Title IV, Part A, Special Data Collection – Expenditures

SMARTSHEET WORKAPP DATA SUBMISSION INSTRUCTIONS

EVERY STUDENT SUCCEEDS ACT (ESSA)

Federal Program Compliance (FPC) Division
ESSAsupport@TEA.Texas.gov

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WorkApp Access

Please note that the School System and/or ESC staff submitting data will need access to the Department of Grant Compliance and Administration WorkApp.

To add or change the individuals with access to the WorkApp, someone with existing access must request access for the new individual via the Help Form in the Federal Program Compliance Division (FPC) WorkApp. The additional staff to be added to the system must agree to certain security requirements.

Currently, the superintendent, chief financial officer, and federal program director listed in AskTED have been given access to the WorkApp.

NOTE: At the present time, each School System or ESC is only guaranteed a certain number of access accounts.

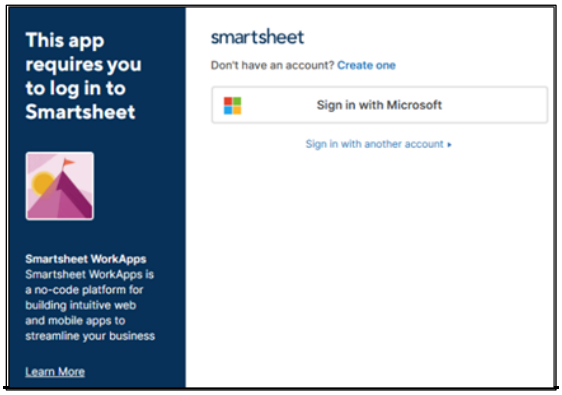
Instructions for Requesting Smartsheet WorkApp Access

1. For School System staff to gain access to TEA's Smartsheet and the *Federal Program Compliance (FPC) Title IV, Part A, Special Data Collection WorkApp*, a staff member at the school system with access to TEA's system currently will need to follow the instructions in step 2 below.
2. Individuals at the school system must enter the EDGAR Connect WorkApp, select the Smartsheet Email Access form, and follow the instructions below:
3. Open the form and select LEA (School System).
4. Check the box that says, *"I have permission from the Superintendent to add this email."* Enter the email of the individual you wish to add and click the blue "Save" button at the bottom right-hand side of the form.
5. Have the individual you wish to add complete the New User Certification Form.
6. You can now track the status of the addition request on the Smartsheet Email Access page. Typically, adding a new email will take 3-5 business days. If the individual you wish to add does not have access after 5 business days, please submit a help form through the EDGAR Connect Help Form.

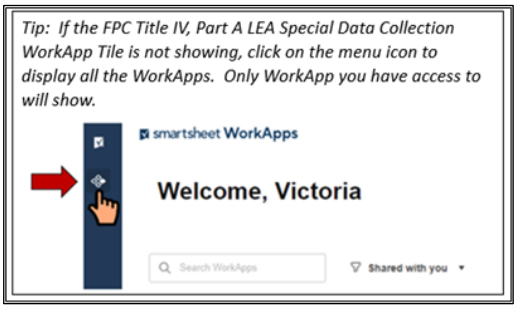
Title IV, Part A, Special Data Collection Smartsheet WorkApp

1. Log in to the Department of Grant Compliance and Administration WorkApp using the link provided below. Select "Sign in with Microsoft," and enter the Smartsheet credentials you received when first granted access to the WorkApp.

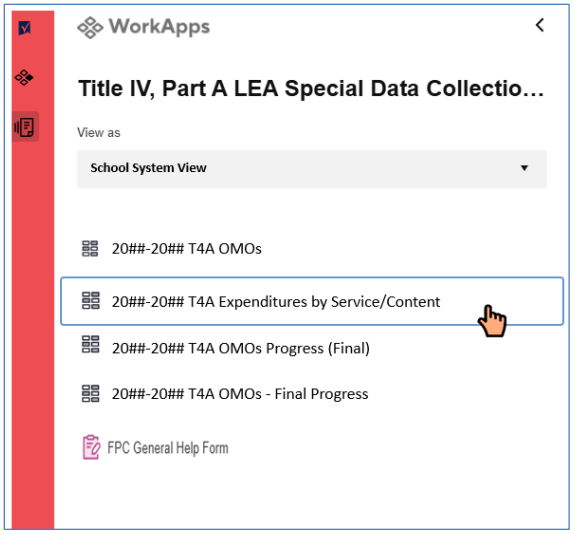
   Link to Access the Smartsheet WorkApp: https://workapps.smartsheet.com/.



