



# Fluid Review Tutorial

OPSB Fall 2017 Charter RFA Process



Sign up for fluid Review

# Sign up for Fluid Review



- ▶ Applicants must first Sign Up to use Fluid Review
- ▶ To register, click here for OPSB's Charter Application Site: <https://opsb-charter-rfa.fluidreview.com/>
- ▶ On the first page, you will find a button for those who **Need an Account**
- ▶ When signing up, you will also indicate which type of application you plan to submit
  - ▶ Type 1: New Operators
  - ▶ Type 1: Existing Operators
  - ▶ Type 3: Conversion of Existing Public School
  - ▶ Further information about application types can be found on page 11 of the [RFA Part 1 Guidance](#)

The screenshot shows the website for the Orleans Parish School Board's 2017 Charter School Request for Applications. The page includes the OPSB logo, navigation links for "Web Links" and "Help", and a main heading "Orleans Parish School Board 2017 Charter School Request for Applications". A red notice states that the board has received authorization from the Louisiana Department of Education to operate a second charter approval process. Below this, there is a section for "Important Eligibility Information" detailing Louisiana law requirements, such as only nonprofit organizations holding charters and application teams including three certified teachers. An "Anticipated Timeline for the additional 2017 Charter RFA Process" section notes that applications will be received through August 31, 2017. A "Public Disclosure" section states that application materials become public records. An "Application Contact" section provides contact information for Forrest Collins, Director of New School Development. On the right side, there is a "Sign In" section with email and password fields, and a "Sign In » Trouble Signing In?" button. A yellow box highlights a "Sign Up »" button under the heading "Need An Account?", with a blue arrow pointing to it.



# Sign-Up for Fluid Review

- ▶ Enter the name of the main point of contact for the application
- ▶ Enter an email address where this person can be contacted
  - ▶ This email address may be used by OPSB Portfolio office to contact you in the event there are questions about the application submission
- ▶ Create a password and confirm it

**Ready to go?**

We just need a bit more information from you before you can start. Once you sign up, you will need to check your email for an account activation link. You should receive the email within a couple of minutes. Make sure to type your email correctly! If you already have an account, you can [log in here](#).

**Full name:**

**Email:**

**Create a password:**

**Confirm your password:**



# Sign-Up for Fluid Review

- ▶ Add a logo or photo to represent your organization (optional)
- ▶ Select your applicant category
  - ▶ Existing School Operators
  - ▶ Experienced Charter Operators (CMOs)
  - ▶ New Operators
  - ▶ Further information about application types can be found on page 10 of the [RFA Part 1 Webinar](#)
- ▶ Enter your local time zone
  - ▶ Entering your local time zone will ensure that deadlines are set to your local time zone
- ▶ Complete registration

A screenshot of a registration form. The form includes a section for "Add an Avatar" with an "Upload a Picture" field containing a "Choose File" button and "No file chosen" text, and a "Take a Picture:" button. Below this is a "Category" dropdown menu with a list of options: "Please select...", "Existing School Operators", "Experienced Charter Operators", and "New Operators". A yellow highlighted box contains the text: "By registering, you agree to receive email communications from us. You may unsubscribe at any time." At the bottom right is a "Register" button.

# Sign-Up for Fluid Review



- ▶ If your applicant team does not have an existing application, one will need to be created
- ▶ To start the application for the year, select **Create a New Submission** and select your application type
- ▶ Select **Get Started** to create your new submission

A screenshot of the Orleans Parish School Board's online submission portal. The page header includes the school board logo and the text "Orleans Parish School Board" and "2017 Charter School Request for Applications". Below the header, there are navigation links for "Home" and "Submissions". A personalized greeting "Hi, Peter" is followed by the message "You haven't submitted anything yet." A section titled "Create a new submission?" prompts the user to "Please fill any of the necessary information shown below (if applicable) to get started." Under the heading "Category:", there is a dropdown menu with the following options: "--Please Choose--", "--Please Choose--", "Existing School Operators", "Experienced Charter Operators", and "New Operators". A blue arrow points to the dropdown menu. Below the category selection is a "Get Started" button. At the bottom of the page, there are links for "Terms of Use" and "Privacy Policy".

Orleans Parish School Board  
2017 Charter School Request for Applications

Home  
Submissions

Hi, Peter  
You haven't submitted anything yet.

Create a new submission?  
Please fill any of the necessary information shown below (if applicable) to get started.

Category:

--Please Choose--  
--Please Choose--  
Existing School Operators  
Experienced Charter Operators  
New Operators

Get Started


Terms of Use Privacy Policy



# Submit Documents via Fluid Review

- ▶ Sign-in to Fluid Review
- ▶ If your organization has not started an application for this year, select **Create a New Submission**
- ▶ Select your application type
- ▶ Enter a name for your application submission
  - ▶ The title of your application should be the **SCHOOL NAME** of the school you intent to open
  - ▶ If your school name and CMO name are separate, please format as **CMO – SCHOOL NAME**
- ▶ Select **Get Started** to create your new submission

[Resources & Attachments](#) [Web Links](#) [Resources](#) [Settings](#) [Help](#)



## Orleans Parish School Board

2016 Charter School Request for Applications

[Home](#)

### Submissions

Your Tasks

| Task                                   | Status            | Actions                  |
|--|-------------------|--------------------------|
| Part 1: Notice of Intent & Eligibility | <b>INCOMPLETE</b> | <a href="#">Continue</a> |

Please upload a single pdf document to submit the Part 1: Notice of Intent and Initial Eligibility Determination

Hi, T  
You haven't submitted anything yet.

