WEB APPLICATION USER GUIDE 9.0

# **Course Provider User Manual**



IDAHO DEPARTMENT OF EDUCATION STUDENT ENGAGEMENT | ADVANCED OPPORTUNITIES

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# **PROGRAM SUPPORT**

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Additional resources are available on the Advanced Opportunities website: http://www.sde.idaho.gov/student-engagement/advanced-ops/index.html

See the Training tab for further resources.

# **PROGRAM OVERVIEW**

## **Advanced Opportunities**

The Advanced Opportunities program provides every student attending an Idaho public school in grades 7-12 an allocation of \$4,625 for certain courses and exams, in which a student may incur a cost. These include:

- **Overload Courses**: An overload course is a high school level course that is taken more than a full course load and outside of the student's regular school day. These courses can be offered online, during the summer, and/or before or after school. If a student incurs a cost for such courses, the Advanced Opportunities program can pay up to \$225.00 for the cost of the course.
- **Dual Credit Tuition:** Students earn dual credit by taking courses that are recorded on both a high school and a college transcript. The Advanced Opportunities program can pay up to \$75.00 per credit. Dual Credit courses can be taken in a student's high school, online, by virtual conferencing, or in some cases directly on the college/university campus. More information on specific Idaho colleges and universities can be found in the Links Tab on the Advanced Opportunities <u>website</u>.
- Exams: A student can utilize funds to pay for a variety of exams and proctoring fees.
   Exams include Advanced Placement (AP), International Baccalaureate (IB), College Level Examination Program (CLEP), college entrance exams, and Career & Technical Education (CTE) exams. A full list of qualifying exams and the maximum reimbursement possible is available in the Resource Files on the State Advanced Opportunities <u>website</u>.
- Workforce Training Courses: Students may use funds to cover the cost of approved, regionally in-demand workforce training courses or apprenticeships that are not available at their high school. These opportunities must be provided by an Idaho public technical college, lead to an industry-recognized certificate, license, or degree, and allow high school students to participate.

Students attending accredited private high schools in Idaho may access up to \$2,500 in Advanced Opportunities funding for dual credit (excluding out-of-district payments) and exams (excluding proctoring fees) only.

*Remedial or repeated content is ineligible for funding through the Advanced Opportunities program.* 

A course that can be considered for both AP exam or dual credit eligibility may only have ONE funding request submitted for either the AP exam OR the dual credit course. Advanced Opportunities funds cannot be used for both AP and dual credit funding for the same course.

## Challenging Courses

A student may achieve credit for coursework by demonstrating mastery of a subject's content standard, each school district will have policies on how a student can demonstrate mastery and is required to have criteria on how students can challenge courses. it. If the student meets the level of mastery set by the local school board for a given set of standards, the school can grant the student high school credit without requiring that the student take the course.

# Early Graduation Scholarship

Early Graduation Scholarships are available for students who graduate at least one full year early from an Idaho public high school. These scholarships are equal to 35% of the Average Daily Attendance (ADA) for secondary school students in a given school year. This equates to roughly \$2,400.

Scholarships can be used at Idaho public post-secondary institutions. This has been determined to include workforce training programs. The school district from which the student graduates early will also receive the same amount in scholarship funding as the student, regardless of whether the student utilizes the scholarship or not.

Students must apply for the scholarship through the Advanced Opportunities portal using the student login. Schools must code the students as an early graduate, using the appropriate ISEE exit codes of 4G, 4H, or 4I, and the postsecondary institution must confirm enrollment before funds will be sent directly to the institutions in the term during which the student begins the postsecondary program.

# **PROCESS FLOW**

- 1. Students register for courses/exams.
- 2. Funding requests are made in the Advanced Opportunities portal by student/district.
- 3. School approves requests.
- 4. Provider verifies the enrollment of the course/exam.
- 5. The school district submits a request to Idaho Department of Education for payment.
- 6. The Idaho Department of Education reviews/approves requests.
- 7. Payment is sent to the provider or school district.

8. Upon conclusion of the course/exam, if any students were unsuccessful, college or school district staff add a flag to students' account.

## **Funding Information**

## **Dual Credit**

If a student is taking a course from an Idaho post-secondary institution, the institutions have agreed to sponsor the charge if the student has an approved request submitted in the Advanced Opportunities portal, knowing payment will be arriving at the end of the term. The state will pay Idaho institutions (including Northwest Nazarene University, Brigham Young University-Idaho and Independent Study in Idaho) directly. Those funding requests not associated with an Idaho provider will be paid to the school district.

## Overload

If the student is taking an overload course, the state will pay IDLA (Idaho Digital Learning Academy) directly. All other course providers (e.g. out-of-state providers) may require payment up front. The Idaho Department of Education will pay the district for the approved request at the end of the term. If the family prepaid the course cost, the district would reimburse the family for courses funded through Advanced Opportunities.

### Exam

If the student is taking an exam, the exam provider may require prepayment for the exam. Some districts prepay this cost, while others have families pay for the exam. At the end of each term, the Idaho Department of Education will send payment for approved exams to the district. If the family paid, the district would reimburse the family for exams funded through Advanced Opportunities (up to the limits allowed).

### Early Graduation Scholarship

For the Early Graduation Scholarship, funding will be sent directly to the post-secondary institution at the beginning of the term in which the student starts. The approved district funding will be sent directly to the school district.