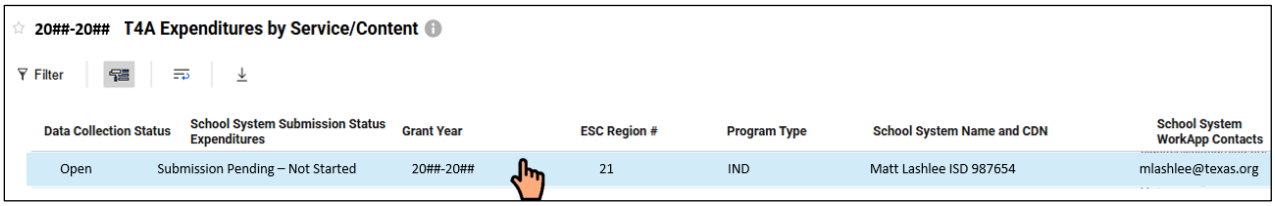
2. Locate and click on the Federal Program Compliance Division Title IV, Part A, (T4A) LEA Special Data Collection WorkApp Tile.



3. Locate and click on the applicable year T4A Expenditures link under the View (School System/ESC/Fiscal Agent).

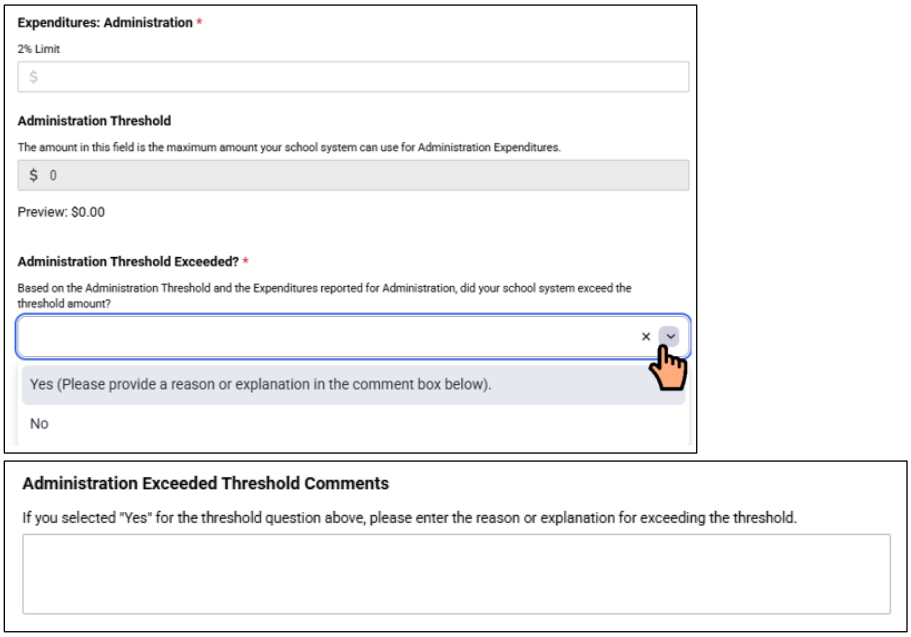


4. Click on the ribbon line(s) to access the Details Form – Data Tab for Data entry/view. Data submitted by the School System/ESC can be accessed here.

