ESEA AND IDEA CONSOLIDATED APPLICATION CHECKLIST

Office of Federal Programs

May 2026

The Department of Education and Workforce (DEW) uses this Consolidated Application Checklist to review a district's Consolidated application within the Comprehensive Continuous Improvement Plan (CCIP). Districts may also use this checklist as they prepare to submit the Consolidated application or revisions to the application. DEW will inform the district through the CCIP History Log if an application needs to be returned for correction, paused for clarification or correction, or if actions are needed on the next revision. For questions about the Consolidated application, contact the district's assigned DEW Federal Program Specialist. The contact information for the assigned specialist can be found in the CCIP Address Book.

PLAN REQUIREMENTS

For a district to receive Elementary and Secondary Education Act (ESEA) Title formula-based funds through the Consolidated application, the district must meet ESEA needs assessment and planning requirements found in ESEA Sections 1112 and 1114. In Ohio, districts complete one comprehensive needs assessment and plan within the Education Department's System of Tiered E-Plans and Supports (ED STEPS).

☐ The district and all schoolwide buildings completed the ED STEPS One Needs Assessment and One Plan in their most recent ED STEPS Cohort year.

☐ The district has a status of "Meets Criteria" or "Meets Criteria with Recommendations" on all requirements in the One Plan District ESEA Plan rubric.

☐ Schoolwide buildings have a status of "Meets Criteria" or "Meets Criteria with Recommendations" on all requirements in the One Plan Title I Schoolwide Plan rubric.

☐ The district considered recommendations in the One Plan District ESEA Plan rubric by the next Consolidated application revision (if applicable).

☐ Schoolwide buildings considered recommendations in the One Plan Title I Schoolwide Plan rubric by the next Consolidated application revision (if applicable).

☐ New Community Schools Only: The school submitted the New Community School Checklist to the assigned specialist instead of completing the ED STEPS One Plan. This checklist serves as the school's plan until it joins its ED STEPS Cohort.

CONSOLIDATED FUNDING APPLICATION REQUIREMENTS

In addition to meeting the ESEA plan requirements, a district must complete grant applications to receive ESEA Title grant awards. In Ohio, districts submit the ESEA Title grant applications

within a Consolidated funding application. The Consolidated application is completed within the CCIP. The requirements within the Consolidated application pages are listed below.

SECTIONS

The Sections page is an overview page for the Consolidated application with links to the application pages as well as "validations." Validation "errors" must be addressed to submit the application, and validation "warnings" call attention to an item that may need to be addressed. Validation warnings do not prevent the district from submitting the application. The Sections page also includes a change log to see the changes between revisions. Finally, the Sections page displays the current status of the Consolidated application and allows district and DEW representatives with the appropriate roles to change the application status to approve or return the application for correction.

☐ The district reviewed and resolved all validation error messages.

☐ The district reviewed and considered or addressed all validation warning messages.

☐ The district submitted the completed Consolidated application through the district approval workflow statuses of Draft Completed, Fiscal Representative Approved, and Authorized Representative Approved.

HISTORY LOG

The History Log is an audit record of all Consolidated application grant award notices, application status changes, comments from DEW, and comments from the district for the fiscal year.

☐ The district reviewed the History Log grant award notices, application status changes, and comments. The district addressed DEW comments or requests if applicable.

ALLOCATIONS

The Allocations page is an overview of all the Consolidated application grant allocations that the district has received in the fiscal year. On this page, the district can see all Consolidated application grant allocations that it has received in the fiscal year. The district may also transfer funds on this page from grants it receives that are able to be transferred out under the Transferability Authority in ESEA Section 5103 (Title II-A and Title IV-A) to grants that the district receives that allow transfers in under this section (Title I-A, I-C, I-D, II-A, III, IV-A, and V-B). Additionally, districts may consolidate any federal grants in the Consolidated application from this page into a Title I Schoolwide Pool to serve Title I Schoolwide buildings through one federal grant fund (Schoolwide Pool, Fund 598) as permitted under ESEA Section 1114.

☐ The district reviewed the grant allocations it received.

☐ Title I Schoolwide Consolidation/Pooling: The district engaged in planning and consultation with all relevant stakeholders and determined if the district and its schoolwide

buildings wish to consolidate some or all its federal funds into the Title I Schoolwide Pool. A school that consolidates funds from such other programs must still meet the purpose of the contributing grants, and is not relieved of the requirements relating to health, safety, civil rights, student and parental participation and involvement, services to private school children, comparability of services, maintenance of effort, uses of Federal funds to supplement, not supplant non-Federal funds (in accordance with the method of determination described in ESEA Section 1118(b)(2)). See DEW's Schoolwide Pooling Guidance for more information.