## End of Fiscal Year

It is critical that all deadlines are met. Idaho Statute 33-46 requires that all requests are made prior to the end of the fiscal year (June 30<sup>th</sup>). The system does allow for make-up payments between terms within the school year, however, these requests may only be entered if allowed by course providers (excludes nonpublic schools).

# **PORTAL ACCESS**

To gain Advanced Opportunities portal access<u>as a school district or college/university</u> <u>representative</u>, a new user will need to create an ISEE account.

- First create an account by registering an email. <u>https://auth.sde.idaho.gov/Other/Registration/Register</u> (If your organization does not appear when creating an account, type and select District/Organization Not Listed).
- 2. Have user permissions assigned to the account.
  - a. After creating an account, please contact the Advanced Opportunities Support Team to have the correct user permissions assigned to the account for Advanced Opportunities. College staff working only in workforce training will be provided the workforce training user role. Other roles may include college user role (for dual credit) or scholarship role (for early graduation scholarship).

Upon entering the portal, the following options will appear across the top:

|--|--|

*If these options are not visible, please contact the Help Desk to ensure that the correct role has been assigned.* 

## College User

The College User has the following menus:



# **COURSE CATALOG**

It's up to the course provider to maintain a current list of dual credit courses to ensure that school districts can make them available to school staff and students. This feature can be found

by selecting "Manage Course Catalog" from the "Course Catalog" tab. Select the school year when prompted. The College User may add individual courses via this screen or may upload an entire catalog via the "Upload Course Catalog" screen. Users may also edit individual records on this screen.



To add an individual record, click "Add New Record." The following screen will appear:

#### Manage Course Catalog

The table below lists all courses offered by your institution. To add a new course, click add new. To remove a course, click delete. To search for specific courses, use the filter function at the top of each column. Save changes when done.

noor rear.	20	21-2022	*										
✓ Save cha	inges	© Cance	l changes	+ 4	Add new re	cord							

The College User will enter the course name, institution course (a local course number descriptor), number of credits, cost per credit, total course cost, semester/trimester availability, course type (use the dropdown menu select dual credit), and CIP code (for workforce training courses only).

# Once the course information has been entered, the User must click "Save Changes" or all the entered information will be lost.

For consistent naming conventions, the Idaho Department of Education requires that providers enter the course code followed by the course name. This will allow district personnel, students, and parents to register with ease.

#### Example: **POLS 101 Political Science**

Additionally, the course providers must indicate the terms during which the courses will be made available to students. "Allow" indicates that courses are open for enrollment. "Disallow" indicates that courses are closed for enrollment. Please note that the summer is the start of the next school year in the Advanced Opportunities portal. For example, Summer 2024 belongs to

the 2024-2025 school year. To allow a course, the User will simply click on the word "Disallow" and select "Allow" from the drop-down menu, then save changes before moving on to another screen.

This is also the screen from which the User can edit an individual course record. To do so, click on the item that needs edited. Add the correct information and click "Save Changes."

## Catalog Upload

At the beginning of the school year, course providers can upload a new catalog in the form of a CSV file. When doing this, it will override the previous catalog for the year being uploaded and any settings associated with it. Therefore, it is recommended that this be done only in between terms.

To upload a catalog, the User will:

- 1. Go to College User / Course Catalog / Upload Course Catalog.
- Download the "Course Catalog Templates" file. Find in-depth information for completing the template via the "Template Upload Directions and "All Courses" documents found in the upload section of the portal.
- 3. Fill out the template as follows:
  - School Year: Type in the end year of the applicable school year, for example enter "2025" for the 2024-2025 school year *Course Name:* Type in the name of the course. Use proper naming conventions such as "ENGL 101 English Composition"
  - Credit Number: Enter the number of credits such as "3"
  - Credit Cost: Enter the cost per credit, such as "75"
  - Available Summer: Identify if the course is offered during the summer term. Enter "Y" for Yes and "N" for No
  - Available Fall: Identify if the course is offered during the fall term. Enter "Y" for Yes and "N" for No
  - *Available Spring:* Identify if the course is offered during the spring term. Enter "Y" for Yes and "N" for No
  - *Course type:* Enter Overload Course, Dual Credit, or Workforce Training to identify the type of course being uploaded
  - Institution CourseID: Enter the institution's unique course ID
  - *CipCode:* Enter the Classification of Instructional Programs code for the associated course (for workforce training courses only.)

- 4. Do not leave any information blank. This will result in an error and will require another upload. Use the Column Format and Mappings file if you need assistance in completing your file.
- 5. When finished, save the file in **.CSV format**. This format preserves the file information for upload to the system.



- 6. Return to the Upload Course Catalog Page of the portal. Select "Choose File" to select your file. Locate the file on your computer and click on "Upload Course Catalog."
- 7. To confirm your courses have successfully uploaded, return to Manage Course Catalog, select the appropriate year, and you should be able to view your courses.

Under the Course Catalog dropdown menu, the College User will have the option to manage the course catalog once it has been uploaded.

# **STUDENT ACCOUNTS**

Under the Student Accounts tab, the User can use the Student Lookup Tool.

## Student Lookup

The Student Lookup Tool will allow the User to view relevant student information when entering the EduID of a student. This page will provide a snapshot of where the student has used funds, how much funding remains, and whether there are flags. Please note that this information is to remain confidential and is only to be used to inform accurate participation in Advanced Opportunities programs. If a student has not submitted a funding request for a course at your institution, you will be unable to view their information.

