ADVANCED OPPORTUNITIES WEB-BASED PORTAL 5.0

District User Manual

IDAHO STATE DEPARTMENT OF EDUCATION
STUDENT ENGAGEMENT AND SAFETY COORDINATION | ADVANCED OPPORTUNITIES

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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.

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PROGRAM OVERVIEW

Advanced Opportunities

The Advanced Opportunities program provides every student attending an Idaho public school an allocation of $4,125.00 to use towards Advanced Opportunities in grades 7-12 (Idaho Statute 33-4602). The fund can be used for:

- **Overload Courses**: An overload course is a high school level course that is taken in excess of 12 credits and outside of the student's regular school day. These courses are offered online, during the summer, and/or before/after school. In the event that 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. Students who use Advanced Opportunities funds for more than 15 credits must receive postsecondary advising.
- **Exams:** Students can utilize Advanced Opportunities funds to pay for a variety of college-credit bearing or Career-Technical exams. These include Advanced Placement (AP), International Baccalaureate (IB), College Level Examinations Program (CLEP), or Career & Technical Education (CTE) exams. A full list of qualifying exams and their maximum reimbursements is available in the Resource Files on the State Advanced Opportunities website.
- **Workforce Training Courses:** Students may use up to $500.00/semester ($1000.00/year) 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.

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

Challenging Courses

Many school districts provide options for students to challenge courses for credit. In most cases, this means that a student would request to challenge a course by taking an exam. 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. Students are advised to contact their district Advanced Opportunities Designee for a list of courses eligible by each district for challenge under Advanced Opportunities.

Early Graduation Scholarship

Early Graduation Scholarships are available for students who graduate at least one full year early from a public high school. These scholarships are equal to 35% of the Average Daily Attendance (ADA) for a given school year. This equates to roughly $1,800.00.

Scholarships can be used at Idaho public post-secondary institutions. The award amount will double for students who graduate two years early and will triple for students who graduate three years early. The school district will receive the same amount as the early graduate's scholarship, regardless of whether the student utilizes the scholarship.

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.

Funding Information

If a student is taking a course from an Idaho post-secondary institution, the institutions have agreed to wait for a tuition payment, if the student has an approved request submitted in the Advanced Opportunities portal, knowing payment will be arriving at the end of the semester. The state will pay Idaho public institutions directly, other payments will be sent to a school district.

If the student is taking an overload course, the state will pay IDLA directly; all other course providers may require payment up front. The state will pay the district for the approved request at the end of the semester. If the families prepaid the course cost, the district would reimburse the families for courses funded through Advanced Opportunities.

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

For the Early Graduation Scholarship, funding will be sent directly to the postsecondary institution at the beginning term in which the student starts.

End of Fiscal Year

It is critical that all deadlines are met. Idaho Statute 33-4602 requires that all requests be made prior to the end of the fiscal year (June 30th). 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.

For missed/corrected prior year funding requests contact the SDE Advanced Opportunities Support Team.

TIME TABLE

Advanced Opportunities Portal Timeline 2019-2020

June							1
	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
July	30	1	2	3	4	5	6
	7	8	9	10	11	12	13
	14	15	16	17	18	19	20
	21	22	23	24	25	26	27
	28	29	30	31	1	2	3
August	4	5	6	7	8	9	10
	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
	25	26	27	28	29	30	31
September	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
October	29	30	1	2	3	4	5
	6	7	8	9	10	11	12
	13	14	15	16	17	18	19
	20	21	22	23	24	25	26
	27	28	29	30	31	1	2
November	3	4	5	6	7	8	8
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	20	30
December	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	31	1	2	3	4
January	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	29	30	31	1
February	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
March	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	29
April	29	30	31	1	2	3	4
	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	29	30	1	2
May	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
June	31	1	2	3	4	5	6
	7	8	9	10	11	12	13
	14	15	16	17	18	19	20
	21	22	23	24	25	26	27
	28	29	30				

Student request/Data entry window

Student request/Data entry deadline for school districts:
all funding requests must be entered/approved by this time

Verification window for colleges/universities and other course providers-correction of errors per communication between school districts and course providers

Summer submission deadline for school districts: August 16th

Student request/Data entry window-
during this time the SDE will be processing summer payments

Student request/Data entry deadline for school districts:
all funding requests must be entered/approved by this time

Verification window for colleges/universities and other course providers-correction of errors per communication between school districts and course providers

Data frozen for final college approval of course rosters
Fall submission deadline for school districts: November 8th

Student request/Data entry window

Student request/Data entry deadline for school districts:
all funding requests must be entered/approved by this time

Verification window for colleges/universities and other course providers-correction of errors per communication between school districts and course providers

Data frozen for final college approval of course rosters
Spring course submission deadline for school districts: May 1st

Spring exam submission deadline for school districts: May 22nd

End of Fiscal Year. All 2019-2020 funding requests must be entered in the portal.
No 19-20 entries will be submitted after this date.

DISTRICT NAVIGATION: SET UP

Staff Accounts and Roles

To gain Advanced Opportunities portal access, a new user will need to create an ISEE account. https://auth.sde.idaho.gov/Other/Registration/Register After creating an account, the superintendent or technology director in each school district can assign these roles via the Administration Application (i.e. Admin Tool) or you can contact SDE Help Desk.

There are four types of district users: **Advanced Ops District Management, Advanced Ops District, Advanced Ops School, and Advanced Ops Business Manager**

: This user is responsible for overseeing all district level data and submitting funding requests to the SDE. This person has privileges to allocate course assignments.

: This user is usually a district level staff member or someone who supports many schools within the district with funding requests, but does not submit funding requests to the SDE.

: This user has school level access to help with funding requests.

: This user is typically a district level staff member who can view statements and payments only.

These roles can be found in the Academics Hierarchy of the Admin Tool. Users only need one role consistent with the highest level of access that they need. Do not assign multiple roles to a single account. For assistance accessing the portal, you can contact the SDE Help Desk at (208) 332-6987.

- ***Advanced Ops District Management****:* This role should be provided to *only one* person in the school district. District Managers will be responsible for submitting the final data to the State Department at the end of each term.
- ***Advanced Ops District:*** This role should be provided to a staff member who will be approving and editing registrations submitted by your students. This user will have access to district-wide data. This user will have the ability to approve student accounts, funding for courses, and editing privileges until the point of submission.
- ***Advanced Ops School:*** This role should be provisioned to a staff member who is overseeing approvals in just one particular school. This person will be able to see student data pertinent only to one school. The user will have the ability to approve student accounts, funding for courses, and editing privileges until the point of submission.
- ***Business Manager:*** This role should be provided to the district's business manager. The business manager can review a detailed report of each payment that is made either to the school district or on behalf of the school district.

