Chartering System
User Manual

Ohio Department of Education & Workforce

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Accessing the Chartered Nonpublic System

Setting up an OH|ID Account

To access and use the chartering application system, the user must have an account set up on the OH|ID web portal and request access to the Chartered Nonpublic app.

To obtain an OH|ID account, please click the link: OH|ID Account.
For more instructions or troubleshooting, click here: OH|ID Guides & Job Aid Repository | OH|ID | Ohio's State Digital Identity Standard
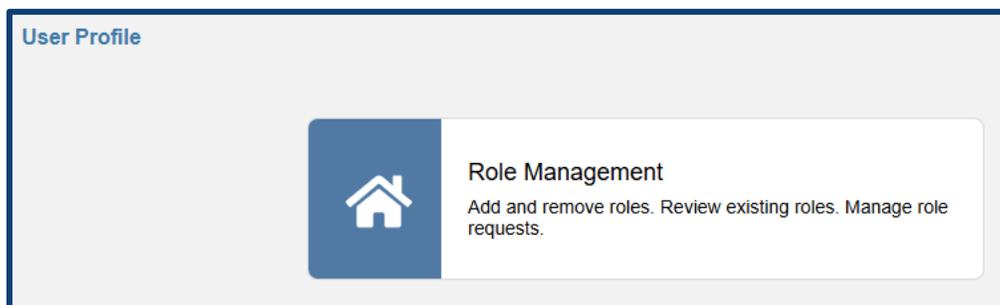
Accessing the Chartered Nonpublic Application

To access the Chartered Nonpublic app, a new applicant must first be granted access. Please follow these steps to obtain access to the Chartering Application:

1. Sign into your OH|ID account
2. Select the **App Store** and find the "Department of Education & Workforce Application Request" tile
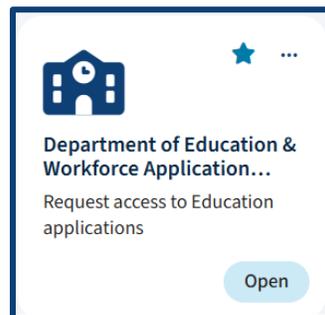
3. This will take you to the User Profile page.

4. Selecting "Role Management" tile will take you to your Personal Role Management page.

5. Click on the "Request New Role" tile (see arrow above). Below is the next screen you will see.

Please choose the following items under each category:

Select Role Groups: "Roles not related to any specific organization"

Request New Role: Choose "Select Role Directly" and "Nonpublic Charter Applicant" from the dropdown menu

Reason for requesting the role: Enter a comment in the box indicating interest in chartering a nonpublic school.

6. Once the information has been entered, click the "Add Role(s) to Cart" button (see arrow above).

7. The role request has been added to the cart. Click on the "Submit Role Request" button to complete the request.

NOTE: Each role request must be manually approved by our office. Please allow 1-2 business days for the request to be approved.

NOTE: The person who requests access to this application for a particular school is the **_ONLY_** person that will be able to make changes, submit documentation, and otherwise communicate through the charter system until the chartering process is complete. In the event this person leaves the organization, please contact the chartering team.

Selecting the Chartered Nonpublic System

Once access has been granted, the Chartered Nonpublic application tile should be listed in your OH|ID account.

Department of Education & Workforce
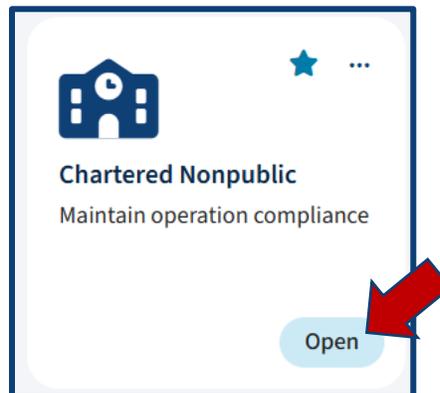
1. Select the Chartered Nonpublic program by clicking on the three bars to the left of Select Program.