College User  Course Catalog Student Accounts Verify Enrollment Reports	E + +	GS Manager 🔻	DOI	Student Lookup Tool Please enter EduID to see student's activity profile and click on "Lookup" button. EduID
ныр				Student EdulD Lookup

# Student Lookup Tool

To be directed to the student's activity profile, enter student's EdulD number, first name, and last name and click "Lookup."

EdulD
EdulD
First Name
First/Given Name
Last Name
Last/Family Name
Lookup
Lookup

# **VERIFY ENROLLMENT**

To view a list of all courses for which a funding request has been entered please select **Verify Enrollment / Verify Student Enrollment** as each course moves through the verification process, the status listed will change.

This view may be filtered by school year, term, course status, and school district. To populate information, select one or multiple filters and select "Populate Grid".

#### Verify Student Enrollment

The table below contains a list of all course funding requests. Check the box if the student funding request is accurate and the student is enrolled at your institution for the selected course. Use the filters at the top of each column to search for specific courses. Click on the course name to view details about the course, enter comments, or send the course for review.

School Year:			All Years	s	*																	
Term:			All Term	s	٣																	
Status:			All					v														
School Distric	et:		All Distri	icts				*														
Populate Gri	d																					
✓ Save char	nges	© Car	icel change	es	Export to	CSV																
Drag a column	heade	r and c	Irop it here	to g	roup by th	at col	umn															
Enrolled <b>Y</b>	Flagge	ed 🔻	School Year	Ŧ	District	T	School Name	۲	Term	T	Edu ID	Ŧ	Last Name	Ŧ	First Name	Ŧ	County	٣	Course Name	T	Status	Cre Nur

As courses are requested, they will be added to the queue, course providers will verify whether students are enrolled in these courses. The first column titled "Enrolled" has a check box available to verify enrollments. If a student is enrolled in the course, please verify their enrollment by checking the box that corresponds to the course. If a student is not enrolled in a course, leave the box blank. (You will want to send these courses for review if students fail to register by your institution's add/drop deadline.) Click "save changes" before moving to the next page.

When verifying enrollment, it is important that course details are carefully reviewed. If a course was entered as "Other" by school district personnel, the request should be moved to the 'Needs Review' status to have the school district deny the request and re-enter it using your course catalog. Generally, course funding requests should be selected from a prepopulated list provided by the course provider's catalog.

If you notice courses that are entered as "other" courses (not using the pre-selected courses as part of your course catalog), please contact the Idaho Department of Education.

For community colleges, it is especially important to check the county of residency. If the county of residency is incorrect, click on the course name and edit the county of residence before verifying enrollment.

### Funding Request Status

Funding requests will go through several statuses. This list includes each possible status and what it means.

Status:	Description:
Pending Initial Approval	The student has submitted a reimbursement, and the district has neither approved nor denied it.
School Level Approval Received	The school has approved the reimbursement, and
	the entry is still editable by district users.
Pending SDE Approval	The reimbursement has been submitted to Idaho Department of Education.
Clarification Requested	This course has an issue needing to be resolved.
	The issue is outlined in the notes section. School
	district personnel can re-approve this course.
Additional Reimbursement	Application was revised to pay out
	more. Revision requires additional funds from
	Idaho Department of Education. Revised after
	peing paid; means Requested Amount was
Approved	The reimbursement has been approved by Idaho
	Department of Education and is being prenared
	for payment.
Denied	The school/district/Idaho Department of
	Education denied the reimbursement.
Denied upon Revision	Application was denied upon revision. Initial
	payment made in error; all funds returned to the
	Idaho Department of Education.
Paid	The course has been paid.
Pending Program Funds	In the instance that funding requests have
	exceeded the total allowance of the entire
	this status until they are denied or approved
	funding
Refund to SDF	Application was revised to pay out less Revision
	requires return of funds to the Idaho Department
	of Education for overpayment. Revised after
	being paid; means Requested amount was
	lowered.
Rejected	The Idaho Department of Education has denied
	the reimbursement after it was originally
	paid/approved, generally at the request of a
	school district/course provider.

Note that school districts cannot submit data to the Idaho Department of Education until the enrollment verification for their district is completely matched with each course provider.

# **Clarification Requested**

For any course funding requests that need clarification or correction, Course Providers can move courses into a "Clarification Requested" status.

1. Click on the title of the course hyperlink.



2. Enter the reason in the Notes box and select "Send for Review." This will push the funding request into a separate report page for district personnel to resolve the issues that have been identified and re-approve or deny. *Providers may also send courses here for which students are not enrolled. School Districts are encouraged to frequently review and take action on courses in this status.* 