Application/Submission Windows

Application/submission windows have been set by the state, with input from school districts and the post-secondary dual **credit offices. Registration dates for 2020-2021 are:**

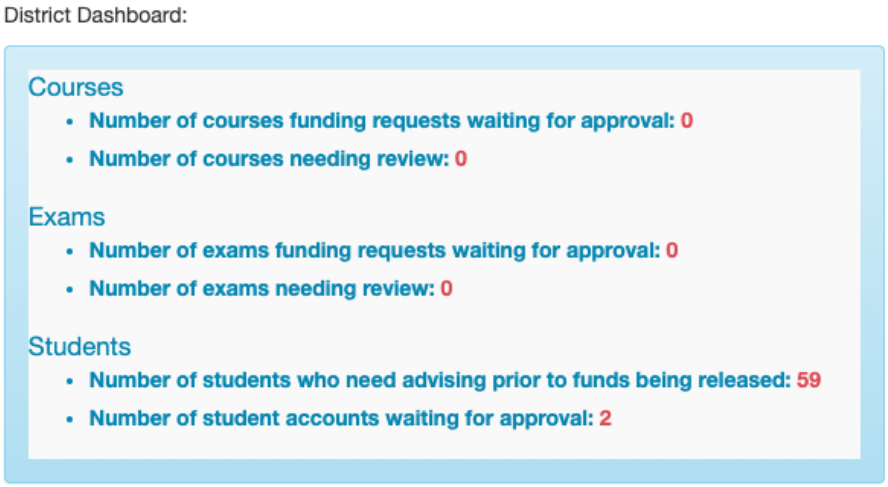
Term	Student Access/Data Entry Window	Verification Window (100% Match)	District Submission Deadline
Summer 2020	May 4 – June 26	June 29 – Aug 7	Aug 14, 2020
Fall 2020	Aug 24 – Sept 25	Sept 28 – Nov 6	Nov 13, 2020
Spring 2021	Nov 16 – Mar 19	Mar 22 – Apr 30	May 5, 2021 (courses) May 21, 2021 (exams)
Trimester 1	Aug 24 – Sept 25	Sept 28-Nov 6	Nov 13, 2020
Trimester 2/3	Nov 16 – Mar 19	Mar 22- Apr 30	Feb 7, 2020
Trimester 3	Feb 10 – Mar 27	Mar 30 – Apr 24	May 1, 2020 (courses) May 22, 2020 (exams)

- **Student Request/Data Entry Window:** This is the window during which a funding request can be made by students and Advanced Opportunities staff. It is critical that all courses that are expecting funding are entered by the end of this window.
- **Verification Window:** During this time, all course providers log into the portal to verify enrollment for all requests made by students. Course providers and schools district 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. After course providers have completed this step, they will send out bills to students who are paying for courses out of pocket.
- **District Submission Deadline:** After submission**,** SDE staff will process all funding requests and send back any errors. SDE staff will scan the data for the following: student flags, odd dollar amounts, incorrect course titles, duplicate requests, ineligible course providers, ineligible courses, and make-up payments. If courses are found in these categories, SDE staff will reach out to the school district for clarification or send the request back for further review.

Home Page

The Home Page in the portal contains vital information for program implementation. This landing contains general information about the Advanced Opportunities program, followed by a table with information about deadlines for the current school year.

The **"District Dashboard"** provides information about courses or exams that require approval or review. There is also a snapshot provided of the number of student accounts that need approval and the number of students with active advising flags. Staff will be able to click on the number for each description that will direct them to the appropriate webpage in the portal requiring the attention of the AO staff member. Please note, that the current year information will populate, if no information is available for the current year, it is likely a prior year has data that needs to be addressed. Select "All Years" from the School Year drop-down menu.

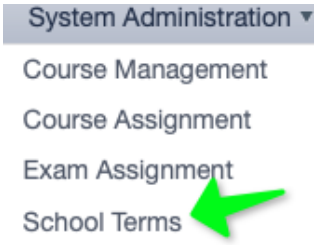


By scrolling to the bottom of the page, links to essential contacts are provided.

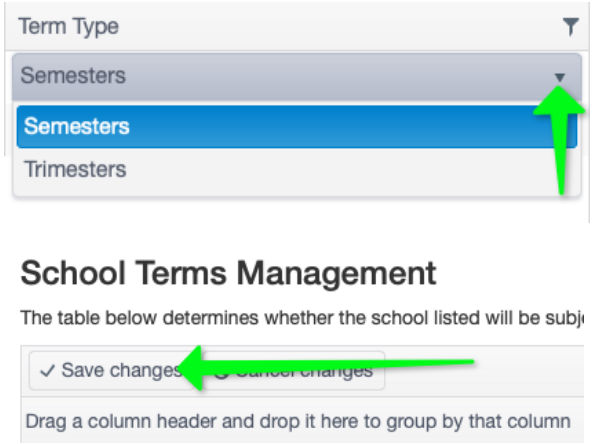
For questions regarding the use of the portal, contact your regional support specialist. Contact information is available for the for following individuals: dual credit staff, overload course providers, and early graduation scholarship coordinators.

School Terms

Schools have been pre-populated to function on a trimester/semester schedule. If the schedule setting in a particular school changes, the District Manager can change this by selecting **"School Terms"** under the **"System Management"** tab.

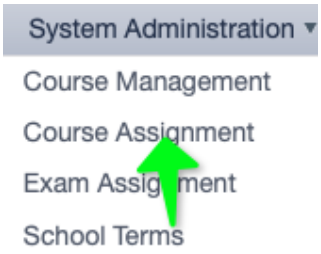


Users can toggle between terms by clicking on the individual **"Term Type,"** change between semesters and trimesters, and then select "**Save Changes.**"

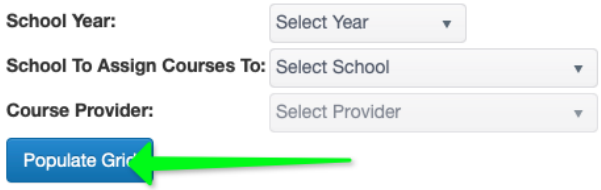


Course Assignment

Before students can log into and request for state funding, each school will need to set up a list of courses that are available to students. This will determine what students will see when requesting funds for a course. This will need to be done for each school separately by the District Manager. To do this, hover over the **"System Management** tab and select **"Course Assignment**":

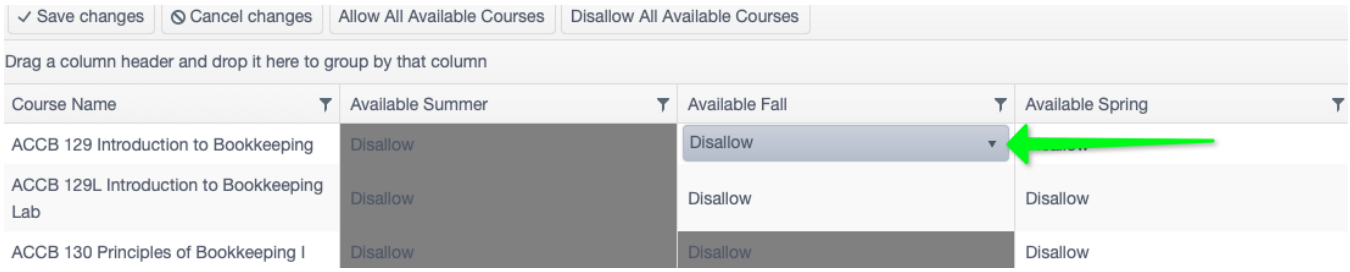


Select the appropriate information and click **"Populate Grid."**



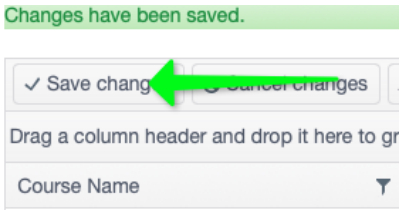
The following grid will appear.