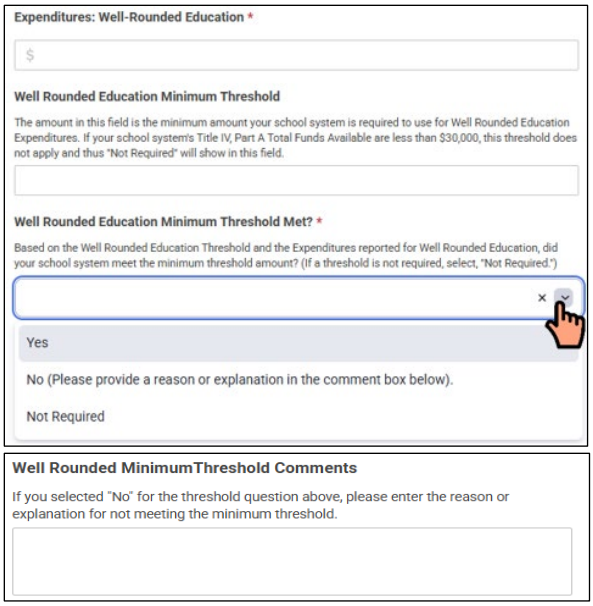


5. **Complete the Details Form**. Note that grayed-out fields cannot be edited/changed.
   a. **Program Contact Information:** Complete the fields with the information for the School System Program Contact. The Program Contact should be the person who is most familiar with the documentation submitted. This is the person TEA will contact if additional information and/or clarification is needed. Fields with a red asterisk (*) are required.
      i. Type the name of the School System Program Contact in the "School System Contact Name" field.
      ii. Type the email address of the School System Program Contact in the "School System Contact Email Address" field.
      iii. Type the phone number of the School System Program Contact in the "School System Contact Telephone Number" field using the following format: ###-###-####.

b. **Expenditures – Administration**: Type the total T4A Administration Expenditures for the applicable year. (Please note that there is a 2% limit for expenditures associated with Administration).
*These fields are required.
    i. Expenditures: Administration
    ii. Administration Threshold Exceeded? – Select "Yes" or "No."
    iii. Administration Exceeded Threshold Comments – If "Yes" was selected for the threshold question above, a reason or explanation for exceeding the threshold must be provided.

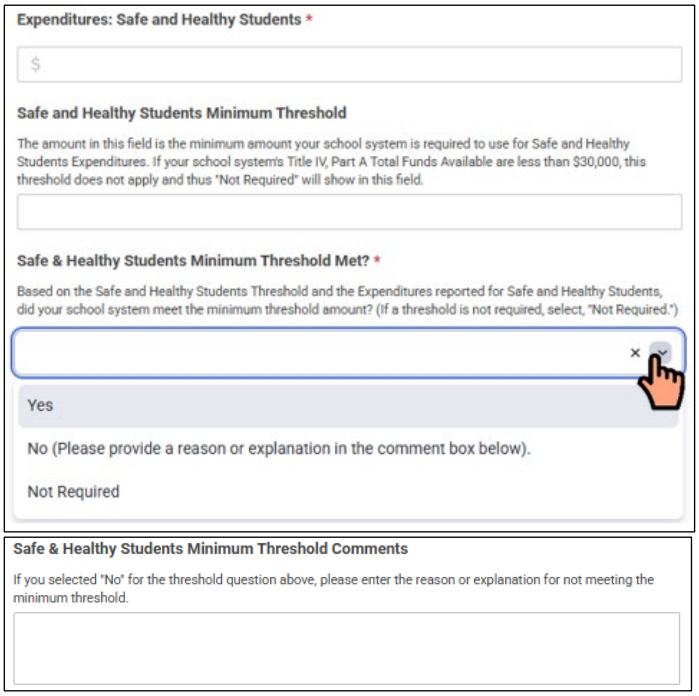


c. **Expenditures – Well-Rounded Education**: Type the total T4A Well-Rounded Education Expenditures for the applicable year. (Please note that for the Well-Rounded Education Minimum Threshold field, if your school system's Title IV, Part A Total Funds Available are less than $30,000, this threshold does not apply and thus "Not Required" will show in this field.)
*These fields are required.
    i. Expenditures: Well-Rounded Education
    ii. Well-Rounded Education Minimum Threshold Met? – Select "Yes," "No," or "Not Required."
    iii. Well-Rounded Education Exceeded Threshold Comments – If "No" was selected for the minimum threshold question above, a reason or explanation for not meeting the minimum threshold must be provided.