**Create a new submission?**

Please fill any of the necessary information shown below (if applicable) to get started.

Category:

Please enter a name for your submission:



# Renaming your application



- ▶ To edit the name of your application, select **Edit Information**
- ▶ You will have the opportunity to edit the name of your application
- ▶ Select **Save** to save the changes you have made

This screenshot shows the top portion of the Orleans Parish School Board's application portal. At the top right, there are links for "Resources &amp; Attachments", "Web Links", "Resources", "Settings", and "Help". On the left is the school board's logo. To the right of the logo, the text reads "Orleans Parish School Board" and "2016 Charter School Request for Applications". Below this, there is a breadcrumb trail: "Home » New Submission - TK". The main heading is "New Submission - TK (11NO-0008)". Underneath, it says "Application Round". On the right side of the page, there is a yellow box containing an "Edit Information" button, a "Progress" section, and a message stating "This submission is 0.0% complete. You still need to:". A large blue arrow points from the bottom right towards the "Edit Information" button.

This screenshot shows the "Edit Submission" form for the application. At the top, it says "Home » New Submission - TK". The form title is "Edit Submission New Submission - TK". Below the title, there is a prompt: "Please enter a name for your submission". To the right of this prompt is a text input field containing "New Submission - TK". At the bottom of the form, there are two buttons: "Save" and "Cancel". A large blue arrow points from the bottom center towards the "Save" button.



# Managing your application



- ▶ To add additional members to your application, select **Add Member**
  - ▶ You can set access for new members (Owner, Standard User, Read-Only)
- ▶ To remove members or modify member access, select **Edit Members**
- ▶ To withdraw your application, select **Withdraw Application**
  - ▶ You will be asked to confirm that you wish to withdraw the application
  - ▶ Please note, if you select **ok**, your team will no longer be able to access your application and this action cannot be undone.

A screenshot of the Orleans Parish School Board's application management interface. The page title is "Orleans Parish School Board" and the subtitle is "2016 Charter School Request for Applications". The main content area shows "New Submission - TK (TINO-0008)" and "Application Round". Below this is a table with columns for Task, Deadline, Status, and Actions. The table contains one row: "Part 1: NOI and Eligibility Packet" with a deadline of "01/29/2016 12:00:00 PM CST", a status of "INCOMPLETE", and an action of "Start". To the right of the table are buttons for "Edit Information", "Progress", and a list of tasks to be completed, including "Complete task 'Part 1: NOI and Eligibility Packet'", "Complete proposal", and "Coversheet".

A screenshot of the "Members" management panel. It shows a list of members, currently only "T Knox (Owner)". Below the list are three buttons: "Add Member", "Edit Members", and "Withdraw Application". A large blue arrow points from the "Progress" section of the screenshot above to this panel.



# Submitting Your Documents

# Charter RFA Part 1: Notice of Intent & Eligibility

## Submit via Fluid Review



- ▶ Guidance and directions for Part 1: Eligibility and Prospectus are posted on the Fluid Review Application page
- ▶ To start Part 1: Eligibility and Prospectus Packet, select **Start**

The screenshot shows the Fluid Review application interface for the Orleans Parish School Board. At the top, there is a navigation bar with "Web Links", "Settings", and "Help". The main header includes the school board logo and the text "Orleans Parish School Board" and "2017 Charter School Request for Applications". A green notification bar states "Your submission has been created." Below this, the breadcrumb "Home » Peter Pan's Application" is visible. The application title is "Peter Pan's Application (NO-0005)". A highlighted section titled "Part I: Eligibility and Prospectus" contains the instruction: "For instructions on Part I: Eligibility and Prospectus, please review Fall 2017 Part 1 Application Guidance." Below this, a red deadline notice states: "Deadline for all participating applicants is 12:00 p.m. CDT on Monday, August 7, 2017." A link for "Eligibility and Prospectus Submission" is provided, along with instructions to use the template provided by OPSB and save documents as a single PDF file named "OPERATORNAME.2017Prospectus.pdf". A table lists the tasks, with the first row showing "Part I: Eligibility and Prospectus Packet" with a deadline of "08/07/2017 12:00:00 PM UTC", a status of "INCOMPLETE", and a "Start" button. A "Members" section on the right lists "Peter Pan (Owner)" and includes buttons for "Add Member", "Edit Members", and "Withdraw Submission". At the bottom, there is a note about using templates and including teacher certifications. Two blue arrows point to the "Start" button and the "Eligibility and Prospectus Submission" link.

