

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Overview

Local education agencies (LEAs) are required to complete annual reporting to the United States Department of Education (USED) as a condition of receiving Elementary and Secondary School Emergency Relief (ESSER) funds. This reporting provides transparency to the public on this historic investment as well as important data and information on the ways that funds have been leveraged to support students.

Phase II ESSER Reporting requires LEAs to report detailed expenditure data for **ESSER II and ESSER III** by the following:

Addressing Physical Health and Safety	•Expenditures by Cost Type (Object) •Expenditures by Activity **(NEW)**
Meeting Students' Academic, Social, Emotional and Other Needs (Excluding Mental Health Supports)	•Expenditures by Cost Type (Object) •Expenditures by Activity **(NEW)**
Mental Health Supports for Students and Staff	•Expenditures by Cost Type (Object) •Expenditures by Activity **(NEW)**
Operational Continuity and Other Allowed Uses	•Expenditures by Cost Type (Object) •Expenditures by Activity **(NEW)**
ESSER III ARP Mandatory Requirement	•Expenditures by Activity and Intervention **(NEW)**

- **Examples of Cost Type (Objects):** Salaries, Purchased Property Services, Supplies, Debt Services and Miscellaneous, etc.
- **Examples of Activities:** Cleaning and/or Sanitization Supplies, Hardware and Software, Tutoring, Curriculum, etc.

To streamline the ESSER reporting data collection process, LEAs will use the Qlik Application and Integrated Data Submissions (IDS) Portal. These applications will not only support the data upload but also will provide near real-time data validation and give LEAs insight into data errors instantaneously during the submission process.

Overview of New Reporting Requirements

ESSER Expenditures by Activity

In addition to reporting ESSER expenditures by cost type (i.e., salaries and benefits, purchased property services, supplies, etc.), LEAs are required to report ESSER expenditures by activities (cleaning and/or sanitization supplies, tutoring, curriculum, etc.). **Report each expenditure only once.**

As both the expenditures by cost type and expenditures by activity capture information about the same subgrant expenditures (ESSER II, ESSER III, ESSER III mandatory set-aside), the sum of ESSER expenditures

across cost types must equal the sum across activities for each spending category. For example, total expenditures for Physical Health and Safety for ESSER III across cost types must equal the total expenditures for Physical Health and Safety for ESSER III across activities.

ESSER III Mandatory Requirement

For fiscal year 2023 (FY23) ESSER Reporting, LEAs are required to report expenditures for activities and interventions under the ESSER III mandatory requirement for evidence-based interventions. Data were collected for this reporting category in Phase I of last year's FY22 ESSER Reporting; however, LEAs were only required to report true/false.

Timeline

Feb. 5 – 16, 2024: LEAs will have the opportunity to download their Enterprise Grants Management System (EGMS) reimbursement data from Qlik and upload their reporting data to IDS. LEAs should also review the student enrollment and full-time equivalent (FTE) data in the Qlik App to ensure it reconciles to certified data and submit corrections, if needed. LEA leaders must upload a Phase II template completed with expenditure data in IDS and submit tickets for student enrollment and FTE data by Feb. 16, 2024.

March 11 – 22, 2024: Office of the State Superintendent of Education (OSSE) grant managers will review LEA data and request changes, if necessary. LEAs can expect to receive information about any needed changes via email.

March 25 – April 5, 2024: LEAs will have a final opportunity to upload changes to their expenditure data via the IDS portal and review all data in the Qlik App.

April 8 – April 12, 2024: OSSE grant managers will conduct a final review of corrected data.

April 15, 2024: LEA leaders must certify the data by 5 p.m. on April 15, 2024.

Support

For instructions on how to use the Qlik Application, IDS portal and complete the template, please refer to the ESSER Annual Reporting – Phase II Webinar *in the "Data and Reporting" section of the* ESSER Recovery Funding *webpage.*

If you have issues logging in to the IDS Application Portal*, confirm that your LEA Data Manager has assigned you as the "Finance/Grants Manager" in All Staff IDS. If you need any technical support related to the application, please submit a ticket via the* OSSE Support Tool (OST)*.*

If you have questions or need assistance completing the ESSER Reporting Template after downloading it from the IDS Application Portal*, please contact* OSSE.ESSER@dc.gov*.*

Using the Applications

Logging in to Qlik

OSSE provided Qlik credentials to the person(s) designated as a "LEA Finance/Grant Manager" in All Staff IDS. If you do not have access to these credentials, please confirm that you are assigned as the "Finance/Grant Manager" in All Staff IDS. If you still have questions, please reach out to your LEA's OSSE ESSER grant manager.