n:	12		
	Summe	r	
irse Name:	Advanc	ed CNA	
irse Provider:	College	of Southern Ida	aho
itution Course ID:	HWFA 1	100	
nber of Credits:	1.00		
t Per Credit:	199.00		
inty of Residence:	CASSI	A	
of District Tuition Reimbur	rsement: 🗸		
mbursement Requested:	199.00		
proved Amount:	199.00		
ars Available:	801.00		
imum Reimbursement:	199.00		
es:			
Euton acts then all	-1-		
Enter note then clie			
ubmit Updates Back to	Courses	end for Review	
ubmit Updates Back to Drag a column header and	Courses S	end for Review	
Ubmit Updates Back to Drag a column header and Note Text T This reimbursement has been denied by the school or district.	Courses S drop it here to group by that Submitted By T HarrCorr@d91.k12.id.us	end for Review column Date • • • 6/7/2018 12:35:32 PM	T
Drag a column header and Note Text This reimbursement has been denied by the school or district. Student submitted 2 requests for the same course. The district will take this request out.	Courses S drop it here to group by that Submitted By T HarrCorr@d91.k12.id.us HarrCorr@d91.k12.id.us	end for Review column Date ▼ 6/7/2018 12:35:32 PM 6/7/2018 12:35:32 PM	T
Ubmit Updates Back to Drag a column header and Note Text T This reimbursement has been denied by the school or district. Student submitted 2 requests for the same course. The district will take this request out. This reimbursement has been approved.	Courses S drop it here to group by that Submitted By T HarrCorr@d91.k12.id.us HarrCorr@d91.k12.id.us HarrCorr@d91.k12.id.us	end for Review column Date ▼ 6/7/2018 12:35:32 PM 6/7/2018 12:35:32 PM 5/23/2018 7:22:22 AM	T
Ubmit Updates Back to Drag a column header and Note Text T This reimbursement has been denied by the school or district. Student submitted 2 requests for the same course. The district will take this request out. This reimbursement has been approved. Course submitted by Grace Peters	COUITSES S drop it here to group by that Submitted By T HarrCorr@d91.k12.id.us HarrCorr@d91.k12.id.us HarrCorr@d91.k12.id.us pete.grac989@cloud.if	end for Review column Date ▼ 6/7/2018 12:35:32 PM 6/7/2018 12:35:32 PM 5/23/2018 7:22:22 AM 5/21/2018 3:11:47 PM	T

## **Enrollment Match**

The Enrollment Match function indicates the percentage of matching data between course providers and school districts (i.e., the number of courses funding requests made and the number of courses that have enrollment verified). Before a school district can submit data to the Idaho Department of Education, data must meet a 100% match with each course provider. Any school district with percentages less than 100% must be reconciled. A provider will work in partnership with the school district to ensure that all the data is correct.

#### **Enrollment Match**

The table below identifies the percentage of course funding requests that have been verified by the course provider. All percentages must be 100% for school districts to submit these requests to the SDE.

Export to CSV							
Drag a column header	and drop it here t	o group by that column					
District <b>Y</b>	School <b>Y</b> Year	College T	Term <b>T</b>	Number of Tourse Funding Requests	Number of Matched Enrollments	Needing Review T	Enrollment T Match
CASSIA COUNTY JOINT DISTRICT	2017-2018	College of Southern Idaho	Spring	1	1	1	100 %
TWIN FALLS DISTRICT	2017-2018	College of Southern Idaho	Spring	1	0	0	0 %
BOISE INDEPENDENT DISTRICT	2018-2019	College of Southern Idaho	Summer	2	0	0	0 %
JOINT SCHOOL DISTRICT NO. 2	2018-2019	College of Southern Idaho	Spring	2	2	2	100 %

Using the filter for enrollment match can be a great tool to help providers find districts still needing enrollment match. Using the filter select "is not equal to" and type "100". This will show districts that are not at 100% enrollment match.



Using filters from the Verifiy Student Enrollment screen will allow providers to find those students that either need to be verified or send to the district for clarification. For example, the User can sort by district and then select "is false" (meaning the enrollment box is not checked) to filter the Enrolled column of the report. This will show the User only those courses that haven't yet been matched for the district. The User may also export the file to a CSV, where the report can also be sorted to identify issues.

Courses sent to the review status are not considered part of the enrollment match process.

## **REPORTS**

Under College User / Reports, the User will find options for View Statements, View All Courses, Utilization.

## **View Statements**

Under "View Statements", the User can see all Advanced Opportunities billing statements and their detailed information for each student payment made for that billing cycle. The statements may be sorted by Fast Forward Billing or Out of District Billing (for community colleges). Early Graduation Scholarship billing statements are also found here.

#### View Billing Statements

The tab	ole below contain	s sta	atements for all tra	Ins	sactions related to stud	lei	nts from your institut	tio	on. Click on the State	em	ent Id number to	o vi	ew an itemized repo	rt	of each stateme	ent.
Billing	All		v													
Expo Drag a	ort Overview E	kpor and	t Transactions drop it here to grou	up	b by that column											
	Statement Id	T	Status	T	Paid To		Advanced <b>T</b> Opp Name	S T	Statement <b>T</b> otal	С	reation Date	r	Paid Date T		For OoDT	T

To see the details of any statement, the User may click on the statement ID number, with the arrow next to it. This will open a Billing Details screen which will identify the billing statement number, Advanced Opportunities program name, provider, billing item type, student name, course/exam name, and billing item amount. Users can export the billing statement to obtain additional information fields for each payment on the statement.

The various billing statements could be for:

- Early Grad Scholarship (WT)-workforce training early graduation scholarship payment
- Early Grad Scholarship-degree seeking student early graduation scholarship payment
- Fast Forward-dual credit or overload course payments
- Fast Forward (nonpublic)- dual credit course payments
- (County) Fast Forward-out-of-district payments

### Status could be:

- Received- A payment is owed to the Idaho Department of Education by the course provider and has been received.
- Paid- The Idaho Department of Education has made payment to the course provider.
- Not Yet Received- A payment is owed to the Idaho Department of Education by the course provider and has not yet been received.

- Unpaid- The Idaho Department of Education has generated a statement to the course provider, but has not yet been paid.
- Rolled Into Next Period- The funding for the statement will be rolled into the next statement payment.

## **View All Courses**

The View All Courses report allows Users to find details of student funding requests from current and prior years. The User may sort by school year, term, and/or course status, as well as filter the results within those selections.