In the grid, select **"Allow"** for the term during which the course will be available at the school. This will allow students to register for only the courses that your school offers. Courses from all post-secondary institutions are defaulted to **"Disallow".**

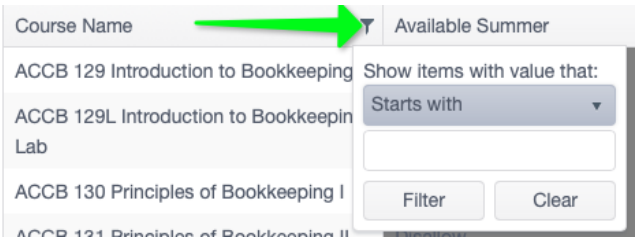


If a certain course does not appear in the list, please contact the dual credit coordinator at the post-secondary institution. The colleges and universities maintain these lists. If the field appears to be grayed out this means the provider has not made the course allowable for the term. In this case, please contact the provider to discuss the modification of terms for a given course.

After saving changes, these courses will be available for student registration.



Search for specific courses by using the filter function in the grid or alphabetize the names by clicking on the column header.



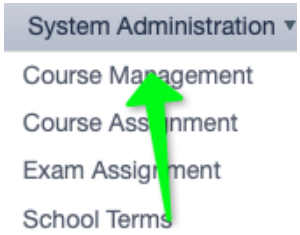
Special Cases

*High school courses available from **Idaho Digital Learning Alliance** do not need to be populated through this process. Courses by this provider are made available to all students by default. **Workforce Training Courses also do not need to be populated.***

Course Management

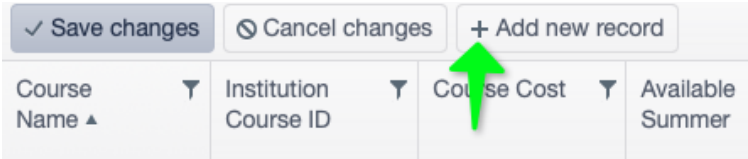
Many school districts offer in-district overload courses. These are overload courses that are taught by in-district teachers. In most cases, this comes in the form of advanced summer school, zero hour, or an after-school class. School districts can create a cost for this "extra" course, and Advanced Opportunities funds can be used to pay up to $225 per course.

To create a course catalog for such courses, go to the "**System Management**" tab and select "**Course Management**."

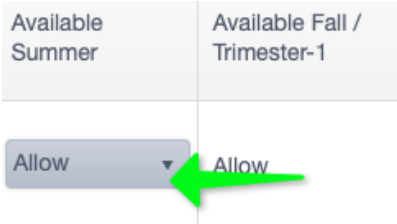


Select the relevant school year and click "**Show Courses**."

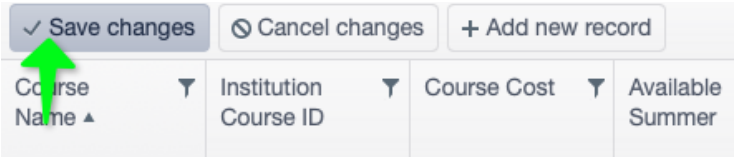
When the table comes up, select "**Add New Record**."



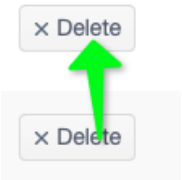
Enter the course name, course cost, and identify whether the course will be available during the summer, fall, and/or spring, by selecting "**Allow**" or "**Disallow**."



Then click "**Save Changes**."



To delete a course that is no longer offered by the school district, select "**Delete**" in the table. Then click "**Save Changes**."



The courses will now need to be "assigned" to each school in order to populate in the student and staff drop down menus. For instructions on how to assign courses, see "Course Assignments".

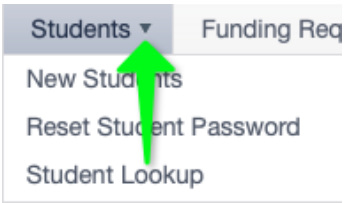
If a student is taking a dual credit course from a provider outside of the common AO providers, students can select either "Other" in the funding request or if the course is more commonly used, the course should be added to the school districts course catalog offerings by using the Course Management tool mentioned above..

DISTRICT NAVIGATION: STUDENT ACCOUNTS

Approving Student Accounts

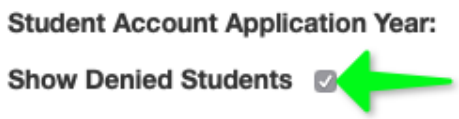
Note: Schools have the option of entering the student data themselves or allowing their students to do so. The following steps are for schools that allow students to enter requests into the portal and apply for Advanced Opportunities monies independently . If school districts would rather manage all registrations from a district level without giving students the ability to navigate the system, please see "Funding Request Generated by School/District Users".

When students create an account in the Advanced Opportunities Portal, the district Advanced Opportunities Designee must verify it before students can apply for state aid. To approve student accounts, select **"New Students"** under the **"Students"** tab.



This will generate a list of students who have requested to have an Advanced Opportunities account.

Check that the year in which the student applied for an account is selected, also, you may select **"Show Denied Students"** if needed.

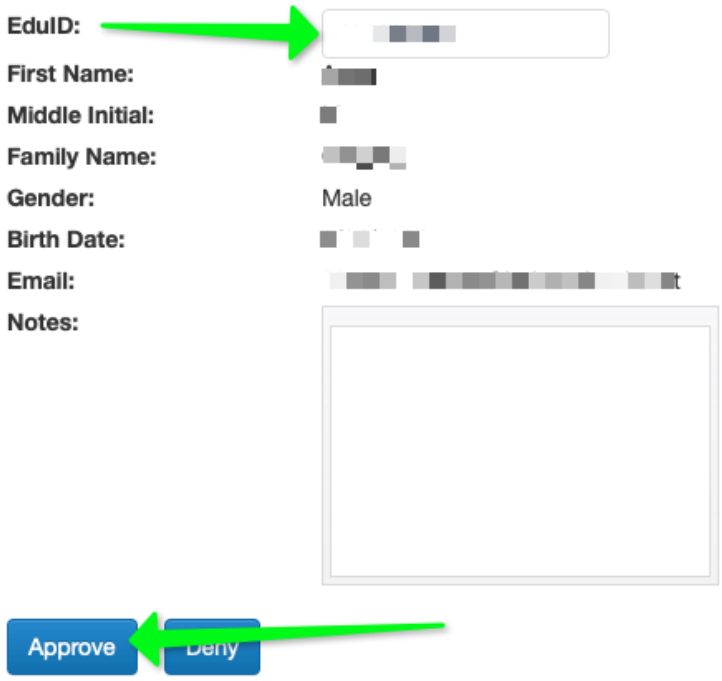


Select the **student's name** to see his/her account details.

To verify the account, enter/verify the student's EDUID.

This step is critical to the process, entering a student's EDUID incorrectly may impact the funding available to another student.