2. Choose Chartered Nonpublic.
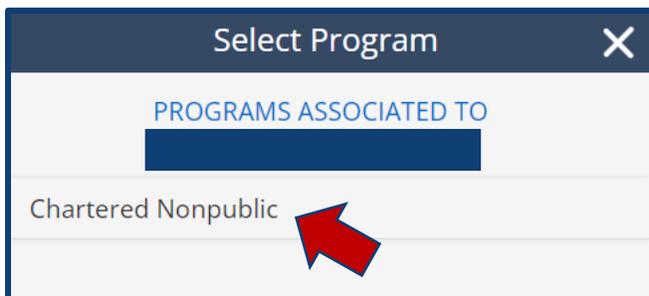
Creating the School Profile

1. Once in the chartering system, click on the Provider tab in the red ribbon at the top of the screen.

2. From the dropdown, choose New Charter Application.
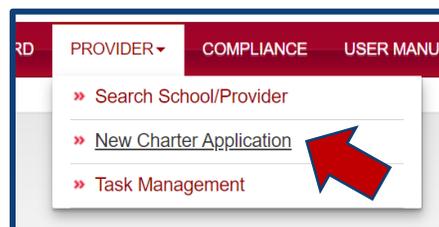
3. Check the box that states *I have read and agree to the terms and conditions outlined in the Affidavit of Intent Not to Discriminate.* This indicates that you have watched the tutorial, understand the requirements of a chartered nonpublic school and know that your school will be listed in the Ohio Educational Directory System.

New Charter Application

☑ By checking this box I have read and agree to the terms and conditions outlined in the Affidavit of Intent Not to Discriminate.

Please review it carefully and verify that you are compliant in all areas before continuing your charter application.

    1. All Service Providers are listed in The Ohio Educational Directory System (OEDS). If your organization is already listed in OEDS and you have the proper associated role you will see your organization in the dropdown list below. Select your organization and click on START APPLICATION. After your data appears, click SUBMIT.

    2. If you are a school or past provider and your organization does not appear in the dropdown please check with your OEDS administrator to assure you have the correct role.

    3. If your organization is new and is not currently listed in OEDS, begin by selecting Create a New Org/Provider from the drop down list and click on START APPLICATION. Then, fill out the general information on the screen below and press SUBMIT. You will be issued an IRN (Information Retrieval Number - which is used as a unique identifier for your organization) upon application approval.

Start application by: Selecting an Organization you are associated with from the drop down or select "Create a New Org/Provider" then press Start Application.

Associated Orgs: Create a New Org/Provider ⌄

[Start Application]

NOTE: An Information Retrieval Number (IRN) will not be assigned to your school until the Initial Charter is issued.

4. Click on the blue **Start Application** button.

5. Next, enter the Organization Information, including the Physical and Mailing Addresses.

NOTE: If the school address or other contact information changes during the chartering process, it will not be able to be updated in the system. You will work directly with the Office of Nonpublic Education Options and the update will occur when the Initial Charter is issued and the school is updated in OEDS.

6. Once all information has been entered, click the blue **Submit** button.

City

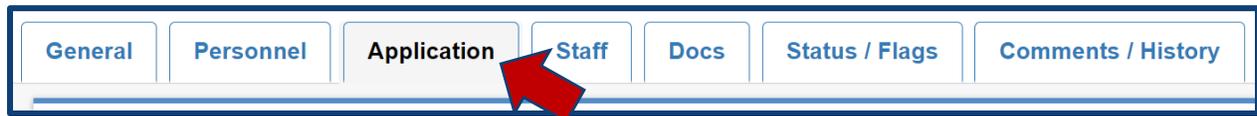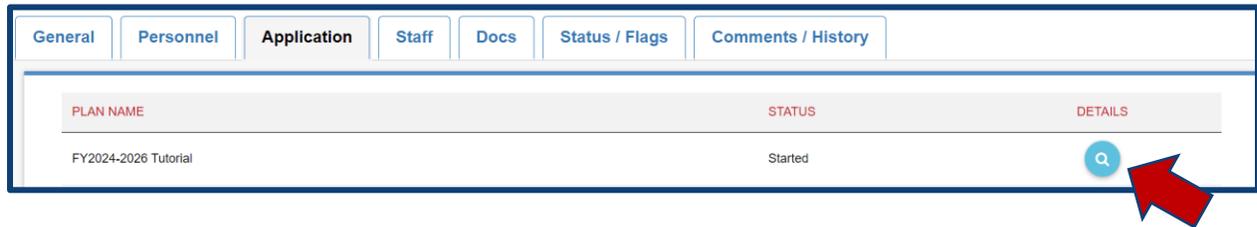   Some City

*State

    OH   ⌄

*Zip

(00000)

*Required Fields

[Submit]

Ohio Department of Education & Workforce

Starting the Application

1. Click on the **Application** tab.

| General | Personnel | Application | Staff | Docs | Status / Flags | Comments / History |

2. Click on the **magnifying glass** on the Tutorial line.

| General | Personnel | Application | Staff | Docs | Status / Flags | Comments / History |

PLAN NAME	STATUS	DETAILS
FY2024-2026 Tutorial	Started	🔍

3. Answer the questions about the information covered in the tutorial.

4. Once the questions have been answered, click **Save**. (Click **Reset** if you would like to start over).

5. Click the blue **Submit** button under the Sections box on the left.

Tutorial

Submit

Export to P...

