OSEP PERSONNEL DEVELOPMENT PROGRAM DATA COLLECTION SYSTEM (PDPDCS): ANNUAL CHECKLIST

This document lists the steps that each OSEP PDP grantee must take during *each year of funding* to ensure their grant is properly updated in the PDPDCS. The tasks listed in this checklist are required to fulfill the grant under regulations 34 CFR §304.23.

Instructions for Using this Checklist:

1. Beginning with Step 1, review each of the steps and supplementary information. If your project has not yet enrolled scholars, only complete Steps 1-3.

2. Check the box when you have completed each task.

3. If this is the final year of your grant, please complete these steps and **then** follow the PDPDCS Grant **Closeout Checklist** to ensure compliance in closing out your grant.

4. For more information please review the FAQs or contact the Help Desk if you have any questions or concerns at any point of the process. The Help Desk is staffed Monday–Friday 8am–8pm EST and is available via email at **serviceobligation@ed.gov** or by phone at 1-800-285-6276.

5. Retain a copy of the checklist with your grant records.

Number	Task	Checkbox	Important Information
Step 1	**Set up an account** in the **PDPDCS** if you have not already done so.		Project Directors with older PDP grants will see a new FY grant added to their list of grants, if applicable. Project Directors with a new PDP grant award will receive an email with a link to set up their account.
Step 2	Attend or watch the recorded **grantee training webinar.**		The two webinars—one for new grantees and one for returning grantee—are typically hosted in December or January, prior to the annual data collection period. The most recently recorded webinars are available on the **Training and Resources page**.
Step 3	**Add or change the Secondary User** if applicable.		Secondary users have a unique login and can enter scholar information into the system to assist the Project Director. Only one Secondary User is permitted access to make changes to the grant at a time. Project Directors can change the Secondary User at any time.

? More Questions?
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Number	Task	Checkbox	Important Information
Step 4	Add all **new scholars who have received funding** within 30 days of enrollment.		**Follow all steps below to add each new scholar:**
			a. Click on "Add New Scholar Record".
			b. Search for the scholar's SSN to determine if there is a pre-existing record for this scholar.
			c. Ensure that a completed **Pre-Scholarship Agreement** is uploaded for each scholar receiving funding. ***If uploading a document, redact the scholar's SSN from the agreement before uploading.***
			d. Enter scholar contact, demographic, and training data into the PDPDCS.
			e. Submit the scholar record. OSEP requires that a scholar record must be completed within 30 days of that scholar receiving funding.
			f. Make sure all scholars receiving funding are entered and submitted into the system by the close of the data collection period in April.

*Update information in the PDPDCS for all scholars within **30 days of a change** in the scholar's status (e.g., graduates) or, if there is no change, during the data collection period.*

Number	Task	Checkbox	Important Information
Step 5	Update **Section G. Current Training Program** information for each scholar who is enrolled or enrolled but no longer receiving OSEP funding.		a. Update full- or part-time scholar status for the current or most recent grant budget period.
			b. Update the amount of funding the scholar received during the current or most recent grant budget period. *Enter $0 for a scholar who was enrolled in the training program but did not receive funding during the current or most recent grant budget period.*
Step 6	Update **Section H. Employment Information During OSEP Grant Program** for each scholar who is enrolled or enrolled, no longer receiving funding.		Update the scholar's employment status for each budget period the scholar was enrolled in the program, regardless of whether the scholar received funding that year.
Step 7	Update **Section I. Scholar** Status for each scholar who is enrolled or enrolled, no longer receiving funding.		a. Enter completion or exit before completion date for scholars no longer enrolled or enrolled, no longer receiving funding.
			b. If the scholar has exited prior to completion, make sure to enter the date, reason for exiting, and whether the scholar is expected to enroll in another OSEP grant program in the future. *If the grant has ended before the scholar completed the program, please indicate that the scholar has exited without graduating/completing the program and choose **"OSEP support terminated due to OSEP grant ending"** as the reason.*

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Number	Task	Checkbox	Important Information
Step 8	If the scholar has **completed one academic year or more** of the OSEP-funded program, double-check the date that the scholar completed one academic year.		Scholars will only be able to enter their employment to begin fulfilling their service obligation after the date of completion of one academic year.
Step 9	Fill out **Section J. Scholar Exit Information** for each scholar who has completed/graduated or scholars who have not completed by the end of the grant.		Make sure to indicate at least one exam or measure the scholar took to demonstrate knowledge and skills. *Review all options and select each measure the scholar has taken, up to five measures (including grantee-specific measures, national organization tests, and state-specific tests).*
Step 10	Complete **Section K. Service Obligation Information and Exit Certification** for each scholar who has graduated/completed or exited prior to completion.		Submit or upload the completed and signed **Exit Certification** for each scholar. Once a scholar record has been submitted, it can no longer be edited by the grantee. Please contact the Help Desk to make changes to a scholar's record if the scholar has graduated/completed or exited and the record has been submitted.
Step 11	Contact all scholars with a reminder to **login to the PDPDCS every 6 months** and ensure they understand their service obligation requirements.		Scholars should review and update their contact information (especially email addresses) and enter eligible employment if applicable.
Complete all updates to the PDPDCS system for the previous grant budget year by the close of the annual data collection period. Data collection period dates will be announced annually to Project Directors via email before the start of the period and will be included in both the New Grantees Webinar and Continuing Grantees Webinar.			
Step 12	Follow up with scholars who have a status of **"Fulfillment not in progress."**		Scholar statuses can be found on the "View on Scholar Records" page. Contact scholars who are eligible to begin fulfilling their service obligation, and either request the scholar enter any employment information, or request the scholar follow-up with the employer to verify their employment.
Step 13	Review the Grant **Final Year Closeout Checklist** if you are in the last year of your grant.		

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