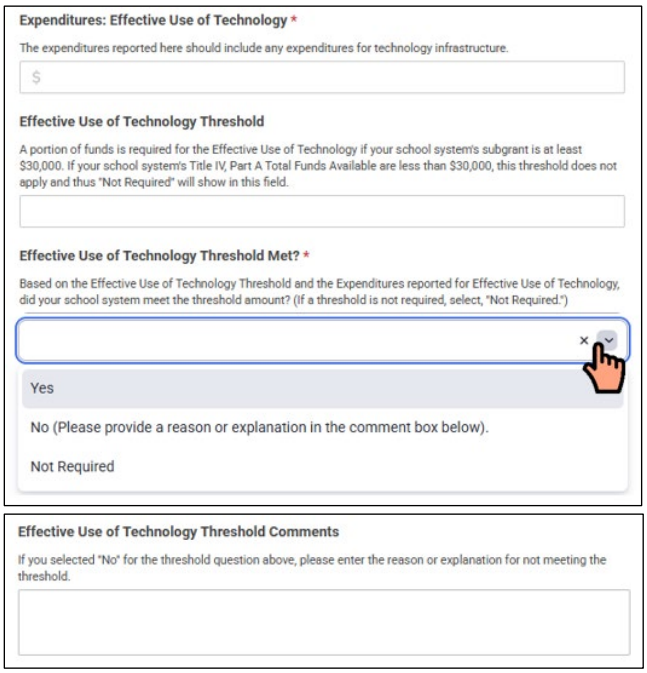
d. **Expenditures – Safe and Healthy Students**: Type the total T4A Safe and Healthy Students Expenditures for the applicable year. (Please note that for the Safe and Healthy Students Minimum Threshold field, if your school system's Title IV, Part A Total Funds Available are less than $30,000, this threshold does not apply and thus "Not Required" will show in this field.)
*These fields are required.

   i. Expenditures: Safe and Healthy Students
   ii. Safe and Healthy Students Minimum Threshold Met? – Select “Yes,” “No,” or “Not Required.”
   iii. Safe and Healthy Students Minimum Threshold Comments – If “No” was selected for the minimum threshold question above, a reason or explanation for not meeting the minimum threshold must be provided.

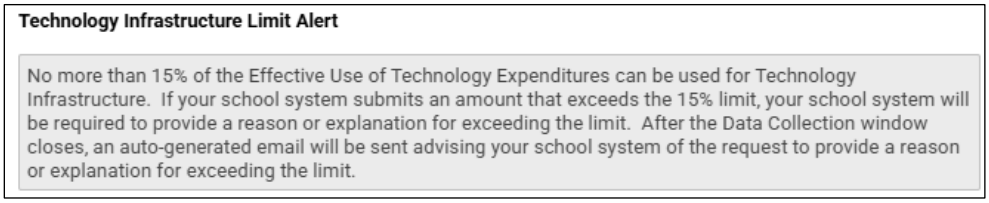


e. **Expenditures – Effective Use of Technology**: Type the total T4A Effective Use of Technology Expenditures for the applicable year. (Please note that for the Effective Use of Technology Minimum Threshold field, if your school system's Title IV, Part A Total Funds Available are less than $30,000, this threshold does not apply and thus "Not Required" will show in this field.)
*These fields are required.