☐ Transferability: The district engaged in planning and consultation with all relevant stakeholders (including nonpublic schools, if applicable) and determined if the district wishes to transfer any Title II-A or IV-A funds into any of the other ESEA grants it received, which may include Titles I-A, I-C, I-D, II-A, III, IV-A, or V-B. The district considered the requirements of ESEA Section 5103, specifically that the transferred grants are now subject to all the requirements of the grant into which the funds are transferred, including nonpublic equitable services (if applicable).

☐ Alternative Fund Use Authority (AFUA): If the district is eligible for the Small Rural School Achievement (SRSA) Program authorized under ESEA Section 5211, the district has considered the Alternative Fund Use Authority (AFUA). AFUA is a flexibility that allows the district to spend their Title II–A and Title IV–A formula funds under the broader SRSA rules rather than the rules for those grants. Districts that qualify would make a History Log note to notify DEW that the district plans to use AFUA.

BUDGET

The Budget page for each grant the district received shows the district's grant Budget by Purpose and Object code (for more information, see the Uniform State Accounting System Manual).

☐ The district budgeted the total grant amount for all grants it received. The "Remaining" amount is $0.00.

☐ Validation errors are resolved and validation warnings were addressed as needed.

☐ Activities on the Budget page for each grant have corresponding descriptions on the Budget Details page that provide additional context for the Budgeted amounts.

☐ The district's budgeted activities align with One Plan action steps.

☐ If the district budgeted funds for Governance/Admin costs, and there is a required or recommended limit within the grant, the district has addressed any validation errors or warnings. For Title I-A, the Governance/Admin amount is also on the district Set Asides page. Upon request from the assigned specialist, the district may be required to provide a History Log note with additional justification or description of the Governance/Admin costs.

☐ If the district has an approved indirect cost rate and budgeted funds for indirect costs, all validation errors were addressed to ensure the indirect cost budgeted amount matches the approved indirect cost rate.

☐ If the assigned specialist questioned any budgeted activity, the district edited the application and/or provided a History Log note to provide additional context for the activity.

☐ The grant Budget accounts for any required reservations for the grant, such as the set asides amount for homeless students and the set aside for parent engagement in Title I-A (if the district received an allocation of $500,000 or more), and nonpublic equitable services in Title I-A, I-C, II-A, III, or IV-A (if applicable).

☐ The district is aware that certain costs, including but not limited to capital outlay costs, as described in the Uniform Administrative Requirements Section 200.407, require prior approval and may need additional justification for DEW to pre-approve the cost within the application approval process.

BUDGET DETAILS

The Budget Details page for each grant the district received provides additional context for the budget activities on the district's budget.

☐ The district completed all required cells in the Budget Details page to provide additional context for the grant programming and budgeted activities.

☐ The district resolved any validation errors and addressed any validation warnings as needed.

☐ Budgeted activities align with the district's action steps within the ED STEPS One Plan.

☐ If the assigned specialist questioned a budgeted activity, the district edited the application or provided a History Log note to provide additional context for the activity.

NONPUBLIC SCHOOL SERVICE

Some Title grants require the district to provide equitable services for students from the district attending nonpublic (private) schools. The Consolidated application grants with an equitable service requirement include Title I-A, Title I-C, Title II-A, Title III, Title III-Immigrant, and Title IV-A. See the United States Department of Education (USED) Title I, Part A Equitable Service Non-Regulatory Guidance and Title VIII, Part F Non-Regulatory Guidance for more information. These grants have a Nonpublic School Service page. The Nonpublic School Service page pulls data from DEW's Nonpublic Data System (NPDS) related to low-income students in nonpublic schools, the participation status of the nonpublic school, the Consultation Guide status, and the equitable service amount for the nonpublic school. This data helps the district ensure it is

budgeting the appropriate amount of funds to serve students from the district in nonpublic schools.

☐ Nonpublic Participation forms for all schools are in Public Approved status or a History Log note documents the reason if a form is in another status.

☐ Consultation Guides are completed for all served nonpublic schools and are in Nonpublic Approved status by the start of the school year.

☐ The district has added a History Log note if any of the nonpublic forms are in Correction Needed status.

☐ The total equitable service amount for the grant displayed on the Nonpublic School Service page is budgeted on the Nonpublic purpose code in the Budget.