By approving a student's account, districts are verifying that the student attends an Idaho public school. This step allows students to access the system. Students will not be directly tied to a district's specific school for further registration and will be able to make a funding request at any school. *Note: This may be important if a student is attending public schools for funding requests).*



When a student's enrollment has been approved, the following message will appear:

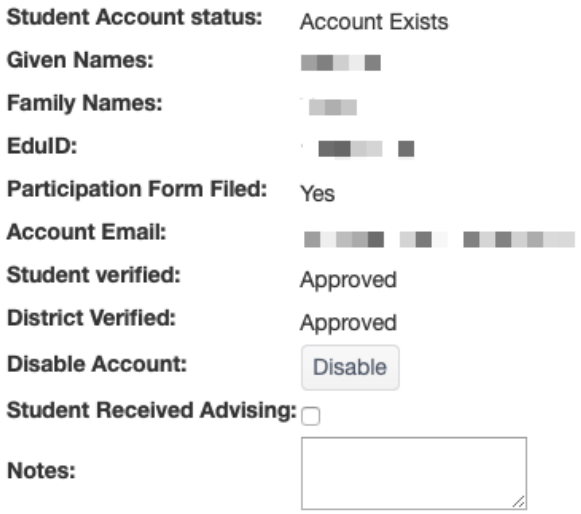
If the student has registered for an account, but the entry does not yet appear in your list, the student must check their email and follow the link to verify the account. If the district denies a student account, it will still appear in the district's list, but the status will simply be changed to "**denied**". If the student needs to have the verification email resent, have the student login, select "**Can't Log in?"** and have the verification email resent.

Participation Form

Students must have a **"Participation Form"** on file with the school district. These forms are available at the Advanced Opportunities website (http://www.sde.idaho.gov/student-engagement/advanced-ops/index.html); additionally, they appear in a link on the student login page. Participation forms only need to be signed by the students and their families once. They must be kept on file at the local school district. District staff will be asked for verification that this form is on file before submitting any funding requests to the state.

Student Lookup Feature

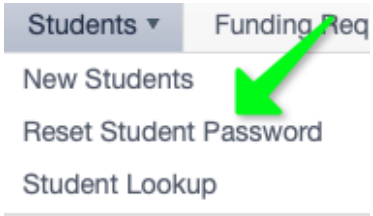
The student lookup feature enables Advanced Opportunities Designee to view the status and account details of a student. You can navigate to a student's profile by clicking on the EDUID from any table, or by selecting the "**Students**" tab and clicking on "**Student Lookup**." After entering the pertinent information, you will see the student profile.



- **Student Account status:** This field indicates whether or not a student has created an account.
- **Student verified:** This field indicates whether or not the student has verified the account in their email link.
- **District verified:** This field indicates whether or not the district Advanced Opportunities Designee has verified the student's account with an EDUID.

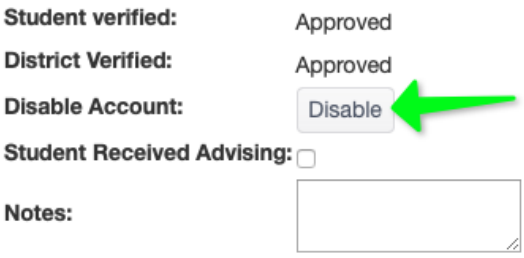
Reset Student Password

If a student forgot his/her password, it can be reset from the student log in interface by selecting **"Can't Log In?"** The student will have the option to reset the password. Advanced Opportunities Designees can also reset a password by selecting **"Students"** and selecting **"Reset Student Password."** A gibberish password will be sent to the student's email. Upon logging in with the gibberish password, the student can reset their password in their profile.



Student Cannot Access Old Account

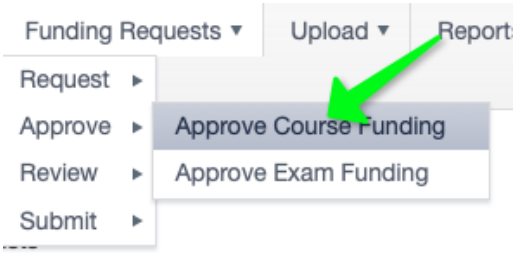
In rare instances students might not have access to an old email address under which their account was created. In this situation, you can look up the students account in the "**Students**" tab and select "**Student Lookup.**" By clicking disable, the student's previous account will be disabled, and the student can create a new account. Upon EDUID verification, the student's previous activity will merge with the new account.



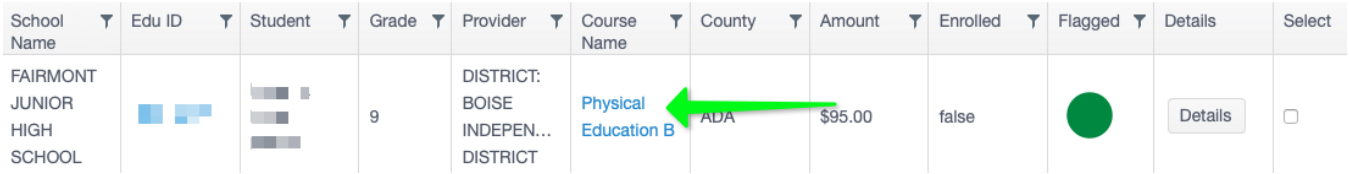
DISTRICT NAVIGATION: MANAGING FUNDING REQUESTS

Approving Funding Requests Entered by Students

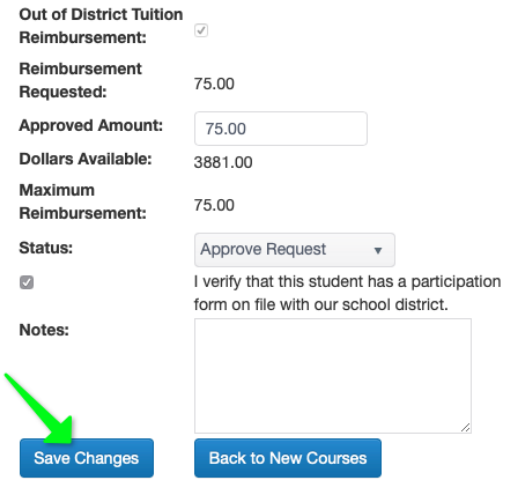
The district Advanced Opportunities designee will need to approve or deny all course and exam requests submitted by students. The student's accounts will not be charged until this approval occurs. To approve submissions, select "**Funding Requests,**" then "**Approve,**" then "**Approve Course Funding.**"



Select the school year to view. Each course/exam will need to be approved individually. Click on the course/exam name to see and edit the details of the funding request.



Look over course/exam information carefully. Make any necessary corrections. Use the drop-down menu in the ***Status*** field to determine if the request will be approved or denied. Then select **"Save Changes."** If the course/exam is denied, enter the reason for this decision.

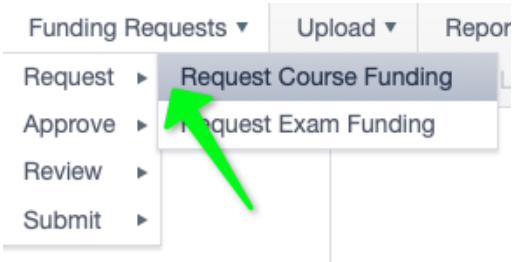


Remedial and Repeated Coursework

Advanced Opportunities may not be used for remedial or repeated courses or exams. Make sure that students are aware that any additional expense is the responsibility of the student.

Funding Requests Generated by School/District Users

To request Advanced Opportunities funding on *behalf* of a student, select **"Request"** then **"Request Course Funding"** or **"Request Exam Funding"** option under the **"Funding Requests"** tab.