### View All Courses

The table below contains information on all course funding requests that have been entered. Use the filters at the top of each column requests.

Term:	All Terms	w	
Status:	All		Ŧ
Function 001/			

The View All Courses Report details the following:

District Name	۲	School Name	۲	Edu ID	٣	Student	٣	Grade <b>T</b>	Provider	٣	Course Name	T	Status	٣	County	٣	Amount	٣	Enrolled	٣	Flagged <b>Y</b>	Detai	
																							100

This report may be exported to a CSV file. The export also provides available funding amounts for each student, out-of-district payments, and flag details.

### Utilization

The Utilization report provides useful information about the program usage, including total number of each type of course, number of credits taken, amount paid, and student count by school year.

#### **Utilization Stats**

The table below contains utilization statistics for the Advanced Opportunities programs. The numbers are generated by looking at courses that are currently in the "Paid" status meaning, the reimbursement has already been paid. These numbers do not include courses that are currently undergoing a revision, courses submitted to SDE, or those approved by SDE and awaiting payment generation. Export to CSV Drag a column header and drop it here to group by that column School Year T College Overload T Dual Credit Workforce Dual Credit T Dollars Paid Student Count T T I Courses Courses Training Credits Courses

# **COURSE PROVIDER DEADLINES**

Deadlines for student application data entry and data submission in the portal are set by the Idaho Department of Education for all school districts. Districts with exceptional circumstances may be able to adjust deadlines to meet local needs, but this can only be done after consultation with providers and with final approval from the Idaho Department of Education. Only the Idaho Department of Education can adjust these windows in the portal. To view deadlines, please visit the <u>Advanced Opportunities website</u> or your administrative portal for specific dates.

Below are the various definitions of the deadlines.

Term Student Access Verification Window Submission Deadline Window

- **Student Access Window:** This is the window during which a funding request can be made by students and Advanced Opportunities staff. All courses expecting funding must be entered by the end of this window.
- Verification Window: During this time, all course providers log into the portal to verify enrollments for all requests. Course providers and school districts will communicate with one another to work through any errors or missing information. District personnel adding or editing requests during this time, should only do so in collaboration with course providers. Only public-school personnel can add funding requests for students. Private schools do not have this ability. After course providers have completed this step, they will send out bills to students who are paying for courses out of pocket.
- **Submission Deadline**: Final deadline for school district to submit all funding requests to the Idaho Department of Education for payment.

Once course entries are approved by school users, course providers can begin to provide verification of course enrollment. Course providers will have a 6-week window to complete the verification process. Upon verification of all course enrollments, the school districts must submit data to the Idaho Department of Education by the dates noted above.

Upon the districts' submissions to the Idaho Department of Education, the course providers will have a one-week window (5 business days) during which they may access the data and use it to

finalize internal records. If errors are found during this process, please contact the Idaho Department of Education to correct these errors.

After submission, Idaho Department of Education staff will process all funding requests and send back any errors.

If course applications are entered into the portal past the recommended deadline, it is up to the course provider to determine whether to accept such registrations. The Idaho Department of Education recommends that any entries made after these deadlines be done with the consent of both the school district and the course provider.

The Idaho Department of Education will process all submitted data and may reach out to districts or course providers if any questions arise. Upon Idaho Department of Education approval, payments will be made to course providers and school districts.

# **STUDENT FLAGS**

Flags are indicators in the portal related to program eligibility. If a student has an active flag, this can be viewed using the View Flags page. To see the details of any flag a user may click on the flag and a pop-up window will provide any supporting details. An active flag is indicated with no date in the 'Cleared Date' column. If a date is present in the 'Cleared Date' column, the flag is not active.

## **Eligible Flag**

Green flags indicate the normal status of a student's Advanced Opportunities account.

## Unsuccessful Attempt Flag



When a student fails to earn credit for a class that was paid for by Advanced Opportunities, either due to withdrawal, failing grade, or non-completion, a flag must be entered on the student account. This allows all participants to know that the student needs to pay for and

successfully earn credit or complete one like course *before* any further course funding reimbursements can be made from Advanced Opportunities.

Once a flag is entered, the circle at the end of a student record will appear red. Flags may be entered by the district, the course provider, or the Idaho Department of Education. It is important to remember that students can also view the flags. Flag entering should be coordinated between the provider and the school for timely reporting and student planning.

Exam policies for Advanced Opportunities are set by the school district, with the exception of nonpublic schools. Flags are only required for unsuccessful course attempts, but can be applied for exams.

The following chart highlights the difference in rules between public and nonpublic school participation when they an unsuccessful course/exam is paid by the program.

Public v. Nonpublic AO Unsuccessful Course/Exam Chart

	Public Program	Nonpublic Program				
Courses						
What is an unsuccessful course?	Generally, a Withdraw "W" or Fail "F" as determined by the provider.	Generally, a Withdraw "W" or Fail "F" as determined by the provider.				
Student is unsuccessful in a course	The student must pay for and successfully earn credit or complete one (1) like course before the Idaho Department of Education may pay any further reimbursements for the student. This does not impact exam funding.	The student must pay for and successfully earn credit or pay for an exam before the Idaho Department of Education pays any further reimbursements for the student. This impacts all funding requests.				
Exams						
What is an unsuccessful exam?	Policy varies by school district. Minimum recommendation is to deem those who do not complete an exam paid by AO as unsuccessful.	An exam that has been registered and paid by AO in which the student did not complete the exam. Schools may expand beyond the Idaho Department of Education minimum.				
Student is unsuccessful on an exam	The public school shall determine whether the student must pay for and successfully pass an exam to continue receiving state funding. This does not impact course funding.	The student must pay for and successfully earn credit or pay for an exam before the Idaho Department of Education pays any further reimbursements for the student. This impacts all funding requests.				