Click here to log in to the Qlik Application and be able to view and download spreadsheets with itemized FY23 reimbursements from EGMS.

The Qlik Application

On the landing page, identify the *Streams* dropdown on the left side of the screen. Click the *LEA* button to access the ESSER folder.

Click the *ESSER* folder and it will open to six data spreadsheets:

- Enrollment
- Faculty and Staff
- ESSER II – Salary and Benefits
- ESSER II – All other EGMS spend categories
- ESSER III – Salary and Benefits
- ESSER III – All other EGMS spend categories

This section only focuses on reviewing and using the ESSER spreadsheets. You will refer to the Enrollment and Faculty and Staff sheets in the Student Enrollment and FTE Data Review section. Each ESSER spreadsheet includes the following columns to help you organize each expenditure:

Program Type Code: This column will name the grant, i.e., ESSER II (ESSER II), ESSER_III_ARP (ESSER III).

Evidence-Based Interventions: This column will only be in the ESSER III spreadsheets. This column will indicate if the cost was used to support an evidence-based intervention.

Budget Code: This code represents the EGMS budget code and will be matched under one of the four USED Reporting tool *spending activities*.

EGMS Budget Category: This code represents the EGMS object code and will be matched with the USED reporting tool *cost type*.

Accessing the Expenditure Sheets

To open a spreadsheet, simply click the icon. You may sort each expenditure on this sheet by using the filter in the Qlik App. OSSE recommends downloading the spreadsheet into Excel using the following directions:

1. Click the three dots at the top right corner of the sheet;
2. Click Download As from the dropdown menu;
3. Click Data to export the data. Within seconds, a screen will pop up;
4. Click the hyperlink to download the selected sheet;
5. Click Open File in the top right section to save the sheet to your computer; and
6. Click the right/left arrow to go to the next sheet and repeat these steps until all four sheets have been downloaded to your computer.

Expenditure Pre-Work

Mapping the Expenditures

LEAs must report detailed expenditure data by grant/program, spending categories, cost type, and activities. Please note, the budget codes from EGMS for ESSER II-CRRSA and ESSER III-ARP vary from the spending categories, cost types and activities in the USED reporting document. This section will support LEAs in mapping expenditures from EGMS, using the FY23 expenditure spreadsheets in the Qlik Application to the USED ESSER Phase II reporting template from the IDS portal.

For each table below, the USED column represents the grant name, spending categories, cost type and activities listed on the FY23 ESSER Phase II reporting template in the IDS portal. The Qlik column represents the corresponding taxonomy used in EGMS and its corresponding column in Qlik. Using the method below, LEAs can find all data necessary from their FY23 expenditure spreadsheets and report them accurately on the FY23 ESSER Phase II reporting template.

Step 1: Review FY23 Expenditure Sheets in Qlik and download or filter in Qlik, as preferred. Each LEA's expenditures have been separated onto four sheets.
- ESSER II - Salary and Benefits
- ESSER II – All other EGMS spend categories
- ESSER III – Salary and Benefits
- ESSER III – All other EGMS spend categories

All expenditures have been coded by grant. Use the table below to match USED reporting documents with the grant names listed on the expenditure sheets from Qlik.

USED Grant Name	Qlik (Program Type Code)
ESSER II (CRRSA)	ESSER_II
ESSER III (ARP)	ESSER_III_ARP
ESSER III-ARP Evidence Based Interventions	ESSER_III_ARP + filter on "Evidence Based Interventions" column for anything not labelled "N/A"

Step 2: One Expenditure Sheet at a time, use the table below to sort line items by budget code to align it to the corresponding USED spending category. The below tables are meant to serve as a guide to help you map from the EGMS budget codes in each reimbursement line item to the USED Spending Activity. However, these mappings are not absolute and some EGMS Budget Codes do not have a 1 to 1 relationship with USED Spending Activities. Please review the definition of each Spending Activity from the FY23 Phase II Federal Reporting Webinar to ensure you are categorizing the line items correctly.