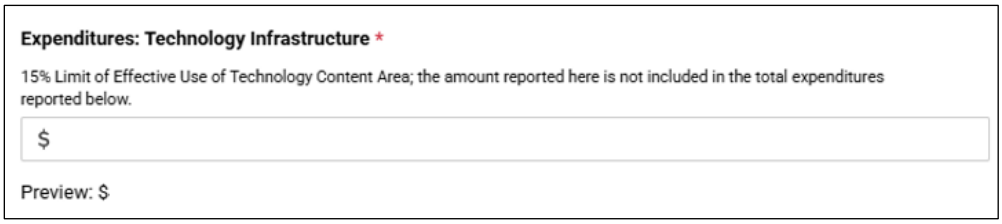
   i. Expenditures: Effective Use of Technology
   ii. Effective Use of Technology 'a portion of funds' was set aside? – Select "Yes," "No," or "Not Required."
   iii. Effective Use of Technology Portion of Funds Comments – If "No" was selected for the portion of funds threshold question above, a reason or explanation for not meeting the threshold must be provided.



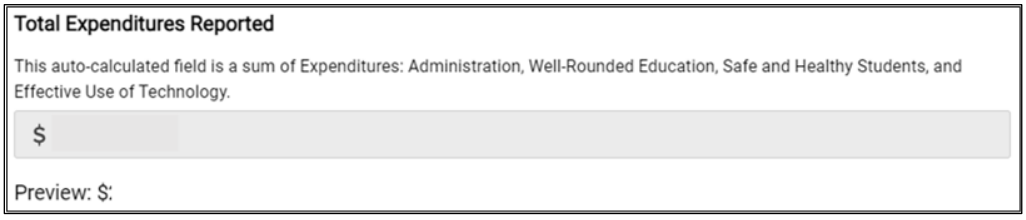
f. **Technology Infrastructure Limit Alert**: If your school system submits an amount that exceeds the 15% limit, your school system will be required to provide a reason or explanation for exceeding the limit. After the Data Collection window closes, an auto-generated email will be sent advising your school system of the request to provide a reason or explanation for exceeding the limit.



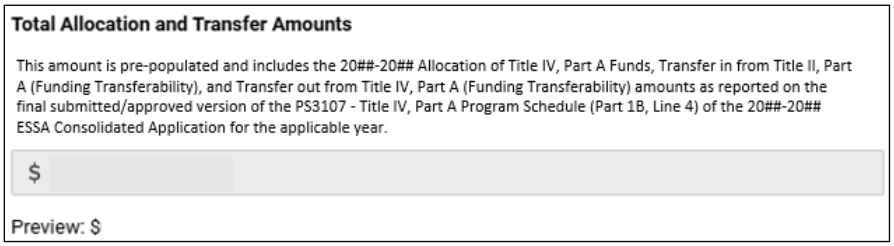
g. **Expenditures - Technology Infrastructure**: Type the total T4A Technology Infrastructure Expenditures for the applicable year. (Please note that there is a 15% limit on the expenditures reported for the Effective Use of Technology Content Area). $0 is an acceptable response. *This field is required.



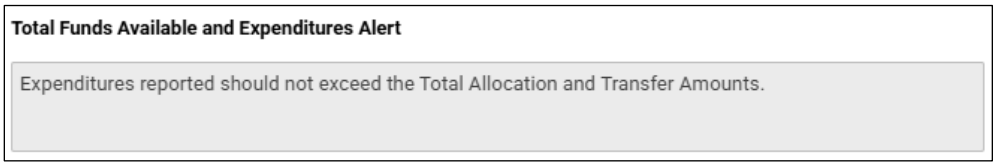
h. **Total Expenditures Reported**: When the data are saved, this field auto-calculates the total applicable year expenditures reported for Administration, Well-Rounded Education, Safe and Healthy Students, and Effective Use of Technology.



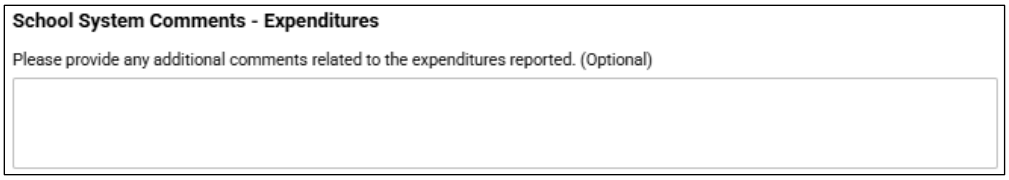
i. **Title IV, Part A, Total Allocation and Transfer Amounts**: This field is read-only. The amount is pre-populated and includes the 20##-20## Allocation of Title IV, Part A Funds, Transfer in from Title II, Part A (Funding Transferability), and Transfer out from Title IV, Part A (Funding Transferability) amounts as reported on the final submitted/approved version of the PS3107 - Title IV, Part A Program Schedule (Part 1B, Line 4) of the 20##-20## ESSA Consolidated Application for the applicable year.