Orleans Parish School Board

2017 Charter School Request for Applications

Your submission has been created.

Home » Peter Pan's Application

Peter Pan's Application (NO-0005)

Part I: Eligibility and Prospectus

For instructions on Part I: Eligibility and Prospectus, please review Fall 2017 Part 1 Application Guidance.

Deadline for all participating applicants is 12:00 p.m. CDT on Monday, August 7, 2017.

[Eligibility and Prospectus Submission](#)

Use the template provided by OPSB to prepare your submission. When you have compiled all required documents, save them as a single PDF file, named according to this convention OPERATORNAME.2017Prospectus.pdf.

| Task                                      | Deadline                   | Status     | Actions |
|---|----------------------------|------------|---------|
| Part I: Eligibility and Prospectus Packet | 08/07/2017 12:00:00 PM UTC | INCOMPLETE | Start   |

Use the templates provided here: [Fall 2017 Charter RFA Part 1 - Forms](#).  
In addition, please be sure to include copies of your identified teachers LA Teacher Certifications.

Members

- Peter Pan (Owner)
- Add Member
- Edit Members
- Withdraw Submission

# Charter RFA Part 1: Notice of Intent & Eligibility

## Submit via Fluid Review



- ▶ To submit Part 1: Eligibility and Prospectus, first collect all of the required documents
- ▶ Save all documents in a single pdf document.
  - ▶ Please name your pdf according to the following naming convention: NAME OF OPERATOR.2017Prospectus
- ▶ Select **Choose File** to locate the document on your computer or device
- ▶ Select **Submit** to complete

The screenshot shows the Orleans Parish School Board website interface. At the top right, there are links for "Web Links", "Settings", and "Help". The main header includes the school board logo and the text "Orleans Parish School Board" and "2017 Charter School Request for Applications". A breadcrumb trail reads "Home » Peter Pan's Application » Part I: Eligibility and Prospectus ...". Below this, a "Back" button is visible. The main content area is titled "Part I: Eligibility and Prospectus Packet" and contains instructions: "Use the templates provided here: Fall 2017 Charter RFA Part 1 - Forms. In addition, please be sure to include copies of your identified teachers LA Teacher Certifications." A yellow-bordered form box contains a "Document:" label, a "Choose File" button (highlighted with a blue arrow), the text "No file chosen", and a "Submit" button. To the right of the form, a box titled "File Types Supported:" lists "Portable Document Format File (.pdf)".

# Charter RFA Part 1: Notice of Intent & Eligibility


## Submit via Fluid Review



- ▶ Your submission is now recorded
- ▶ You will see that Part 1: NOI and Eligibility Packet is now **Complete**
- ▶ To view your submitted document, select **View**
- ▶ If you need to make changes or remove the document you have uploaded, select **Edit** or **Delete**

A screenshot of the Orleans Parish School Board's submission portal. The page title is "Orleans Parish School Board" and the subtitle is "2016 Charter School Request for Applications". The page shows a "New Submission - TK" with a status of "COMPLETE". A table lists the task "Submit Part 1: NOI and Eligibility Packet" with a deadline of "01/29/2016 12:00:00 PM CST" and a "View" link. A blue arrow points to the "View" link. On the right, there are buttons for "Edit Information" and "Download submission", and a "Progress" section indicating the submission is 6.2% complete with a list of tasks to be completed.


Resources & Attachments Web Links Resources Settings Help

 **Orleans Parish School Board**  
2016 Charter School Request for Applications

[Home](#) » [New Submission - TK](#)

**New Submission - TK** (TINO-0008)

**Application Round**

| Task  | Deadline                   | Status   | Actions              |
|---|----------------------------|----------|----------------------|
|  Submit Part 1: NOI and Eligibility Packet | 01/29/2016 12:00:00 PM CST | COMPLETE | <a href="#">View</a> |

All prospective applicants must complete Part 1 of the 2016 RFA of Intent and Eligibility Packet **AND** must receive confirmation of eligibility from the OPSB Charter School Office **BEFORE** submitting a full application.

The OPSB Portfolio Office will provide prospective applicants with a single review of eligibility documentation prior to the submission deadline. Applicants wishing to receive an Early Eligibility Review must submit documents no later than 12:00 p.m. CST, Wednesday, January 20, 2016.

Upload your NOI and Eligibility Packet here. Use the template provided by OPSB to prepare your submission. When you have compiled all required documents, save them as a single PDF file, named according to this convention OPERATORNAME\_NOI.pdf.

[Edit Information](#)

[Download submission](#)

**Progress**

This submission is 6.2% complete. You still need to:

- [Complete task "Proposal Coversheet"](#)
- [Complete task "Proposal Narrative"](#)
- [Complete task "Attachment 1: Curriculum Plans"](#)
- [Complete task "Attachment 2: Academic Standards"](#)
- [Complete task "Attachment 3: Calendar & Schedule"](#)
- [Complete task "Attachment 6: School Leader Docs"](#)
- [Complete task "Attachment 7: ..."](#)