EGMS ESSER II-CRRSA and ESSER III-ARP Budget Codes	USED Spending Category
A1 – AIR QUAL	Addressing Physical Health and Safety
A2 – UPGRADE	Addressing Physical Health and Safety
A3 – SUPP STAFF OPS	Addressing Physical Health and Safety
A4 – TEST	Addressing Physical Health and Safety
A5 – SAFE SUPPLIES	Addressing Physical Health and Safety
A6 – SAN SERVICES	Addressing Physical Health and Safety
A7 – HEALTH CONSULT	Addressing Physical Health and Safety
A8 – REOPEN OTHER	Addressing Physical Health and Safety
B1 – PHYS HEALTH AND SUPP	Addressing Physical Health and Safety
B2 – MENT STUDENT	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
	Mental Health Supports for Students and Staff
B3 – MENT STAFF	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
	Mental Health Supports for Students and Staff
B4 – DEVICES	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
B5 – INTERNET	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
B6 – DIGS SERVICES	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
B7 – ADDRESS SPECIFIC NEEDS OTHER	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
	Mental Health Supports for Students and Staff
	Operational Continuity and Other Allowed Uses
C1 – SUPP STAFF INSTR	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C2 – ASSESSMENT	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C3 – CURRICULUM	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C4 – INTERVENTION	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C5 – PROF DEV	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C6 – SUMMER	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C7 – AFTERSCHOOL	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C8 – TUTOR	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
C9 – LL OTHER	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
D1 - OTHER	Addressing Physical Health and Safety
	Meeting Students' Academic, Social, Emotional, and Other Needs Excluding Mental Health Supports
	Operational Continuity and Other Allowed Uses

Step 3: For each spending category, sort each line item in the Expenditure Report by budget category to align it to the corresponding USED cost type using the table as a reference. Note that the mapping is not absolute and some EGMS Budget Categories do not have a 1 to 1 relationship with USED cost type.

EGMS (Budget Category)	USED Cost Type
100 – Salaries and Benefits	Personnel Services – Salaries
	Personnel Services – Benefits
300 – Professional Services	Purchased Professional and Technical
	Other Purchased Services
500 – Equipment	Supplies
600 – Supplies and Materials	
700 – Fixed Property Cost	Property
	Purchased Property Services
800 – Other Objects	Other Purchased Services
	Debt Services and Miscellaneous
	Other Items

LEAs should use their internal formula to split EGMS 100 – Salaries and Benefits expenditures. Ex: If an LEA calculates benefits at 12% of the total salary, then the following calculation would represent the USED reporting expenditure for an employee earning $75,000.
Personnel Services – Salary ($75,000 x .88 = $66,000)
Personnel Services – Benefits ($75,000 – $66,000= $9,000)

The following example compares a properly mapped expenditure from Qlik to the USED reporting tool.

Step 5: Repeat steps 2 to 3 for ESSER II expenditures.

Step 6: Repeat steps 2 to 3 for ESSER III expenditures.

Step 7: Repeat steps 2 to 3 for ESSER III Evidence-Based intervention expenditures. These expenditures will be listed on the ESSER II/III spreadsheets and coded with "1-5" in the Evidence-Based Intervention category to indicate that the expense is related to an intervention.

Totaling the Expenditures

Once expenditures have been mapped, LEAs must total expenditures by spending category, distinguishing the categories by cost type and activities per grant and for ESSER III-ARP evidence-based interventions. **The overall total expenditures for cost type per grant must equal the overall total expenditures for activities per grant.**

Each total will be input on the FY23 ESSER Phase II reporting template in the IDS portal. For more information, please see the Completing the Template section below.