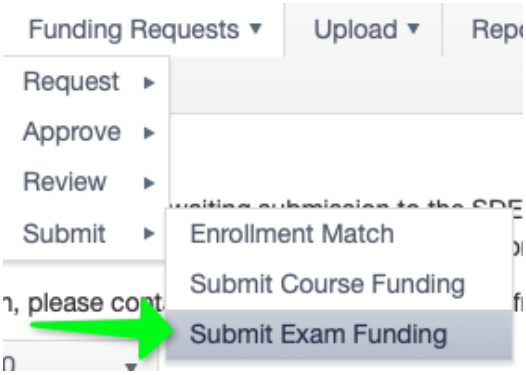
Fill out the pertinent information related to the course or exam. Records entered by the Advanced Opportunities Designee will not be subject to additional approval by the District. Please use the student's legal name. If the EDUID does not match the name uploaded to the office ISEE records, an error message will appear.

Reminder: Use the drop-down menu to populate courses. See **Course Assignments** for instructions on how to populate the drop-down menu. Using pre-populated course information increases speed and accuracy in entering courses. If a course is not available for a funding request from an Idaho institution, look to the Course Assignment tab to see if it is allowed. If a student takes a class from an accredited post-secondary institution from outside of common A.O. providers, the Advanced Opportunities Designee may enter the course using the "Other" option in the funding request. Be sure to use standard course title formatting (Course Code - Course Number - Course Name; ENGL 101 English Composition). Any entry that is not formatted in this way may be denied at the state level, resulting in a delayed or denied payment.

Look over course/exam information carefully. Make any necessary corrections; verify that the student's participation form is on file, then click "**Submit Exam/Course**." The district Advanced Opportunities Designee will receive a message confirming the approval.

Editing Process

For district Advanced Opportunities designees, courses and exams will appear in **"Funding Requests"** tab under **"Submit"** then **"Submit Course/Exam Funding."**



The user will see courses and exams that have been approved and charged to the student's account. These courses/exams can be edited as needed until the District Manager submits data to the SDE. If data must be edited after the student access window has closed, the Advanced Opportunities Designee must communicate with the course providers about any changes. *If the field needing correction is not editable in the system, you will need to deny the funding request completely and re-enter correctly as a new request.*

It is expected that the data submitted to the SDE is true and accurate. Please be diligent in double-checking to make sure all records are correct. If data must be corrected after the submission, please contact the SDE directly to make such corrections. This should only happen in extreme situations. It is expected that all data is corrected before submitting to the SDE.

Mass Upload Course Requests

For districts who have gone through in-person portal training, the upload feature will be enabled for the school district. To access it, click on the **"Upload"** tab and select "**Upload Course/Exam Funding Requests."**

Download the course/exam upload templates and column format mappings document. You will also need to reference the "All Courses" or "All Exams" document on the View Template Mapping page. These documents will have the necessary information to fill out the template for mass upload below. The following information is required:

- ***SchoolYear:***
  - Type in the end year of the applicable school year, for example for the 2020-2021 school year enter "2021"
- ***DistrictID:***
  - Type in the district's 3-digit identification number, such as "131"
- ***SchoolID:***
  - Each building has a school identification number, such as "52"
- ***Term:***
  - Enter Fall, Spring, Summer, Trimester 1, Trimester 2, or Trimester 3
- ***EduID:***
  - Type in the student's education identification number.
- ***GivenName:***
  - Type in the student's legal first name
- ***FamilyName:***
  - Type in the student's legal last name
- ***Grade:***
  - Enter the student's grade level
- ***ProviderID:***
  - Enter a number that indicated the Provider Identification number, choose from the following list.

ProviderID	Represents	***ProviderID***	Represents
0602	Boise State University	0614	North Idaho College
8845	Brigham Young University-Idaho	2895	Northwest Nazarene University
2897	BYU - Independent Study	8896	The College of Idaho
0615	College of Eastern Idaho	2898	Treasure Valley Community College
0607	College of Southern Idaho	0631	University of Idaho
0660	College of Western Idaho	9998	District
0608	Idaho State University	1082	Idaho Digital Learning Academy
1392	Independent Study in Idaho	9999	Other
0610	Lewis-Clark State College		

- ***AdvancedOpsCourseID:***
  - Enter the numerical course ID for the correct class from each institution. The course ID's can be found in the "**Column Format and Mappings**" link in the portal. Select "**All Courses**" and a list of courses will be available to you in an Excel spreadsheet. For example, for the class: "ACAD 100: Academic" from Boise State University, enter the code "1580." For "Other" courses, enter "1458"
- ***CreditNumber:***
  - Enter the number of credits, such as "3"
- ***CostPerCredit:***
  - Enter the cost per credit, such as "75"
- ***County:***
  - Enter the County Identification number, choose from the following table: CountyID

CountyID	Represents	***CountyID***	Represents
1	Ada	23	Gem
2	Adams	24	Gooding
3	Bannock	25	Idaho
4	Bear Lake	26	Jefferson
5	Benewah	27	Jerome
6	Bingham	28	Kootenai
7	Blaine	29	Latah
8	Boise	30	Lemhi
9	Bonner	31	Lewis
10	Bonneville	32	Lincoln
11	Boundary	33	Madison
12	Butte	34	Minidoka
13	Camas	35	Nez Perce
14	Canyon	36	Oneida
15	Caribou	37	Owyhee
16	Cassia	38	Payette
17	Clark	39	Power
18	Clearwater	40	Shoshone
19	Custer	41	Teton
20	Elmore	42	Twin Falls
21	Franklin	43	Valley
22	Fremont	44	Washington

- ***Request***:
    - Enter the amount of funds being requested for the course, such as ”225”
- ***ParticipationFiled***:
    - Enter whether or not the student has a participation form on file “Y” for Yes, and “N” for No
- ***OtherProvider***:
    - If you entered 1458 in AdvOpCourseID (column J), type in the name of the course provider. If you entered any other course code, leave this field blank
- **OtherCourse:**
    - If you entered 1458 in AdvOpCourseID (column J), type in the name of the course. If you entered any other course code, leave this field blank
- ***CourseType:***
    - Indicate the type of course you are entering: “Dual Credit”, “Overload”, or “Workforce Training”.
- ***InstitutionCourseID:***
    - For 2020-2021 school year all Idaho college will provide this information. Pleave view “All Courses” document for reference.
- ***CIP:***
    - This code is used for Workforce Training courses only.
- ***Notes***:
    - If there are any special circumstances regarding this course, enter notes here. If notes are not required, you may leave this field blank

When finished, save the file in **.CSV format**. This format preserves data for the upload to the system.

Return to the portal, and select “**Upload Course/Exam Funding**” and select “**Choose File**.” Locate the file on your computer and select “**Upload Course/Exam Funding Request**.”

Upload Exam Funding Request

Use the Exam Funding Request Template to mass upload multiple exams at the same time. The upload file should be in **.CSV format**. Use "Browse" button to locate the file on your computer and then click on "Upload Exam Funding Request" button.

- Exam Funding Request Template
- Column Format and Mappings

Choose File No file chosen

Upload Exam Funding Request

The system will populate a table called **"Upload Course Results."** The **Processed Records** shows the number of records reviewed by the system and the number of **Successful Records** shows whether or not the system has accepted the record. If there is an error the number of **Successful Records** will not match the **Total Records**. Each row that has an error will be identified in the table. Each error will need to be corrected and the file can be uploaded again.

