



# OSEP PERSONNEL DEVELOPMENT PROGRAM DATA COLLECTION SYSTEM (PDPDCS): FINAL YEAR CLOSEOUT CHECKLIST

This document lists the steps that each OSEP PDP grantee must take during their *final year of funding* to close out their grant in the PDPDCS. All tasks listed in this checklist are required under regulations 34 CFR § 304.23.

All scholars should have received funding and begun the program prior to the final year of the grant. In this last year, you will focus on exiting any remaining scholars, confirming scholar contact information in the PDPDCS, and reminding scholars to begin entering their employment information into the PDPDCS to fulfill their service obligation.

## Instructions for Using this Checklist:

1. If this is the final funding year of your grant (including any No Cost Extensions), follow the steps in the [Grant Year Annual Checklist](#) first, and then use this document.
2. Enter the Grant End Date below to determine when you must begin each of these Steps. Step 1 should begin 100 days prior to the end date of the grant.
3. Use the check box as a personal reference to indicate when you have completed each task.
4. Make sure to review the supplementary information included with each step. This information is also available in the [OSEP PDPDCS FAQs](#).
5. Contact the Help Desk at [serviceobligation@ed.gov](mailto:serviceobligation@ed.gov) or 1-800-285-6276 if you have any questions during any step of the closeout process.

## Grant End Date:

Number	Task	Checkbox	Timeline	Important Information
Step 1	Verify the secondary user is still a part of the grant or change the Secondary User.		Perform verification <b>100 days prior</b> to the end date of the grant.	Only one Secondary User is permitted access to make changes to the grant at a time.
Step 2	Verify all PDF upload Pre-Scholarship Agreements are accurate and valid.		Perform verification <b>100 days prior</b> to the end date of the grant	Ensure all PDF agreements are signed and dated by both the scholar and the Project Director and that no pages are missing.



### More Questions?

If you have any questions about this document or other PDPDCS processes, please contact the Help Desk at [serviceobligation@ed.gov](mailto:serviceobligation@ed.gov) or 1-800-285-6276. The Help Desk is staffed Monday–Friday, 8 am–8 pm ET.

Number	Task	Checkbox	Timeline	Important Information
Step 3	Follow up with scholars who have a status of "Fulfillment not in progress."		Contact scholars <b>90 days prior</b> to end date of the grant.	These scholars are eligible to begin fulfilling their service obligation and either have not entered any employment to begin doing so, or their employer has not verified their employment.
Step 4	Ensure all scholars have a status of graduated/completed or exited without completion. Each scholar must have a signed <b>Exit Certification</b> uploaded in PDPDCS.		Review and update the status of all scholars <b>90 days prior</b> to the end date of the grant.	If the grant is going to end before the scholar completed the program, indicate that the scholar has exited without graduating/completing the program, choose " <b><i>OSEP support terminated due to OSEP grant ending</i></b> " as the reason, and complete and sign an Exit Certification with the scholar.
Step 5	Confirm that the contact information (especially non-university email addresses) for each scholar in the PDPDCS is correct.		Review information <b>70 days prior</b> to the end date of the grant.	After the grant has closed, PDPDCS will contact a scholar if there are any issues with their record or to enter repayment. If PDPDCS cannot reach the scholar, the Project Director will need to assist.
Step 6	Contact and ensure scholars understand their service obligation requirements and have logged into the PDPDCS.		Contact scholars <b>60 days prior</b> to the end date of the grant.	No scholars should have a system status of "Awaiting login." You can see which scholars remain in this status by clicking the "View all scholar records link" on your grant main page. <i>If scholars have trouble accessing the PDPDCS, remind them of the email address in their scholar record, which is their username. You should refer scholars to the Help Desk if necessary.</i>
Step 7	Confirm all scholars are listed as "Graduated/completed" or "Exited without completion" by the grant end date.		Complete final confirmation <b>50–30 days prior</b> to the end date of the grant.	Notify the Help Desk immediately if any scholars still do not have a graduated/completed or exited status and you are experiencing issues reaching the scholar to obtain information for completing their record including a completed and signed Exit Certification.
Step 8	Notify your OSEP Project Officer of any issues, indicate that all scholar records have been updated, and your grant is ready to be closed out.		Contact OSEP <b>30 days prior</b> to the end date of your grant.	Do not wait for your grant to end before contacting your OSEP Project Officer. If there are any outstanding issues, you may be viewed as non-compliant with regulations, which could affect future grant funding.



**More Questions?**

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