Logging in to IDS

Use your OSSE-provided IDS credentials and click here to log in to the IDS application portal. Once logged in, you will need to accept a confidentiality agreement before you can begin. Please read and accept the privacy policy.
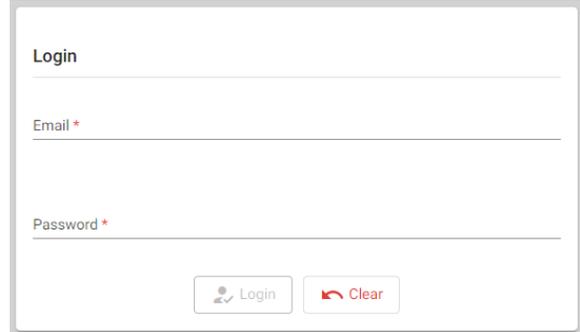
Login

Email *

Password *

Login   Clear

IDS Portal

On the landing page, you may identify the *Entity* you belong to and the *Collection* for which you would like to provide data to the agency.

By default, the *Entity* value will be pre-populated to represent your LEA and the section underneath will highlight all relevant collections that apply to your LEA. You can also use the dropdown icon beside the *Collection* field to select ESSER FY23 Phase II.

Please be mindful of the listed *Due Date* for the collection. **You will not be able to provide data for the collection after Feb. 16, 2024.**
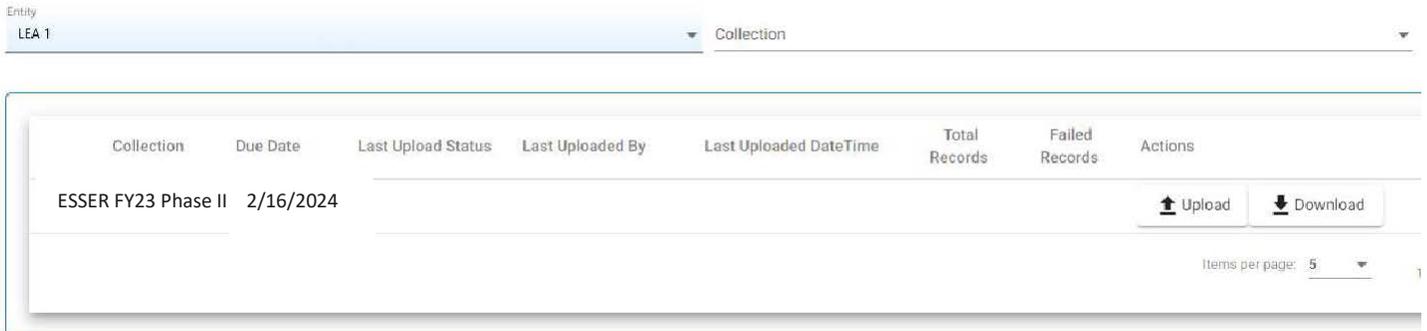
Entity
LEA 1   Collection

Collection	Due Date	Last Upload Status	Last Uploaded By	Last Uploaded DateTime	Total Records	Failed Records	Actions
ESSER FY23 Phase II	2/16/2024						Upload Download

Items per page: 5

Downloading the Template

1. Locate the *Download* button in the ESSER FY23 Phase II collection row and click it.
2. Select *Template*. The ESSER FY23 Phase II Template workbook will download to your computer.
3. Open the file. Review the tabs and fields listed in the workbook.
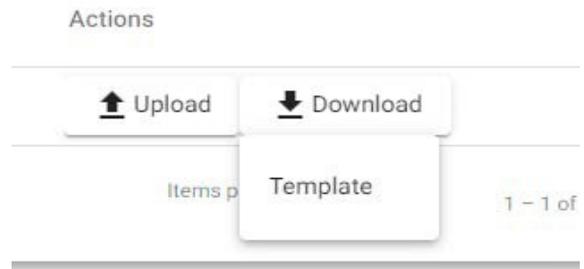
> Refer to the <u>Definitions</u> and <u>Permitted values</u> columns on the *Data Elements Definitions tab* to review the descriptions for each field. Please enter numbers up to two decimal places.

Completing the Template

ESSER Expenditures by Cost Type

Each red heading in this section corresponds to the spending categories on the FY23 ESSER Phase II reporting template. Each section includes screenshots and directions on how to complete that section. All fields are mandatory and require a response.