» Question 6

** Once the final charter is received, schools must notify the Departme... change of ownership, adding grades, changing location, or changing their...

● Yes ○ No

< Previous   👍 Save ...el
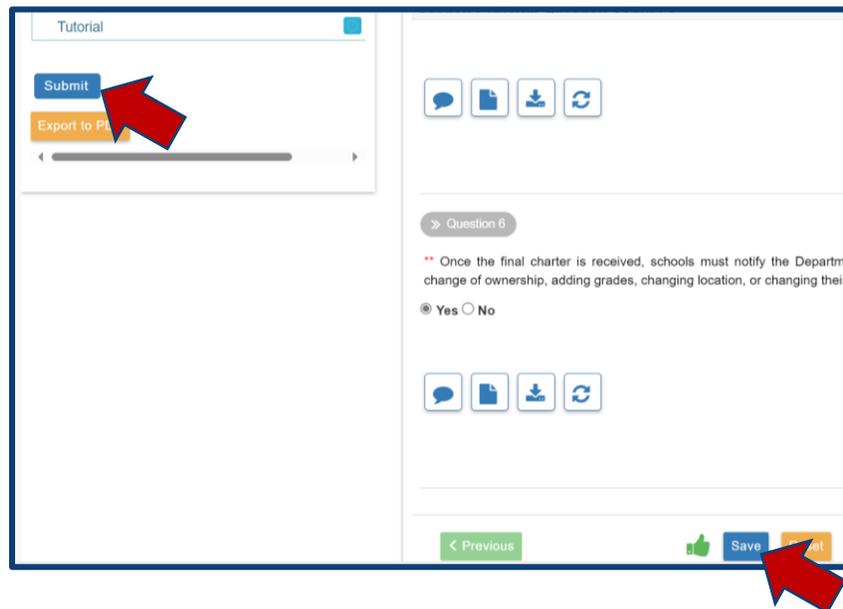
6. You will receive a pop-up box that states *the survey is now in submitted status.* To alert the chartering team that the tutorial survey has been submitted, go to the **Status/Flags** tab.

| General | Personnel | Application | Staff | Docs | Status / Flags | Comments / History |

Ohio Department of Education & Workforce
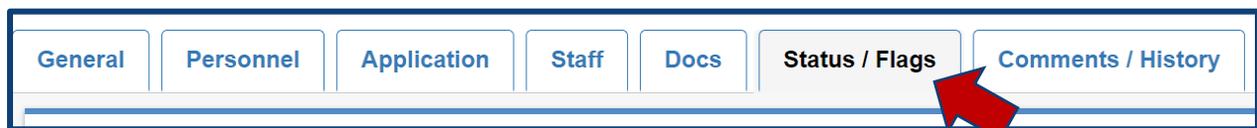
7. Change the status to "Intent Submitted" by clicking on it.
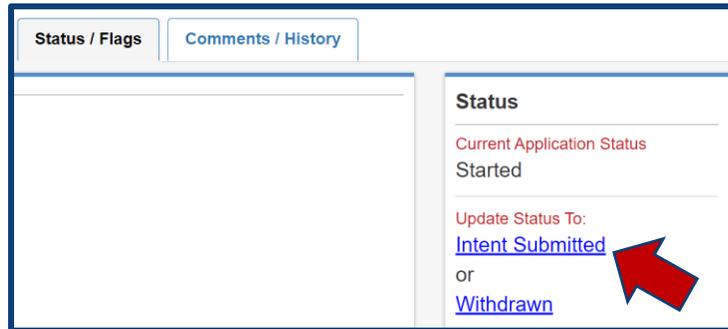
The chartering team will review the tutorial survey. If all answers are correct, the status will be updated to "Intent Review Completed". If any answers are incorrect, it will be updated to "Intent Correction Needed" and you will need to correct your answers, save, submit, and update the status under **Status/Flags** to "Intent Resubmitted".