# Should the cost of a course or credit numbers be considered in fulfilling the requirements to be reinstated for course funding through Advanced Opportunities?

A student can pay for and earn credit to be reinstated for further Advanced Opportunities funding. Course cost and number of credits are not needed for consideration to fulfill a student's obligation of paying for and earning credit. Students should be referring to their learning plans and career and educational objectives to determine the courses that they will take to fulfill requirements after having an unsuccessful course attempt.

## When is a course considered an unsuccessful attempt?

Grading policies and practices are determined by the provider of the course. Please refer to the provider regarding what is deemed an unsuccessful attempt. Generally, unsuccessful course attempts are when a student fails to earn credit in a course. Most commonly these are courses in which students withdraw or fail. To assist students, most Idaho colleges have provided a drop course deadline in which students can unenroll from the course, would not receive a grade and will not be charged. Dropped courses generally are not considered unsuccessful attempts. Incomplete grades are generally not determined as unsuccessful course attempts.

Terminology:

<u>Dropped course</u>-Student is not charged by Idaho college and does not receive a grade.

Withdrawn course- Student does not complete course and earns a withdraw grade (e.g. W).

<u>Failed course</u>- Student does not earn credit or certification and receives a failing grade as determined by the provider. (e.g. U, F)

<u>Incomplete course-</u> Incomplete grades are generally considered extensions to complete a course and are not considered a final grade. The final grade will determine whether the student was successful/unsuccessful (e.g. I).

## What if the grade received for the course was beyond the student's control?

Each provider has a grade appeals process, the student would be required to follow the provider's process. Advanced Opportunities will honor such outcomes.

# What happens when a student is unsuccessful in a course paid for by Advanced Opportunities?

Beyond the grade being reported on transcripts, a flag should be placed on the student's account in the Advanced Opportunities portal when it is realized the student is unsuccessful.

## How do we know when a student has unsuccessfully completed a course?

Unsuccessful attempts are denoted with a red flag in the Advanced Opportunities portal. These flags can be placed by any individual with access to the portal.

## Who can remove the red flag?

A flag can be removed by anyone who has access to that student's profile and has deemed the student has fulfilled the obligations of Advanced Opportunities rules.

## When should I remove the student's flag?

Any red flags placed on a student's account will need to be cleared before any further funding and payment can be made by the Idaho Department of Education for courses. When the flag is removed will depend on when the course is completed or when it is determined that student will successfully complete or earn credit and meet their obligation for Advanced Opportunities funding. Removing flags is generally at the end of each term.

# My student was unsuccessful last semester/trimester in one course and the next semester they plan to take multiple courses.

While there are various reasons for students' unsuccessful attempts, a student must meet program terms in order to be eligible for further funding.

### My student was unsuccessful in taking an exam, what is the policy?

For public school students', exams will have no effect on courses. For nonpublic school students' exams may have an effect on any Advance Opportunities funding.

## What happens when a student is unsuccessful in multiple courses?

Regardless of the number of courses a student was unsuccessful in when Advanced Opportunities funding was used, the student will need to pay for and earn credit for only one course or complete one like course before being allowed to use Advanced Opportunities funding for additional courses.

### Entering Red Flag

To enter a flag, go to the individual student account. This can be accessed through the "**Student Lookup Tool**" or by going to "**View Courses**" and searching through entered courses and clicking on the blue EDUID hyperlink of the student who requires a flag. Clicking on the hyperlink will take the user to the individual student record.

#### Student Flags

Student flags alert district users and course providers with notification related to the student's entire account. Student flags will pop up upon processing activity related to this student. Enter flags only if/when they affect the entire account (i.e., funds frozen due to failing grade). For comments or entries related to a specific course/exam, use the "comments" section in the course details.

+ A	dd new record									
Edu ID	Reason	Туре	Course/Exam Name ▲	Note	Created Date	Created By	Cleared Date	Cleared By		
8154	Failed	Overload(Co)			7/31/2020	AdvancedOpDistric			√ Update	^
	Failed								© Cancel	
8	Other	AP(Ex)	pretend AP	testing	7/9/2020	AdvancedOpDi	7/31/2020	Advance		
0	Other	ID/Ev)	1017 AVA0	tooting	e/E/2020	akuahiaudi	e/E/2020	akuahinudi		

Once in the student profile, "**Student Flags**" will appear near the top of the record. To add a flag, click on "**Add new record**." Enter specific details, as a student may have more than one flag in place at a time. Select the following: reason, type, course name failed, and notes.

- **Reason**: specify the reason the flag is being entered (Failed, Withdrew or Other)
- **Type**: specify the course type (overload, workforce training, dual credit, or exam type)
- **Course/Exam Name**: enter the course name (e.g. Math 123 Math in the Modern Society or Electrical Apprenticeship 1A)
- **Notes**: Please add any additional notes that would help others reviewing the flag to understand details (e.g. cost of the course, term, number of credits)

Example: "Failed, Workforce Training, Nursing Assistant, \$500 used in FA 2024"

Select "**Update**" to add the flag. The flag is editable.