VIEW/UPLOAD DOCUMENTS

For some Consolidated application grants, the district may be required to upload supporting documentation. These include Title I-A in certain scenarios (see Building Eligibility and Set Asides pages below) and Title I-Neglected and Title I-Delinquent (see below). The assigned specialist may ask for other documents to be uploaded. Districts can upload any required and requested documents on the View/Upload Documents page within the grant application.

☐ The district uploaded any required or requested documents to the View/Upload Documents page in the grant application.

☐ The documents do not contain any Personally Identifiable Information (PII).

CONTACTS

On the Contacts page, the district selects the individual that is the main district contact for the Consolidated grants. For an individual to appear as an option on the Contacts page, the individual must have an appropriate OEDS Role.

☐ The district selected a contact on the Contacts page.

SUBSTANTIALLY APPROVED DATES

The Substantially Approved Date (SAD) is the date a grantee is legally allowed to begin obligating grant funds. This date is determined when the grant is submitted in a substantially approvable form. See the DEW Grants Management Guidance on Substantially Approved Dates and the DEW Grants Manual for more information. The Substantially Approved Dates page displays the SAD for the district's Consolidated application grants, as well as the Budget Revision Effective Dates for budget cell amounts that the district updated on an application revision (if applicable).

☐ The district reviewed the Substantially Approved Dates page.

ASSURANCES

Districts are required to comply with many federal laws and requirements to receive federal funds. Many of these requirements are provided as a single set of assurances on the Assurances page. The district's Fiscal Representative/Treasurer and Superintendent/Authorized Representative are prompted within the Consolidated application to review and sign the general assurances upon application submission. This step is the same for the FY27 Consolidated application as in prior fiscal years.

☐ The district reviewed the Assurances page and the Fiscal Representative and Authorized Representative signed the assurances when changing the application status to Fiscal Representative Approved and Authorized Representative Approved.

GRANT-SPECIFIC PAGES

TITLE I-A BUILDING ELIGIBILITY

The Building Eligibility page helps the district determine which schools are eligible for Title I-A services, the type of Title I-A services (Schoolwide or Targeted Assistance), and the rank order in which the schools will be served with Title I-A funds. The district requirements for Title I-A eligibility, Schoolwide, and Targeted Assistance programs can be found in ESEA Sections 1113-1115. More information can be found in DEW's Title I Building Eligibility Guidance.

Enrollment and Low-Income Data:

☐ The district determined accurate enrollment and low-income counts for each school using DEW pre-populated Free and Reduced Price Lunch (FRPL)/Community Eligibility Provision (CEP) data, Temporary Aid for Needy Families (TANF), Medicaid, census data, or a composite measure.

☐ The district used the same time period for data across all schools in the district.

☐ In most cases, the district can use the pre-populated Free and Reduced Price Lunch/CEP data, which was originally reported by the district's Food Service Director in the Claims Reimbursement and Reporting System (CRRS) in October of the prior fiscal year. In cases where the district needs to change this data, the district should make a copy of the originally populated data for their records prior to making any modifications.

☐ If the building eligibility data was modified, the district uploaded supporting documentation on the View/Upload Documents page and ensured the uploaded files did not contain Personally Identifiable Information (PII).

☐ The district completed the enrollment and low-income boxes on the Building Eligibility page for all K-12 elementary and secondary schools, including online learning schools if they report students for federal accountability purposes.

Rank Order:

☐ The district completed the Sort Order column to rank school attendance areas.

☐ The district served all schools with a poverty rate above 75% first, regardless of grade span, before serving any school below 75%. These schools were served in descending order of poverty.

☐ With any remaining funds the district served schools below 75% either in descending order of poverty or by grade span and descending order of poverty.

☐ If the district has fewer than 1,000 total students or only one school per grade span, the district is exempt from ranking requirements.

Title I Eligibility:
☐ The district determined a school was Title I eligible if it is at or above 35 percent of poverty or the district average, or by other allowable ESEA factors. The school is eligible by other factors if it is at/above district-wide grade span poverty average for the relevant grade span; by rounding, by feeder pattern; if there are less than 1,000 students in district; or if the school was served the previous year. (If the school is not eligible for the current year, but was eligible and served the preceding year, the building may be served for only one additional year unless it re-qualifies under one of the other eligibility criteria).

☐ The district correctly completed the Eligible By Other Factors section on the Building Eligibility page.

Service Types:
☐ Schoolwide New (SW-New): The district chose Schoolwide-New for any new schoolwide buildings and added a History Log note confirming the school engaged in a year of planning or the LEA determined in consultation with the school that a year of planning was not needed. The school completed the One Plan and meets criteria on the Title I Schoolwide Rubric.