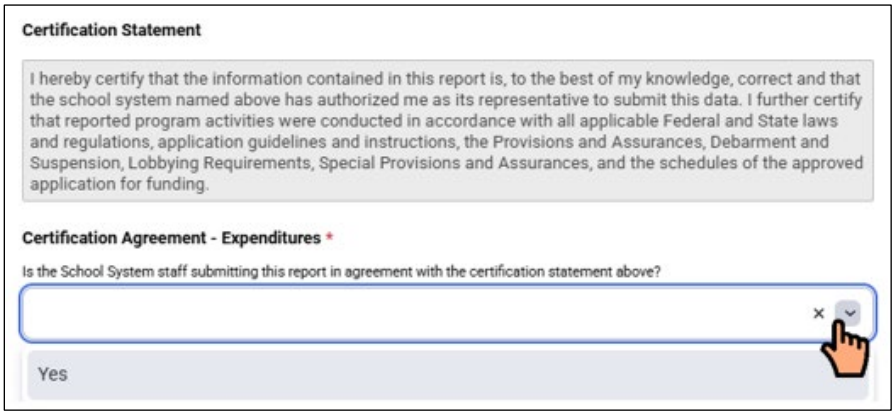
j. **Total Funds Available and Expenditures Alert**: Expenditures reported should not exceed the Total Allocation and Transfer Amounts.



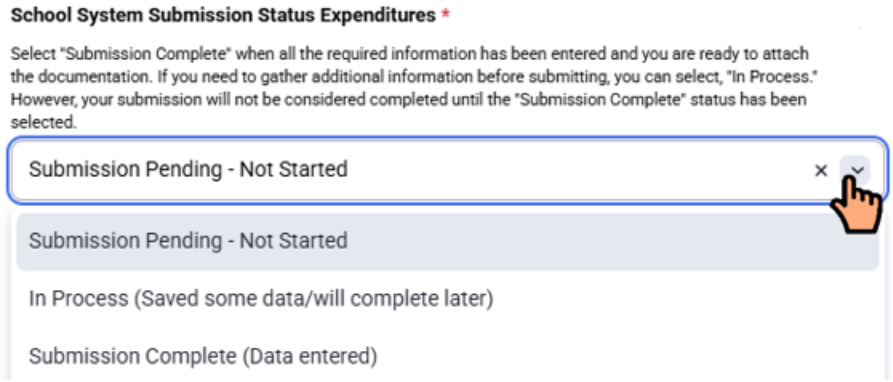
k. **School System Comments - Expenditures:** This section is optional. The School System should provide any additional information concerning the applicable year expenditure data that may be helpful for TEA.



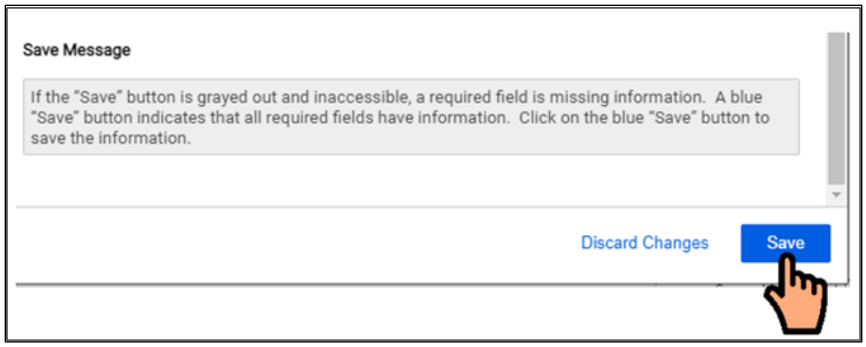
l. **Certification Statement**: Read the following Certification Statement: "I hereby certify that the information contained in this report is, to the best of my knowledge, correct and that the school system named above has authorized me as its representative to submit this data. I further certify that reported program activities were conducted in accordance with all applicable Federal and State laws and regulations, application guidelines and instructions, the Provisions and Assurances, Debarment and Suspension, Lobbying Requirements, Special Provisions and Assurances, and the schedules of the approved application for funding." Select "Yes" from the drop-down list for the following question: "Is the School System staff submitting this report in agreement with the certification statement above?"
*A "Yes" response from the drop-down list is required.