Uploading Documents

After your tutorial/survey has been completed and reviewed, you may begin uploading documents that are required for the chartering process.

1. Click on the **Docs** tab.
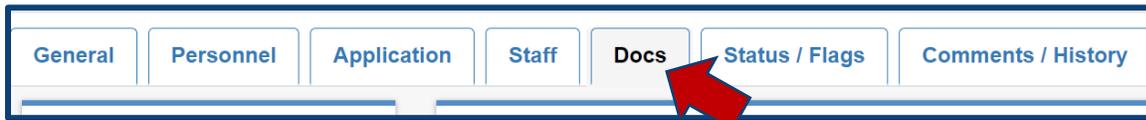
2. Under the **Docs** tab there is a list of documents that must be uploaded.

NOTE: The chartering team is responsible for uploading:

- *"Begin POC for Charter"* document (after the Affidavit of Intent and Nondiscriminatory policy have been submitted and approved)
- *Initial Charter Letter* (provided after the first site visit and all requirements have been met)
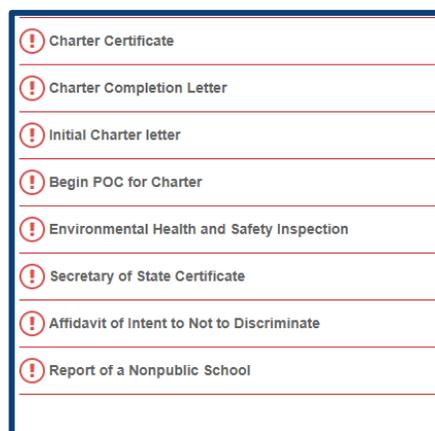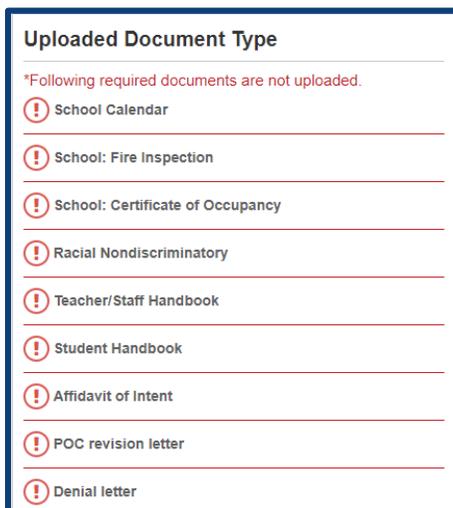- *Charter Completion Letter* (provided after the second site visit and when all chartering paperwork has been processed)
- *Charter Certificate* (provided at the same time as the Charter Letter)
- *Denial Letter* (if applicable – only provided if the school is not able to be chartered)

3. The first document needed is the *Affidavit of Intent*. This document can be found under the User Form and Manuals tab in the chartering system or on our website. **NOTE**: The *Affidavit of Intent* document must be notarized before it is uploaded to the system.

4. To upload the document, click **Upload Documents**.
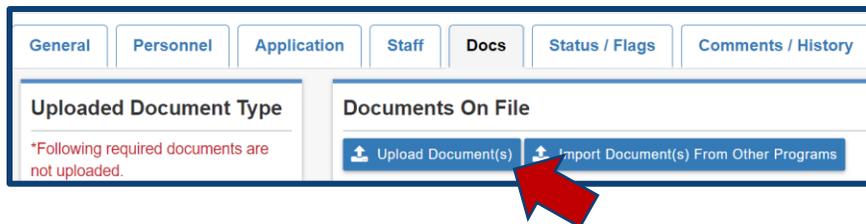
5. Select the document type from the drop down.
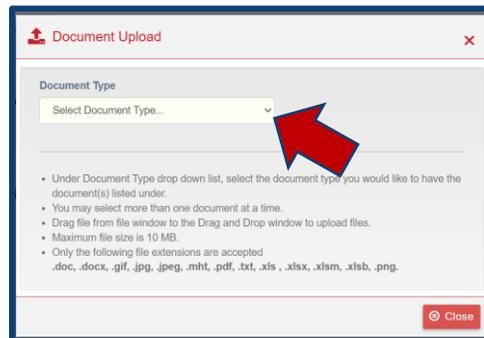
6. Choose your file or drag it into the box. Once the file is uploaded, click the **Close** button. The document will appear in the document bank once it is uploaded.
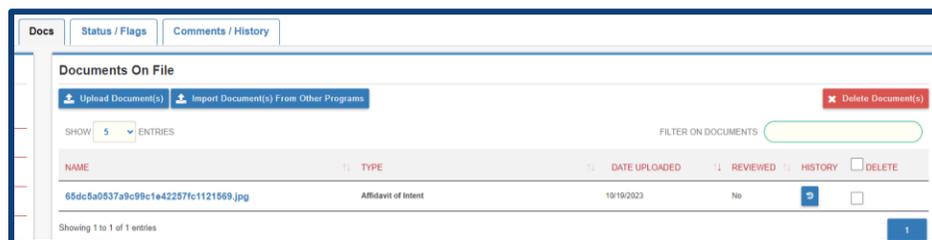
7. Next, upload a copy of the school's *Racial Nondiscriminatory Policy* that has been completed on school letterhead. See the *Racial Nondiscriminatory Policies* document under the User Manual and Forms tab or on our [website](#) for the language that must be included.