☐ Schoolwide Exist (SW-Exist): The district chose Schoolwide-Exist for schools with 40% poverty or more that operated a schoolwide program in the prior year. The school completed the One Plan and meets criteria on the Title I Schoolwide Rubric.

☐ Schoolwide Waiver (SW-Waiver): The district chose Schoolwide-Waiver for any school that does not meet the 40 percent threshold but is Title I-eligible and wishes to serve the school through a schoolwide model. The district completed the Schoolwide Waiver page, and the assigned specialist approved the waiver in the History Log. The school completed the One Plan and meets criteria on the Title I Schoolwide Rubric.

☐ Targeted Assistance (TA): The district chose Targeted Assistance for any school below 40% poverty but is Title I-eligible and for which the district did not seek a Schoolwide Waiver.

☐ Comparable (Comp): The district entered a History Log note indicating the type of additional services and amount of funding that it will provide in a comparable manner to Title I services for which the building is eligible. The district must provide service from state and local funds that are at the level the building would have received if the district was providing services with Title I funds.

TITLE I-A SET ASIDES

On the Set Asides page, districts complete all required and optional district reservations prior to determining the school PPA and school budgets. The Consolidated application calculates the required set asides, such as the parent and family engagement set aside if the district has a Title I-A allocation greater than $500,000, the nonpublic equitable service set aside if there are participating nonpublic schools, and the homeless set aside amount. The page also displays the school per pupil amount in real time based on the district required and optional reservations, as well as the 125 percent minimum PPA if a district serves a school that has less than 35 percent of students from low-income families. More information on within-district allocations and district reservations can be found in the USED's Title I Within-District Allocations Non-Regulatory Guidance.

☐ The district set aside an amount for Governance/Admin that exceeds the five percent recommended cap. The district provided justification in the History Log.

☐ The district had a Title I allocation greater than $500,000, and therefore set aside 1 percent of the allocation, of which 90 percent needs to be provided to Title I-served schools with priority to high-needs schools. The district involved parents in the decisions about how funds are allotted for the parent involvement set aside activities.

☐ The district had participating nonpublic schools and an equitable service requirement. The equitable service amount is reserved on the Set Asides page. The district budgeted the nonpublic set aside amount on the nonpublic purpose code of the Title I-A Budget and completed the Budget Details and Nonpublic School Service pages.

☐ The district set aside optional district reservations on the Set Asides page, such as salary differential, preschool supports, etc. that are district managed initiatives. If the total amount of Set Asides exceeds 30 percent, the district completes the DEW Title I District-Managed Initiatives Form and uploads it to the Title I View/Upload Documents page.

TITLE I-A SCHOOL ALLOCATION – PPA LIST

The Title I School Allocation – PPA List page is completed after the Building Eligibility and Set Asides pages. The purpose of this page is to establish the PPA for each Title I-served building in rank order matching the ESEA requirements. Ultimately, the page also multiplies the PPA by the enrolled students in the building to establish the school allocation. The school allocation should be used by the district to budget for the school. The PPA page ensures the schools higher on the rank order and with more need receive the higher per pupil amount and services go to the schools with the highest need.

☐ The district completed the PPA box for each of its Title I-served buildings in rank order. The PPA ensures the higher poverty schools receive higher, or at least equal, funding per student.

☐ The district ensured the remaining amount on the School Allocation – PPA List page is as close to zero as possible so all funds are budgeted on the school budgets.

☐ If the district served a school with a poverty rate below 35%, it must ensure that all schools in the district receive a minimum PPA. This minimum is at least 125% of the district's overall Title I allocation per child. The Set Asides and PPA pages calculate these amounts.

☐ The district used the school allocation amounts on the PPA List page to establish the school budgets by Operational Unit (OPU).

TITLE I-A SCHOOLWIDE WAIVER REQUESTS

Districts that wish to serve a school that is under 40 percent of poverty through a schoolwide model must submit a schoolwide waiver request. Ohio established the schoolwide waiver request within the Consolidated application on the Title I Schoolwide Waiver Request page. For more information, see DEW's Schoolwide Waiver Guidance.

☐ The district submitted the Schoolwide Waiver Request as a part of the Consolidated application.

☐ The assigned specialist reviewed the waiver request and added a History Log note approving the request.