Filename:	TestFile_01.csv
Uploaded By:	mtownes
Uploaded On:	6/11/2019 4:49:17 PM
Processed Records / Total Records:	4 / 4
Successful records / Total Records:	0 / 4

Drag a column header and drop it here to group by that column

Row Number	EduID Verified	Success	Error
2	true	false	Verify that the providerID is correct;
3	true	false	Verify that the providerID is correct;
4	true	false	Verify that the providerID is correct;
5	true	false	Verify that the providerID is correct;

Successful Records need to match **Total Records** in the upload. If this does not occur click on "**Upload History**", click "**Course Reimbursement Upload**" or "**Exam Reimbursement Upload"** link and view the error details. The table will provide the row number corresponding to the row in the upload file and the error that needs to be corrected. *If an error occurred and then is corrected the entire document data will need to be re uploaded and tried again as any upload document with an error does not upload any funding requests.*

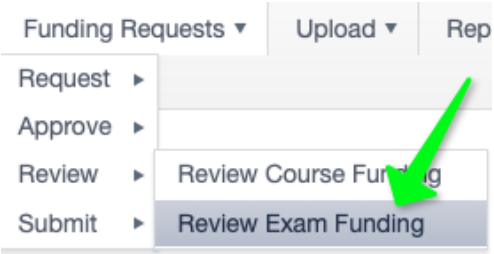
After the upload is complete, the courses will need to be approved. Click on "**Funding Requests**" and select "**Approve**" then "**Approve Course/Exam Funding."**

Use the check boxes to approve multiple courses at once.

Exam Type	Exam Name	School Year	Amount	Flagged	Details	Select
PTE	College Mathematics	2019-2020	$87.00		Details	
PTE	Test Exam	2019-2020	$100.00		Details	

Needs Review Status

Courses that need to be edited or reviewed are placed into a special status called "**Needs Review**" or "**Clarification Requested**." This can be done by any user who has access to the student data. To review courses in this status, click on **"Funding Requests"** and select "**Review"** then **"Review Course/Exam Funding."**



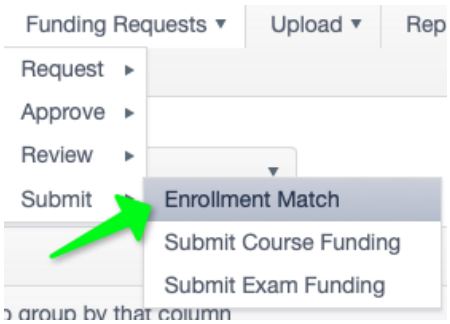
To view the details of the course, click on the **Course or Exam Name**. On the right-hand side, there will a progress table that indicates any changes and comments related to this request. Read the notes to diagnose the issue and make appropriate changes. Many fields in this view are editable. Corrections can be made, and the course can be approved again. If the field that requires correction is not editable, please deny the course and re-enter correctly.

Drag a column header and drop it here to group by that column

Note Text	Submitted By	Date
Reimbursement is in need of review.	skuchipudi	6/10/2019 12:05:26 PM
haritha testing	skuchipudi	6/10/2019 12:05:26 PM
Course submitted by [redacted]	[redacted]	5/15/2019 8:36:57 PM

Communicate with Course Providers

District Managers will need to verify that the course provider has confirmed that the student is taking the course before the "**Submit Courses to SDE**" button will turn red, indicating that the school district has a 100% match with the course providers. To quickly identify discrepancies, the District Manager can use **"Enrollment Match,"** found under **"Funding Requests"** and **"Submit."**



A report will be generated in which users can see where data is not yet at a 100% match with the course providers.

School Year	College	Term	Number of Course Funding Requests	Number of Matched Enrollments	Needing Review	Enrollment Match
2019-2020	Boise State University	Fall	5	0	0	0 %
2019-2020	Boise State University	Spring	2	0	0	0 %
2019-2020	Boise State University	Summer	3	0	0	0 %

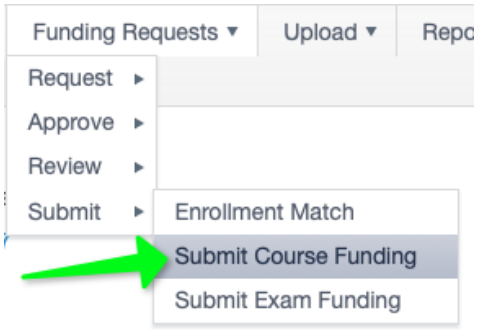
To identify specific student issues, the District Manager can download the CSV File from the **"Submit Course Funding"** report under **"Funding Requests"** and **"Submit."** The "Provider Enrollment" column in the spreadsheet will indicate whether or not the student's enrollment has been verified the by college ("true"=verified, "false"=not verified).

Contact the course provider to clear up any discrepancies. The submission link will not be live until 100% of the records have been verified by the provider. Provider contact information can be found on the A.O. website.

DISTRICT NAVIGATION: SUBMISSION TO THE STATE DEPARTMENT OF EDUCATION

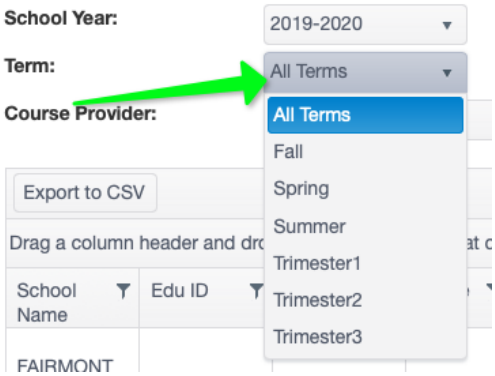
District Mangers

Once the data has been successfully entered into the Advanced Opportunities Portal and is ready to be submitted to the SDE for payment, District Managers will want to ensure that their data is processed correctly.

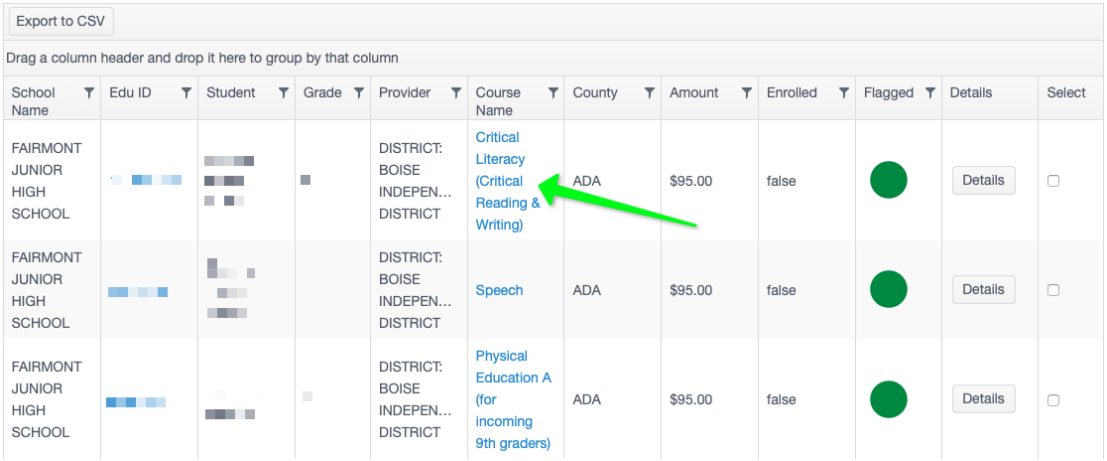


Review Data

All courses and exams that have been approved by Advanced Opportunities Designees will now appear in a final list to submit to the SDE. Courses and exams must be submitted separately. This feature is only available for the District Manager. Select the year and term to submit. *Note: Only one year can be submitted at a time.*



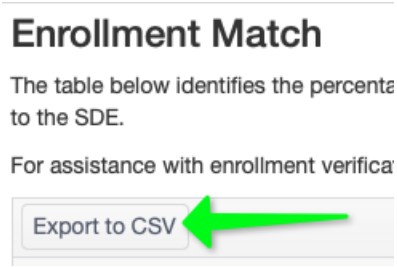
The district manager must double check records before submitting the final request. To review at the details of each submission, select the course name. By selecting “Export CSV” this may allow for a quicker review of the information.