#### **Clearing a Red Flag**

To clear a flag, an Advanced Opportunities Designee must go to the student profile and select "**Clear Flag**." The flag will show the user who cleared it and the date it was cleared. The flag should only be cleared once the student has fulfilled the terms of the flag (e.g. paying for the next course). It will remain as part of the student's record.

record								
Reason	Туре	Course/Exam Name	Note	Created Date	Created By	Cleared Date	Cleared By	
Other	Workforce Training(Co)	course 120	testing again	6/5/2020	skuchipudi	6/5/2020	skuchipudi	
Failed	Workforce	Plumbing Test	testing	7/14/2020	AdvancedO			/ Edit
i unou	Training(Co)	i unibility rest	tooting	1114/2020	Automocido			Clear Flag

## **Advising Flag**

Students who access Advanced Opportunities funds for more than 15 credits must receive postsecondary advising. When students reach this threshold, the circle at the end of their record will automatically turn yellow. A student will be ineligible for additional funding until they have been advised by a school district or college representative. Once the student has received advising, the yellow flag can be cleared by a college or school district User. *If a flag is both yellow and red, this indicates that the student needs advising and has an unsuccessful attempt flag on their account.* 

#### Clearing a Yellow flag

To clear the yellow advising flag, the advising party must go to the student profile and click the 'Student Received Advising' box in the Student Profile section.

#### Student Profile



### Warning Flag



When a student has \$500 or less of available funds in their account, a purple flag will automatically alert students and Advanced Opportunities Designees. This will be posted to the

student account so eligibility status can be seen by both student and Advanced Opportunities designee in the funding request report page when choosing courses/exams. Once a student has an approved expenditure "School Level Approval Received" the funding will be accounted for in the students total available funding.

*Pro Tip: Export to CSV will provide additional details into an excel document that can be easily filtered to create lists and find additional details of flag content.* 

# PAYMENTS

## Request of Change in Payment

Exams and courses once Approved and/or Paid by the Idaho Department of Education can only be changed by the Department. Should a change be needed after a funding request has been paid, the Idaho Department of Education will need to be notified by providing details of the request. The details should be submitted to the Idaho Department of Education in an OTIS (Online Tool for IT support) ticket providing the student's name, EDUID, term, exam/course, and reason for change. To submit an OTIS ticket, see the Help section in this manual.

Common change requests:

- Refund of Payment
- Additional Reimbursement
- Overpayment

*Repayment of a paid funding request should not be sent to the Idaho Department of Education unless specifically requested.* Changes in funding requests will be accounted for in the next statement cycle generated in the Advanced Opportunities portal.

## Nonpublic Payment Protocol

The nonpublic school program has a program total limit, this means that funding request that exceed this limit will likely need to be edited or reduced to comply with program totals. The following is the process in which funds will be reduced. All student funding requests must be made by the deadline noted in the Student Request Funding Window for each term. Any student funding requests that are made outside of the window would be subject to available program funds.

At the conclusion of the verification deadline, the Idaho Department of Education will total requested funds to delineate the option that will be needed beginning with Option 1 and lastly using Option 6 to meet the program spend allowances.

**Option 1:** All requests will be honored within the school year term.

**Option 2:** Requests made by the funding request window will receive priority. If funding requests made outside of the funding request window can be funded, requests will be given priority in order of the date closest to the submission deadline for the given term of the funding being requested.

**Option 3:** Requests made outside of the funding request window would be excluded from consideration. All college courses and a portion of all exams made by the funding request window would be considered.

**Option 4:** All courses submitted by the request funding window will be paid and no exam funding will be considered.

**Option 5:** Funding requests made by the request funding window will only be considered, no exams will be paid, and only courses taken by Idaho colleges will be paid. If able, a percentage of requests for out-of-state college courses could be considered.

**Option 6:** A portion of Idaho college course funding requests will be paid, no out-of-state college courses will be paid, no exams will be paid. No funding outside of the request window would be considered.

As a courtesy, the Idaho Department of Education will notify schools and providers of possible reductions based on funding requests submitted and evaluated at the conclusion of the Idaho Department of Education submission deadline for each term.

### Process Notes:

When corrections are needed they should be made as timely as possible to mitigate potential funding deductions for students. Missed funding requests may jeopardize student funding. An indication of program funding reductions will be noted when students have funding requests with the state "Pending Program Funds" associated with their request.

## EARLY GRADUATION SCHOLARSHIP MANAGER ROLE

Early Graduation Scholarships are available for students who graduate at least one full year early from an Idaho public high school. These scholarships are equal to 35% of the Average

Daily Attendance (ADA) for secondary school students in a given school year. This equates to roughly \$2,400.

Scholarships can be used at Idaho public post-secondary institutions. This has been determined to include workforce training programs. The school district from which the student graduates early will also receive the same amount in scholarship funding as the student, regardless of whether the student utilizes the scholarship or not.

Students must apply for the scholarship through the Advanced Opportunities portal using the student login. Schools must code the students as an early graduate using the appropriate ISEE exit codes of 4G (1-year early graduate), 4H (2-year early graduate), or 4I (3-year early graduate) and the postsecondary institution must confirm enrollment before funds will be sent directly to the institution in the term during which the student begins the postsecondary program.

The Early Graduation Scholarship (EGS) Manager will verify student enrollments and track scholarship payments. This role is only assigned to an eligible Idaho public post-secondary college. Prior to the beginning of each term, student enrollment will be verified. Students are required to apply by a deadline; any late applications will be delayed. The table below shows when the college should review enrollment and when payment will be sent.