Input all responses into the template as follows:

Grant	Row
ESSER I (CARES)	7
ESSSER II (CRRSA)	8
ESSER III (ARP)	9
ESSER III (ARP) mandatory set-aside to address learning loss	10

Addressing Physical Health and Safety

For each cost type, enter the total amount the LEA expended on each grant to address physical health and safety during fiscal year 2023 (FY23) from Oct. 1, 2022–Sept. 30, 2023.

Meeting Students' Academic, Social, Emotional, and Other Needs (Excluding Mental Health Supports)

For each cost type, enter the total amount the LEA expended on each grant to meet students' academic, social, emotional, and other needs (excluding mental health) during FY23.

	Total Amount Expended by Activity								
	Meeting Students' Academic, Social, Emotional, and Other Needs (Excluding Mental Health Supports)								
	k. Personnel Services – Benefits	l. Purchased Professional and Technical Services	m. Purchased Property Services	n. Other Purchased Services	o. Supplies	p. Property	q. Debt Service and Miscellaneous	r. Other Items	Amount Expended on Mental Health Supports for Students and Staff
	Student Needs Benefits	Student Needs Professional Technical Services	Student Needs Property Services	Student Needs Other Purchased Services	Student Needs Supplies	Student Needs Property	Student Needs Debt Service	Student Needs Other	
	Required	Required	Required	Required	Required	Required	Required	Required	<auto-calc: SUM(Y:AG)>
	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric
									0
									0
									0

Mental Health Supports for Students and Staff

For each cost type, enter the total amount the LEA expended on each grant for mental health supports for students and staff during FY23.

	Mental Health Supports for Students and Staff								
	t. Personnel Services – Benefits	u. Purchased Professional and Technical Services	v. Purchased Property Services	w. Other Purchased Services	x. Supplies	y. Property	z. Debt Service and Miscellaneous	aa. Other Items	Amount Expended on Operational Continuity and Other Allowed Uses
	Mental Health Support Benefits	Mental Health Support Professional Technical Services	Mental Health Support Property Services	Mental Health Support Other Services	Mental Health Support Supplies	Mental Health Support Property	Mental Health Support Debt Service	Mental Health Support Other	
	Required	Required	Required	Required	Required	Required	Required	Required	<auto-calc: SUM(AI:AQ)>
	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric
									0
									0
									0

Operational Continuity and Other Allowed Uses

For each cost type, enter the total amount the LEA expended on each grant for operational continuity and other allowed uses during FY23.

	Operational Continuity and Other Allowed Uses								
	bb. Personnel Services – Salaries	cc. Personnel Services – Benefits	dd. Purchased Professional and Technical Services	ee. Purchased Property Services	ff. Other Purchased Services	gg. Supplies	hh. Property	ii. Debt Service and Miscellaneous	jj. Other Items
	Operational Continuity Salaries	Operational Continuity Benefits	Operational Continuity Professional Technical Services	Operational Continuity Property Services	Operational Continuity Other Purchased Services	Operational Continuity Supplies	Operational Continuity Property	Operational Continuity Debt Service	Operational Continuity Other
	Required	Required	Required	Required	Required	Required	Required	Required	Required
	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal	Numeric (2 decimal places)

Planned Uses of Remaining Funds

For each grant, enter the percentage of the remaining funds the LEA plans to expend on each spending activity. You may enter up to two decimal places.

	Planned Uses of Remaining Funds (% of Remaining Funds) Note: Categories must sum to 100%			
% Remaining Funds Planned for Addressing Physical Health and Safety	% Remaining Funds Planned for Meeting Students' Academic, Social, Emotional, and Other Needs (Excluding Mental Health Supports)	% Remaining Funds Planned for Mental Health Supports for Students and Staff	% Remaining Funds Planned for Operational Continuity and Other Uses	% Remaining Funds Not Planned for Specific Us
% Remaining Funds Planned for Addressing Physical Health and Safety	*% Remaining Funds Planned for Meeting Students' Academic, Social, Emotional, and Other Needs*	*% Remaining Funds Planned for Mental Health Supports for Students and Staff*	*% Remaining Funds Planned for Operational Continuity and Other Uses*	*% Remaining Funds Not Planned for Specific Us*
Required	Required	Required	Required	Required
Numeric (2 decimal places)	Numeric (2 decimal places)	Numeric (2 decimal places)	Numeric (2 decimal places)	Numeric (2 decimal place

LEAs should only input responses for ESSER I (row 7), ESSER II (row 8), and ESSER III (row 9). The total for each grant must equal 100.