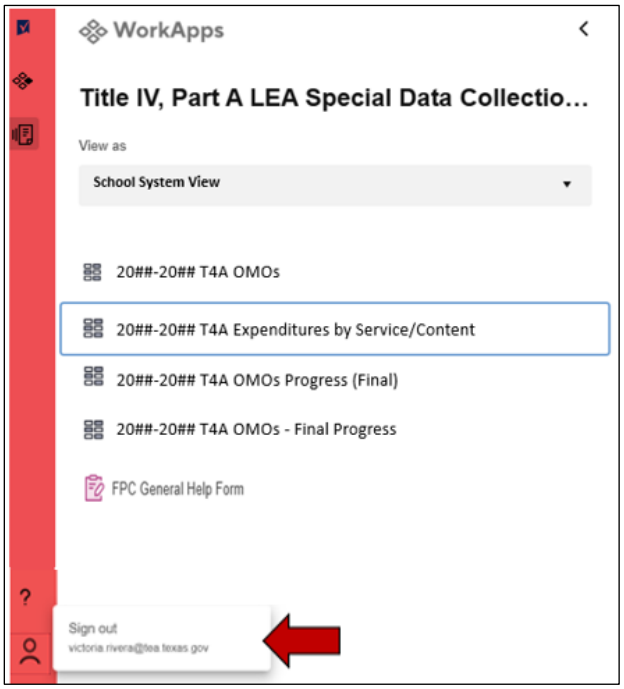
m. Select an appropriate submission status. Submissions will not be considered completed until the "Submission Complete (Data entered)" status has been selected and saved.



n. Click "Save" in the bottom right-hand corner of the Details Form – Data Tab. This will save the information that was typed in the details form under the data tab, if applicable. Note: If the blue "Save" button is grayed out and inaccessible, a required field with a red asterisk (*) is missing information. All required fields must be completed for the data to save.



6. Sign out of the Department of Grant Compliance and Administration WorkApp by clicking on the icon located in the bottom left-hand corner of the window and selecting "Sign out."



Resolving Smartsheet WorkApp Submission Issues

The FPC WorkApp General Help Form has been added to the School System, ESC, and Fiscal Agent Dynamic Views for School Systems and ESCs to submit any questions and/or report any issues they may be experiencing related to the various WorkApp projects administered by the Federal Program Compliance Division. The form link is available within the WorkApp environment. Please use the FPC WorkApp General Help Form for assistance with any FPC WorkApp-related issues, including those that may concern incorrect or incomplete data submissions, inadvertent attachment uploads, and/or access issues.

If School System or ESC staff are experiencing issues with the EDGAR Connect WorkApp, they will need to complete the help form available in the EDGAR Connect WorkApp for assistance.

FPC WorkApp General Help Form
Link: https://app.smartsheet.com/b/form/1b6692e7ac864fc682e8855d7d293fe9

Resources

- TEA ESSA Title IV, Part A - Student Support and Academic Enrichment (webpage)
- Federal Program Compliance Division Resources (webpage)
    - FPC Division General Smartsheet TEA WorkApp Training Video (FPC Resources webpage, Smartsheet Resources, December 2024)
    - FPC WorkApp General Help Form Instructions (FPC Resources webpage, Smartsheet Resources, February 2025)