College Term in Which Student Wants Scholarship Applied	Student Application Deadline	College Review Period	Payment Period
Summer	June 1	After July 1	Mid-July
Fall	August 1	After August 1	Mid-August
Spring	January 1	After January 1	Mid-January



## View EGS Applications

To verify student enrollments, the EGS Manager will go to EGS Manager / Reports / View EGS Applications. To verify enrollment, the EGS Manager can sort the report by student name, term, school year, student birth date, or EDUID. Once the enrolled student is found, the manager will

check the box in the "Is Enrolled" column. This will let the Idaho Department of Education know the student is enrolled and, if eligible, the scholarship can be awarded.

View EGS Applications
The table below lists students who are eligible for the EGS scholarship and have identified your institution as the institution they plan to attend. Check the box if the student is enrolled in your institution. Save changes.
To learn more information about the applicant(s), click "Export to CSV". The following information will be helpful interpreting the document columns:
First Year - indicates the first year the student plans to utilize the scholarship.
IsWTCollege - indicates whether the student is attending a workforce training program.
ExitCode - indicates the number of years the student graduated early, which will indicate the scholarship amount awarded. 1-Year Early Grad is noted as 4G, 2-Year is noted as 4H and 3-Year noted as 4I.
EGS Application Year: 2023-2024 v
✓ Save changes Scancel changes Export to CSV
Drag a column header and drop it here to group by that column
Is Enrolled         Y         First Year         Y         College         Y         First Name         Y         Last Name         Y         Birth Date         Y         EdulD         Y

To view all funding requests from all years and their status, select "Export to CSV". This will provide an excel document with all scholarship applications associated with your college and include details of the student, the year, the payment status and exit code (scholarship award).

Exit Code	Meaning
4-G	Student graduated at least one
	year early.
4-H	Student graduated at least two
	years early.
4-1	Student graduated at least
	three years early.

## View EGS Statements

Under View EGS Statements, the EGS Manager can see the scholarship payments that have been made to the school, which includes the statement number, the total paid, and the date the payment was made.

#### **View EGS Statements**

The tab	le below cont	ains sta	ater	nents for all t	transactions	s related to students fr	rom	n your institution. C	lick d	on the Statement ID	nun	nber to view an iter	nizec	I report of each s	tatement.
Expo	rt Overview	Expor	t Tr	ansactions											
Drag a	column head	er and o	dro	p it here to g	roup by tha	t column									
	Statement II	D ▲	T	Status	T	Paid To	T	Advanced Opp Name	T	Statement Total	T	Creation Date	T	Paid Date	T
×	544			Paid		College of Southern Idaho		Early Grad Scholarship		\$1,661.00		8/1/2017		8/4/2017	

To see the details of each statement, the EGS Manager can click on the Statement ID, which will then bring up a second screen with all the individual student records. The "Export to CSV" feature will bring up additional details of the payment made.

view EGS Billi	ng Details					
Export to CSV						
Drag a column header a	nd drop it here to group b	by that column				
Billing Statement T Number	Advanced Opp <b>T</b> Name	Provider <b>T</b>	Billing Item Type	Student T	Course/Exam T Name	Billing Item T Amount
544	Early Grad Scholarship	College of Southern Idaho	EGS Student		Early Graduation Scholarship	\$1,661.00

## EGS Payment Schedule

Payments will be made in a single payment according to the following schedule.

dvanced Oppor	tunities Portal EGS Dates	
	Payment sent to colleges by	Make-up payment sent by
Fall 2023	August 18	September 22
Spring 2024	January 12	February 09

## **HELP**



The Help feature in the Advanced Opportunities portal provides a means to communicate information with the Idaho Department of Education in a secure manner through the Online Tool for IT support (OTIS). **Do not send any personally identifiable information (PII) via regular email, the Idaho Department of Education staff cannot respond.** From the help page follow the on-screen directions:

Click: "Go to OTIS".

Submit a ticket by selecting "Create A Ticket".

Select "Web App (apps.idaho.sde.gov)" as the primary ticket type.

Select the Issue (most common are "Data Fix" or "Use Inquiry").

Select "Advanced Opportunities" in the category.

Input information in the description and add any attachments. Please avoid using PII in the summary.

#### HELP

Troubleshooting

Staff are requested to use OTIS to share student information. Please do not send emails with personally identifiable information. Follow directions below.

OTIS is a secure incident tracking application that can be used to share data. Personally Identifiable Information (PII) like student, teacher, or individual's information should be communicated through OTIS only. Users can create tickets, add notes or attachments and view or search any tickets created by them. Do not put any PII data in summary of the ticket. PII data should be in notes or attachments of the ticket.

Need to send secure information to the Idaho State Department of Education? Follow these steps:

- Step 1: Click, "Go to OTIS".
- Step 2: Submit a ticket. Select "Create A Ticket" from OTIS screen.
- Step 3: Select Ticket Type. For Advanced Opportunities select "Web App (apps.sde.idaho.gov)", select the issue, and select category as "Advanced Opportunities".

• Step 4: Avoid typing personal information in the Summary. Add any attachments. Select "Create Ticket".



# THANK YOU FOR YOUR DEDICATION TO IDAHO STUDENTS!

The Idaho Department of Education is appreciative of all the efforts put in by course provider personnel to ensure that benefits of Advanced Opportunities are paid out to Idaho students. Additionally, we are committed to ensuring effective implementation of these programs. If you have any questions, suggestions, or comments, please feel free to contact the Advanced Opportunities support team.