ESSER Expenditures by Activity (New)

Each red heading in this section corresponds to the spending categories on the FY23 ESSER Phase II reporting template. Each section includes screenshots and directions on how to complete that section. All fields are mandatory and require a response.

Input all responses into the template as follows:

Grant	Row
ESSER I (CARES)	7
ESSSER II (CRRSA)	8
ESSER III (ARP)	9
ESSER III (ARP) mandatory set-aside to address learning loss	10

Addressing Physical Health and Safety

For each activity, enter the total amount the LEA expended on each grant to address physical health and safety during fiscal year 2023 (FY23) from Oct. 1, 2022–Sept. 30, 2023.

Addressing Physical Health and Safety				
a. Building and facilities upgrades and maintenance, including ventilation systems and new construction	b. Assistance with meals for students	c. Cleaning and/or sanitization supplies	d. Temporary classroom space to support social distancing	e. Temporary or additional transportation services to support social distancing to and from school
Building Upgrades	Assistance with meals	Cleaning supplies	Temporary classroom space	Additional Transportation
Required	Required	Required	Required	Required
Numeric	Numeric	Numeric	Numeric	Numeric

Meeting Students' Academic, Social, Emotional, and Other Needs (Excluding Mental Health Supports)

For each activity, enter the total amount the LEA expended on each grant to meet students' academic, social, emotional, and other needs (excluding mental health) during FY23.

Meeting Students' Academic, Social, Emotional, and Other Needs (Excluding Mental Health Supports)				
h. Extended learning and/or summer learning	i. Tutoring	j. Additional staffing and/or activities to identify and/or respond to unique student needs and/or provide targeted support for underserved student groups, including each major racial and ethnic group, children from low-income families, children with disabilities, English learners, LGBTQ+ students, migratory students, students experiencing homelessness, youth in foster care, and other groups disproportionately impacted by the pandemic	k. Universal screening, academic assessments, and intervention data systems, such as early warning systems and/or opportunities to learn data systems	l. Improved coordination of services for students with multiple types of needs, such as full-service community schools or improved coordination with partner agencies, such as the foster care services
Extended Learning	Tutoring	Additional Staffing	Universal screening	Additional services for students with needs
Required	Required	Required	Required	Required
Numeric	Numeric	Numeric	Numeric	Numeric

Mental Health Supports for Students and Staff

For each activity, enter the total amount the LEA expended on each grant for mental health supports for students and staff during FY23.

Mental Health Supports for Students and Staff	
Amount Expended on Mental Health Supports for Students and Staff	s. Additional staffing and/or activities to assess and support social-emotional well-being, including mental health, for students, educators and/or families
MH Total Expended Amt	Additional Staffing for Mental Health
<Direction: SUM(Y:Y)>	Required
Numeric	Numeric

Operational Continuity and Other Allowed Uses

For each activity, enter the total amount the LEA expended on each grant for operational continuity and other allowed uses during FY23.

	Operational Continuity and Other Allowed Uses				
t. Any activity not described above that is authorized by the McKinney-Vento Homeless Assistance Act	u. Any activity not described above that is authorized by the Elementary and Secondary Education Act of 1965	v. Any activity not described above that is authorized by the Individuals with Disabilities Education Act	w. Any activity not described above that is authorized by the Adult Education and Family Literacy Act	x. Any activity not described above that is authorized by the Carl D. Perkins Career and Technical Education Act of 2006
McKinney-Vento Homeless Assistance	Additional ESEA Activities	Additional IDEA Activities	Additional AEFLA activites	Additional CTEA Activities
Required	Required	Required	Required	Required
Numeric	Numeric	Numeric	Numeric	Numeric

ESSER III Mandatory Requirement (New)

Mapping the Expenditures

This section will support LEAs in mapping expenditures from EGMS, using the FY23 expenditure spreadsheets in the Qlik Application to the USED ESSER Phase II reporting template from the IDS Portal. LEAs must report detailed expenditure data for the ESSER III mandatory requirement. Please note, the budget codes from EGMS for ESSER III-ARP vary from the mandatory categories for ESSER III-ARP in the USED reporting document.