8. Once this document and the *Affidavit of Intent* have been uploaded, go to the **Status/Flags** tab and change the status to "RND Submitted" to alert the chartering team that it has been entered.

   NOTE: You will not be able to submit your Plan of Compliance until these documents have been reviewed. However, you can still upload other documents under the Docs tab.

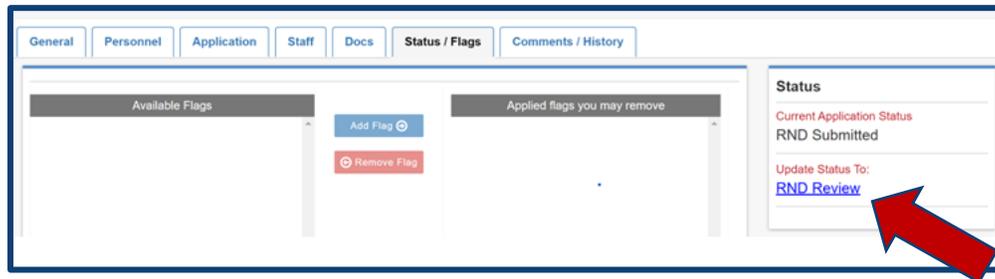The *Affidavit of Intent* and *Racial Nondiscriminatory Policy* will be reviewed by the chartering team and the status will be updated to "RND Review." Once the documents are approved, a letter to "*Begin the Plan of Compliance (POC)*" for chartering will be uploaded by the chartering team and the status for the school will be changed to "RND Completed."

At this point, all other documents can be uploaded for review if you have not already done so.

NOTE: The school will also need to register with the Ohio Secretary of State if it has not or is not connected to another organization that is registered: https://www.ohiosos.gov/businesses/. Once registration is completed, upload the *Secretary of State Certificate* under the **Docs** tab.

Plan of Compliance

The Plan of Compliance consists of information on how the school plans to meet the Operating Standards including their governance model, procedures for operation and an outline of the curriculum the school will use.

To submit your Plan of Compliance, go to the **Application** tab and click on the **magnifying glass** for Plan of Compliance.
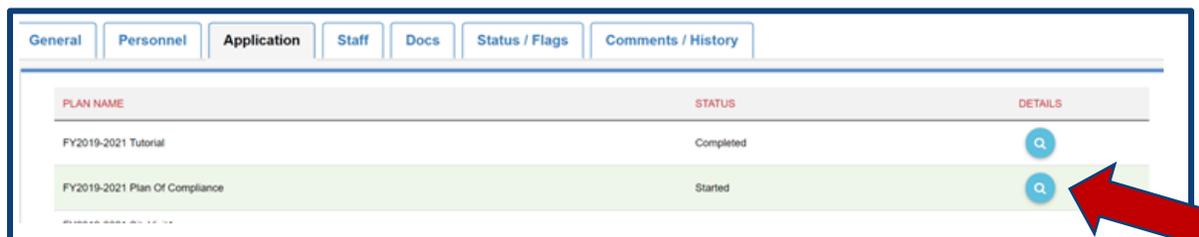
1. Answer the questions and upload or denote documents as requested. All questions and uploads do not have to occur at once. You may put the Plan of Compliance **In Progress** by clicking on the blue button in the box to the left of the questions, illustrated below.