District Managers can still make crucial edits to the courses by clicking on the course name. Please make sure to double-check the APPROVED AMOUNT and the COUNTY OF RESIDENCE.

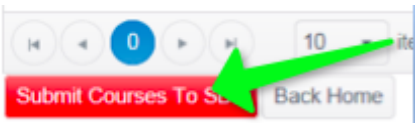
Export Data to CSV

This function will generate a report to an excel spreadsheet, please save a final report for district records. As soon as data is submitted to the SDE, it will no longer be editable by the district.



Submit Data to the Idaho State Department of Education

When 100% of the data has been matched by the providers, the button in the lower left-hand corner of the "Submit Courses Reimbursement" report will turn red. Click to submit to the SDE. Only one year at a time can be submitted, by selecting "All Years" you will not submit funding request, as this may reference courses/exams that are no longer allowable. For prior year courses/exams select the appropriate year.



Plan to submit this information earlier than the deadline. If submissions are late, the SDE will not be able to pay the post-secondary institutions in a timely manner. This may result in late fees for your students.

Submission

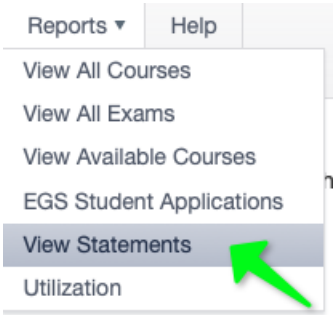
Submissions are due to the SDE on or before the following dates:

Term	District Submission Deadline
Summer 2020	Aug 14, 2020
Fall 2020	Nov 13, 2020
Spring 2021	May 5, 2021 (courses) May 21, 2021 (exams)
Trimester 1	Nov 13, 2020
Trimester 2/3	Feb 7, 2020
Trimester 3	May 1, 2020 (courses) May 22, 2020 (exams)

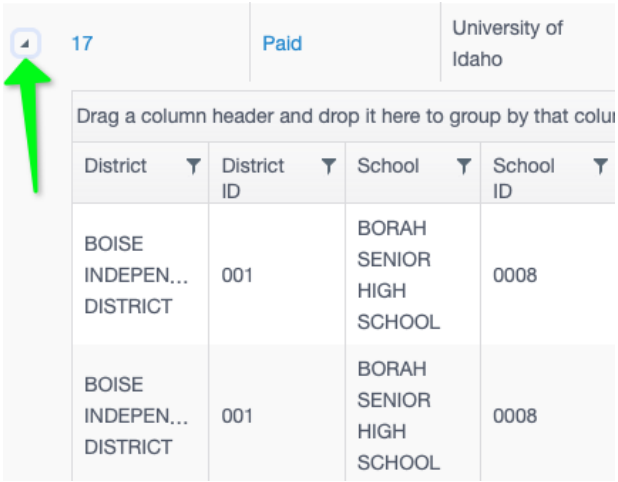
DISTRICT NAVIGATION: OTHER FEATURES

Billing Statements

After the SDE makes payment to the providers and districts a receipt will be placed in the **"View Statements"** section of the "**Reports**" tab. This will indicate completion of payment.



Billing statements are useful if a question about when a payment was made arises. To find specific details, follow the drop-down arrows:

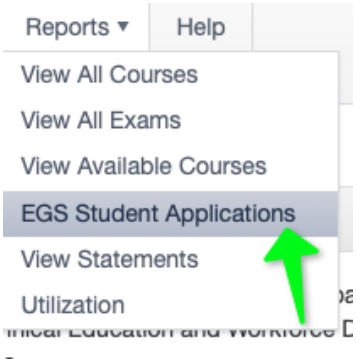


Early Graduation Scholarship

Students who graduate at least a full year early from an Idaho public school are eligible for an early graduation scholarship. These scholarships are equal to 35% of the Average Daily Attendance (ADA) for a given school year. This equates to roughly $1,800.00.

Scholarships can be used at Idaho public post-secondary institutions. The award amount will double for students who graduate two years early and will triple for students who graduate three years early. If a student elects not to attend an Idaho college or university immediately after high school, they will have up to two years to apply for the scholarship before it expires.

To apply for this scholarship, students must login through a student user account and request this scholarship. The student request will then show under **"Reports"** then **"EGS Student Applications."**



On this report, the district will be able to see which students have been coded in ISEE as an early graduate. *If a student is missing from this list please contact the district ISEE coordinator to review the exit code used for the student.* Students will have an exit code in ISEE of 4G (one year early), 4H (two years early), or 4I (three years early). This data will be matched with the student funding requests. If the data matches, the funds will be sent directly to the Idaho post-secondary institution at the beginning of the semester the student plans to enroll. If the "**Enrolled**" column is false this means the student is not enrolled or has yet to be verified by the college. The student should contact the college to have this verified.

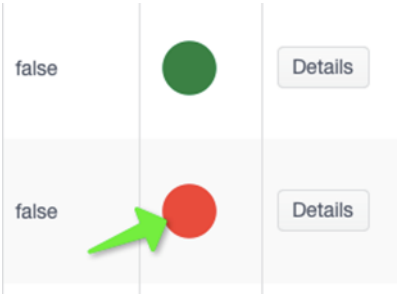
School Name	First Name	Last Name	EduID	Email	College	Term	Enrolled	Application status	Reimbursement Status	Grad Year	Details
CAPITAL SENIOR HIGH SCHOOL	[redacted]	[redacted]	[redacted]				false	No App Submitted; ISEE Records Exist	Pending SDE Approval	2017-2018	Details

Student Flags

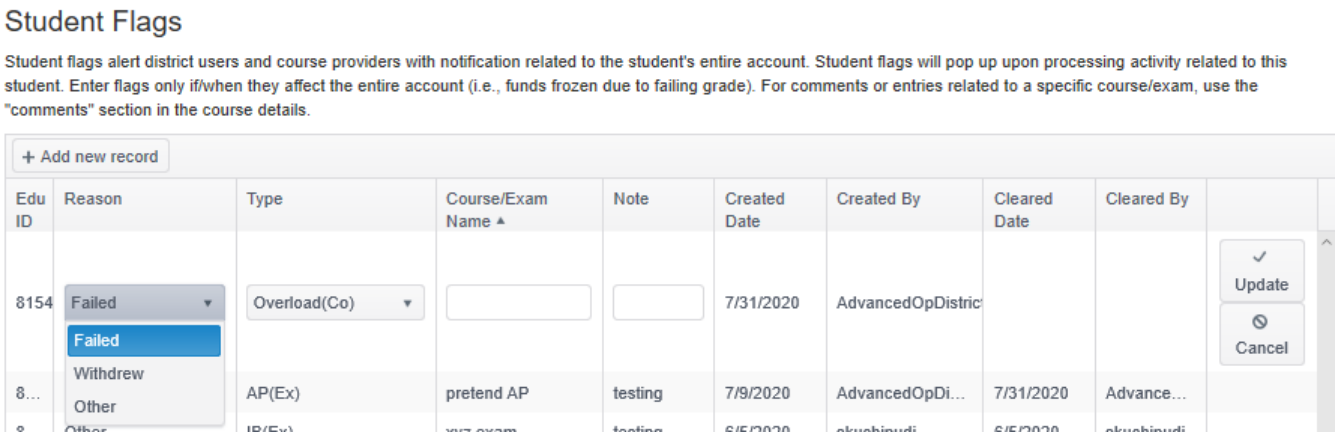
Student flags are a communication mechanism between the school, district, course provider, and SDE that ensures certain accounts receive extra monitoring. Once a flag is entered, the circle at the end of a student record will appear red. Flags may be entered by the district, the course provider, or the SDE. It is important to remember that students can also view the flags.