For the table below the USED column represents the ESSER III-ARP mandatory categories listed on the FY23 ESSER Phase II reporting template in the IDS portal. The EGMS budget code column represents the corresponding taxonomy used in EGMS and expenditures in Qlik. Using the method below, LEAs can find all data necessary from their FY23 expenditure spreadsheets and report them accurately on the FY23 ESSER Phase II reporting template.

Step 1: Review FY23 Expenditure Sheets in Qlik and download or filter in Qlik, as preferred. Each LEA's expenditures for ESSER III-ARP have been separated into two sheets.

- ESSER III – Salary and Benefits
- ESSER III – All other EGMS spend categories

Step 2: Filter the "Evidence Based Intervention" column the Qlik data, for "1-5" and "Other." This filter will populate all expenditures linked to the ESSER III Mandatory Requirement.

Step 3: Use the table below to sort line items by budget code to align it to the corresponding USED ESSER III mandatory category. The below table is meant to serve as a guide to help you map from the EGMS budget codes in each reimbursement line item to the USED ESSER III mandatory category. However, these mappings are not absolute and some EGMS budget codes do not have a 1 to 1 relationship with USED spending activities.

EGMS Budget Codes	USED ESSER III Mandatory Category
C6 – SUMMER	Summer learning or summer enrichment
C7 – AFTERSCHOOL	Afterschool programs
	Extended Instructional Time
C8 – TUTOR	Tutoring
C1 – SUPP STAFF INSTR	Additional classroom teachers, and other additional staffing
C4 – INTERVENTION	Other additional staffing and/or activities to assess and support social-emotional well-being **(excluding mental health supports)**, for students, educators and/or families
B2 – MENT STUDENT	Other additional staffing and/or activities to assess and support mental health needs, for students, educators and/or families

B3 – MENT STAFF	
C1 – SUPP STAFF INSTR C5 – PROF DEV	Other additional staffing and/or activities to identify and/or respond to unique student needs and/or provide targeted support for vulnerable students (including low-income children or students, students with disabilities, English learners, racial and ethnic minorities, students experiencing homelessness, and children and youth in foster care)
C2 – ASSESSMENT	Universal screening, academic assessments, and intervention data systems, such as early warning systems and/or opportunity to learn data systems.
D1 – OTHER	Improved coordination of services for students with multiple types of needs, such as full-service community schools or improved coordination with partner agencies, such as foster care services
C1 – SUPP STAFF INSTR C3 – CURRICULUM C5 – PROF DEV	Early childhood programs
C3 – CURRICULUM	Curriculum high-quality instructional materials and curriculum for all students
C5 – PROF DEV	Core staff capacity building/training to increase instructional quality and advance investments in talent pipelines for teachers and/or classified staff

After mapping the ESSER III Mandatory expenditures, complete the FY23 ESSER Phase II reporting template according to each red heading in the sections below. Each section includes screenshots and directions on how to complete that section. All fields are mandatory and require a response.

Amount expended from the ARP ESSER LEA Reserve

For each activity, enter the total amount the LEA expended using its FY23 ESSER III ARP funds to satisfy the mandatory 20 percent set-aside for evidence-based interventions during FY23.

Impact Statement

For the activities or interventions, the LEA implemented using its FY23 ESSER III ARP funds for the mandatory 20 percent set-aside for evidence-based interventions, please describe how these activities or interventions addressed the disproportionate impact of COVID-19 on underserved groups.

		Impact
1 2		
3		Please describe how the selected activities or interventions that the LEA implemented to satisfy the LEA's mandatory 20% set-aside requirements for ESSER III-ARP funds respond to students' academic, social, and emotional needs. Please describe how these activities or interventions address the disproportionate impact of COVID-19 on each listed underserved student groups, including each major racial and ethnic group, children from low-income families, children with disabilities, English learners, migratory students, students experiencing homelessness, youth in foster care, and other groups disproportionately impacted by the pandemic that have been identified by the SEA.
4		ESSER_IOI COVID Impact Statement
5		Required
6		Open Text (More than 10 and less than 3000 characters)
7		

Uploading the Data

Save the completed workbook template as an Excel spreadsheet on your computer. On the main landing page of the application, locate the *Upload* button in the row for the FY23 ESSER Phase II Reporting collection.