2. Once all questions have been answered and documents uploaded, click the **Save** button and then **Submit.**

3. Email the chartering team at chartered.nonpublic.schools@education.ohio.gov to notify that you have completed and submitted the POC for review.

The Plan of Compliance will be reviewed and placed in "POC Submitted" status. If any updates or changes are required, the chartering team will upload a letter detailing the revisions needed in the chartering system, place the application in "POC Correction Needed" status and send an email to the school. It typically takes 60-90 days for a Plan of Compliance to be reviewed. During this time, the school can upload any remaining documents and provide all other necessary forms and handbooks.

NOTE: All documents including a fire inspection, environmental health and safety inspection, and final certificate of occupancy permit must be uploaded and approved before any site visits can occur.

HELPFUL TIPS FOR SUBMITTING YOUR PLAN OF COMPLIANCE (POC)

- Please date the first page at minimum
- Address all rules 3301-35-01 through 3301-35-07 and 3301-35-09
- Try to be as detailed and consistent as possible. This will reduce the need for revision to your school's POC.
- If information is included in one of your Handbooks, you may reference the page number of the Handbook where the information can be found to avoid having to enter duplicate information.
- Documents to upload with the POC:
  - A roster of the school's board members (Upload in POC under the Application tab)
  - Identify the school's principal (Enter in the Staff tab)
  - Parent/Student handbook (Upload under the Docs tab)
  - Employee/Staff handbook (Upload under the Docs tab)
  - School's curriculum, which must provide the scope and sequence
  - School hours (if not in Parent/Student Handbook, include with school calendar)
  - School calendar of student days (Upload under the Docs tab)
    - Identify dates for parent/teacher conferences and
    - professional development/in-service dates.

Department of Education & Workforce

Site Visits

Prior to the First Site Visit

The school should register with Ohio Shared Services:
https://obm.ohio.gov/wps/portal/gov/obm/areas-of- interest/ohio-suppliers/supplier-forms/
This information can also be found under the User Manual and Forms link in the red ribbon at the top of the screen.

First Site Visit

Once all documentation has been completed, the first site visit will be scheduled. During this visit the chartering team will tour the school building, answer any questions the school may have, and review staff and student files. A checklist of what should be included in the files can be found under the User Manuals and Forms tab in the chartering system. As a reminder, teachers who do not currently hold a license or certificate will not be able to receive one until after the initial charter is issued. We understand a license/certificate document may be missing from some staff files during the first site visit.

If there are any items that need to be addressed with the school facilities or operating procedures, the chartering team will communicate with the school and will make a note of those items in the chartering system under "site visits". These items will need to be in compliance with the Ohio Operating Standards and/or building codes before the second visit.

After the first visit is completed, the school's application will be placed under "Initial Charter" status. A copy of the Initial Charter letter will be sent to the school and uploaded into the chartering system. The school will be assigned an IRN and will operate for at least 60-90 school days before the second site visit is scheduled.

NOTE:
- During this time, the school may be contacted by the State of Ohio Homeland Security office to develop and submit safety plans.
- Students may be able to receive transportation services or a transportation stipend from their district of residence.

Prior to the Second Site Visit
- **Within 10 days** from the date the initial charter is issued, a school can choose to have their auxiliary funding sent directly to them. You will receive the *Election for Direct Payment* form with your Initial Charter Letter. If you do not receive the *Election for Direct Payment* form, please contact the chartering team immediately at chartered.nonpublic.schools@education.ohio.gov.
- The document *Report of a Nonpublic School* will need to be prepared and uploaded **before the second site visit**. This form can also be found under the User Manual and Forms tab in the chartering system. Please provide a hard copy of the Report of a Nonpublic School at the second site visit. **NOTE**: The Report of a Nonpublic School must be notarized.
- All staff must be properly credentialed for their roles in the school **before the second site visit**.

Second Site Visit

The second site visit is the final step in chartering your school. This visit will include another tour of the building and a review of staff and student files. Any questions or concerns can be addressed during this visit. Documentation from the visit will be uploaded into the chartering system.

Once a successful second visit is complete, the school will be considered fully chartered. A copy of the charter letter will be sent to the school as well as uploaded in the chartering system. The school's status will be updated to "Charter Completed" in the system.

Questions?

Please contact the Office of Nonpublic Educational Options with any questions regarding the chartering process at: 614-728-2678 or chartered.nonpublic.schools@education.ohio.gov .