TITLE I-A SUPPLEMENT, NOT SUPPLANT

Districts must ensure the use of their federal education funds supplement, not supplant the state and local resources used for education. The compliance test for supplement, not supplant for Title I, Part A was changed under the Elementary and Secondary Education Act (ESEA), as amended by the Every Student Succeeds Act (ESSA). Districts must now have a methodology for how their allocation of state and local resources is Title I-neutral. Districts may be exempt in certain scenarios. For more information, see the DEW Title I Supplement, Not Supplant Guidance. On the Supplement, Not Supplant page, the district indicates if they are required to have a methodology or are exempt, and then describes the type of supplement, not supplant methodology the district used to ensure the allocation of state and local resources is Title I-neutral.

☐ The district completed the Title I Supplement, Not Supplant page and selected accurate options for if the district was required to have a methodology based on the district's building configuration.

☐ The district selected a methodology option or was exempt from needing to demonstrate a methodology.

☐ The district kept its methodology on hand for monitoring and audit purposes and to ensure the allocation of state and local resources is Title I-neutral.

SCHOOLWIDE POOL

Schools are able to consolidate some or all of their local, state, and federal funds to serve schools in a single fund account. In Ohio, this is called Schoolwide Pooling, and it is completed on the Allocations, Schoolwide Pool Overview, and Schoolwide Pool Budget pages. More information about schoolwide pooling can be found in DEW's Title I Schoolwide Pooling Guidance.

☐ The district completed transfers on the Allocations page from the contributing grants into the Schoolwide Pool.

☐ The district then completed the Title I-A Building Eligibility, Set Asides, School Allocation – PPA List, Nonpublic School Service and Schoolwide Waiver pages (if applicable) to determine the eligible schoolwide buildings, rank order, district reservation amounts, and Per Pupil Amounts.

☐ The district completed any other grant pages for any reservations or remaining amounts that were not included in the Schoolwide Pool.

☐ The district completed the activities portion of the contributing grant Budget Details pages to show how the district is still meeting the purpose and intent of the contributing grants.

☐ The district completed the Schoolwide Pool Overview page to determine the schoolwide building budgets and proportion of funds by contributing grant. The district also included state/local funds are included in the pool for participating buildings as a proportion of the schoolwide pool.

☐ If the district contributed IDEA funds to the pool, the district still completed any required Budget Details and Budget Redirection items such as Maintenance of Fiscal Support (MOFS) and ensured students get all required services.

☐ The district completed the Schoolwide Pool budget and it matched the total schoolwide pool allocation from the Allocations and Schoolwide Pool Overview pages.

TITLE I-N AND TITLE I-D DISTRICT INSTITUTION/AGREEMENT DETAILS

The Title I-Neglected and Title I-Delinquent grants primarily serve students in facilities within a district's boundaries. In Ohio, these funds flow to the district as separate grant awards within the Consolidated application. While the Budget and Budget Details pages are similar to other grants, Title I-Neglected and Title I-Delinquent grants require the district and the facility to complete a District Institution Agreement.

☐ The district completed the District/Institution Agreement page, including listing the service provider, needs assessment, program details, assessment summaries, parent involvement, objectives, service measures, hours of programming, and meeting information.

☐ The district uploaded copies of the formal agreements to the View/Upload Documents page within the application.

IDEA-B AND IDEA EARLY CHILDHOOD

In addition to the ESEA Title formula grants, the Consolidated application also contains the Individuals with Disabilities Education Act (IDEA) and IDEA-Early Childhood grants. These grants are supported by the DEW Resource Management team. Speak with your Federal Programs Consultant if you are unsure who is your Resource Management Specialist.

☐ The budget activities align to One Plan.

☐ The district ensured instructional vs. non-instructional staffing entries are correct.

☐ The district verified that the nonpublic proportionate share is budgeted on the nonpublic purpose code line.

☐ The district submitted the Construction Approval Form if IDEA-B funds are used for construction/renovation.

☐ The district met any Comprehensive Coordinated Early Intervening Services (CCEIS) requirements, including the CCEIS plan, if applicable.

☐ The district completed the Contact section.

☐The district met Maintenance of Fiscal Support (MOFS).

For additional questions about the IDEA grants, contact the district's Resource Management Specialist.

FEDERAL PROGRAMS RESOURCES

Federal Programs Website
OFP ESEA Resource Guide
Title I, Part A Spending Guide
Title II, Part A Spending Guide
Title IV, Part A Spending Guide
Title V, Part B Spending Guide
Title I Schoolwide Guidance
Title I Schoolwide Pooling Guidance
Title I Schoolwide Waiver Guidance
Title I Building Eligibility Guidance
Federal Programs Timeline
Maintenance of Effort Handbook
Supplement, Not Supplant Guidance
Comparability Frequently Asked Questions