1. Click the upload button and upload the saved file from your computer.
2. The application will then display a window requesting the user to confirm the import.
3. Type IMPORT in the given field and click *OK.*
4. The application will then run a data validation process on the data in the template.
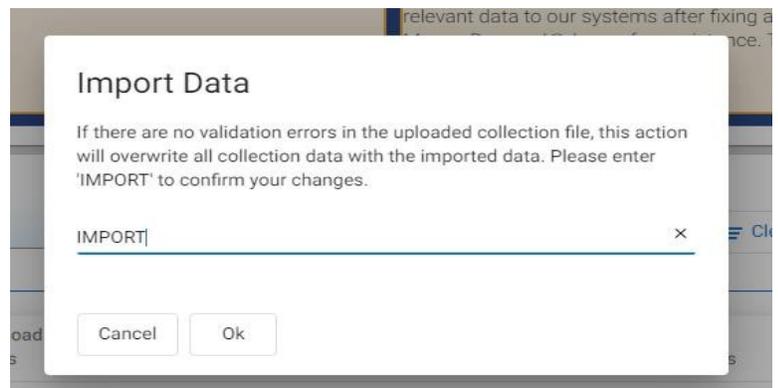
Note: Once the data is imported it will overwrite all existing data for that collection.

If the upload is successful, the application will display the Message "*File Submitted. Status will be updated soon.*" It may take up to 2 minutes to upload the data. If there are no errors, the *Last Upload Status* will reflect "Success" along with a green check at the beginning of the row to reflect a successful data upload with 0 errors.

	Collection	Due Date	Last Upload Status
✅	ESSER FY23 Phase II		Success

If there are errors in the data validation, the *Last Upload Status* will indicate "Failure" along with number of errors in parenthesis and a red warning symbol at the beginning of the row. Please see the section below, Resolving Errors,

	Collection	Due Date	Last Upload Status
❗	ESSER FY23 Phase II	1/26/2024	Failed (7 Errors)

for instructions on how to edit the template and
resubmit.

Resolving Errors

To view what data within the file triggered errors, click on the *Download* button again and select *Last Result File*.

The application will download the most recently uploaded file.

1. Open the file and scroll to the right on each sheet until you reach the column that describes the individual errors.
2. Review the individual errors on each sheet.
3. Resolve the errors and ensure that all cells have allowable responses. Refer to the *Required* and *Permitted values* columns and on the *Data Elements Definitions* tab.
4. Save the file and upload the data file in the application again.

Error descriptions may remain until you upload the new template with corrections. This upload will overwrite all existing collection data and resolve all errors or show any errors that remain.

Viewing Historical Uploads

After you have uploaded a data file at least one time, the application will provide you with a *View History* button for that particular collection. Click on the button and the application will display a window with all upload attempts. Every time you upload a data file for the collection, the upload efforts will be logged in and can be viewed via this window, along with who initiated the upload.

To view a file that was uploaded, click the *Download* button and select *Uploaded File.* Likewise, in order to view the file after it was validated by the application after each upload attempt select the *Result File*.
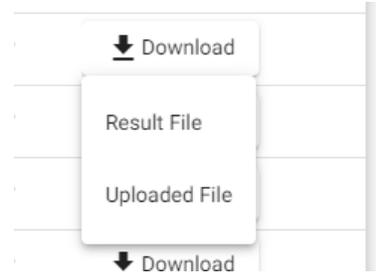
Student Enrollment and FTE Data Review

Log in to the Qlik Application and select the "Enrollment" sheet and then the "Faculty and Staff" sheet to review the LEA's student enrollment and faculty and staff data that will be submitted as a part of the ESSER reporting to USED. The numbers in these sheets should reconcile to the certified data that the LEA has previously submitted to OSSE. If they do not match the previously certified data, *you must submit a ticket via the OSSE Support Tool* to have the data in Qlik updated.