Unsuccessful Attempt Flag

When a student fails to earn credit for a class, 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 must pay for the next "like" course or exam (the same type—overload, dual credit, exam, or workforce training).



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; clicking on the blue EDUID link of the student who requires a flag. Clicking on the hyperlink will take the user to the individual student record.



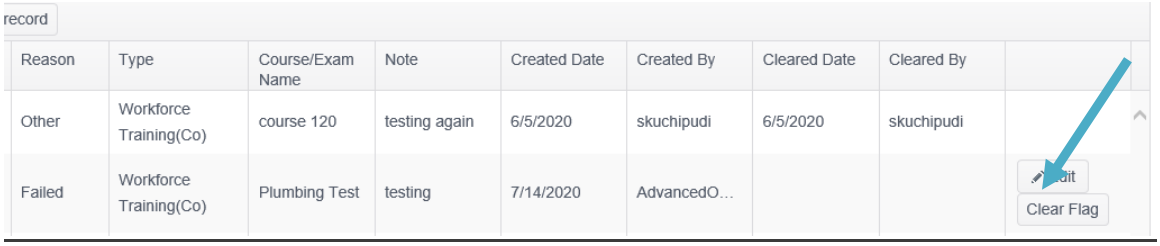
Once in the student profile, "**Student Flags**" will appear at the top of the record. To add a flag, click on "**Add a new record**." Enter specific details, as a student may have more than one flag in place at a time. Select the following: reason, type, course name failed, and notes.

- 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 2020"

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

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 like course). It will remain as part of the student's record.

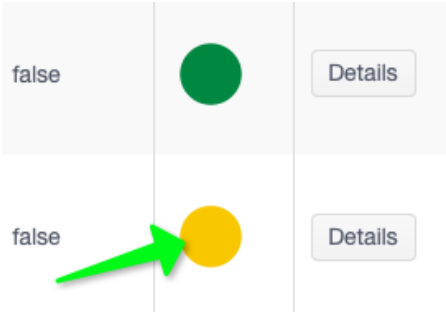


record

Reason	Type	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 Training(Co)	Plumbing Test	testing	7/14/2020	AdvancedO...			Edit Clear Flag

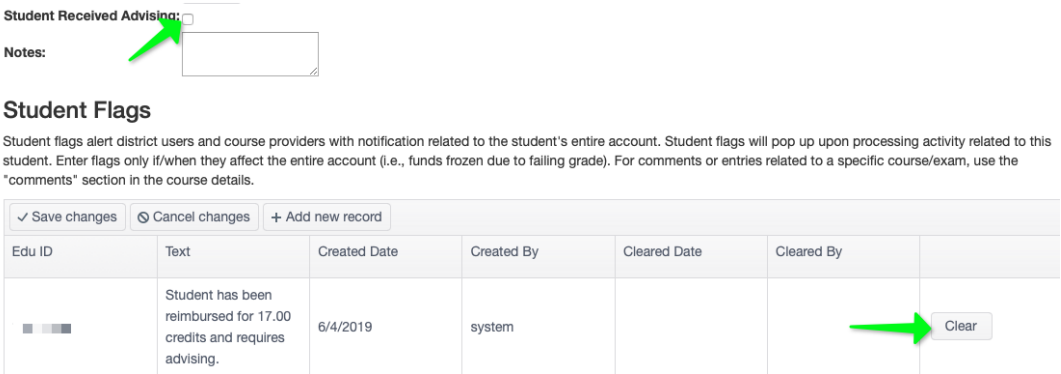
Advising Flag

Students who have accessed Advanced Opportunities funds for 15 or more credits must receive postsecondary advising informing them how their courses will translate into a degree, certificate or following their student plan. Students requiring advising will have a yellow circle in their funding request record. District Managers cannot submit data for SDE processing with yellow flags present.



To locate students who need advising click "**Reports**" and "**View All Courses**". Students can be filtered by typing "**Y**" into the filter for "yellow" on the flagged column. To view all students needing advising select "All Years" for the school year.

When the student has received advising, the yellow circle can be removed by going into the student's profile and checking the box labeled **"Student Received Advising"** or by clearing the advising flag.

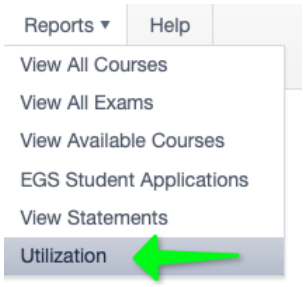


Warning Flag

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 post 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.

Utilization Report

School personnel may view a program utilization report; each user has the same level of transparency as fits their user role. District Users may see district wide information and school level users may see school level data. This report may be accessed under **"Reports"**; once there, select **"Utilization."**



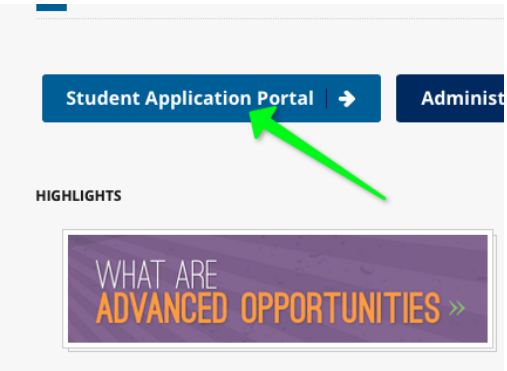
This report will show an aggregate breakdown of students, credits, exams and total dollars paid by each school in the district.

Overload Courses	Dual Credit Courses	Workforce Training Courses	Dual Credit Credits	Exams	Dollars Paid	Student Count
73	3	0	9.00	42	$10,795.00	78
89	0	0	0.00	28	$10,651.00	69
10	64	0	192.00	14	$14,282.00	43

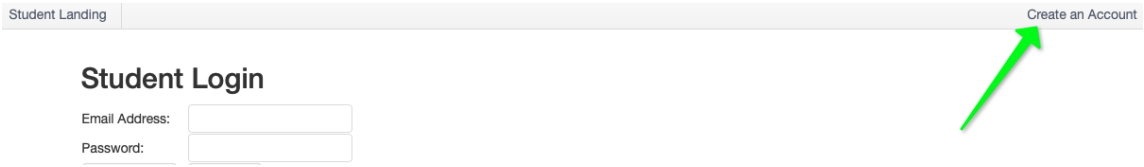
STUDENT NAVIGATION

Creating a Student Account

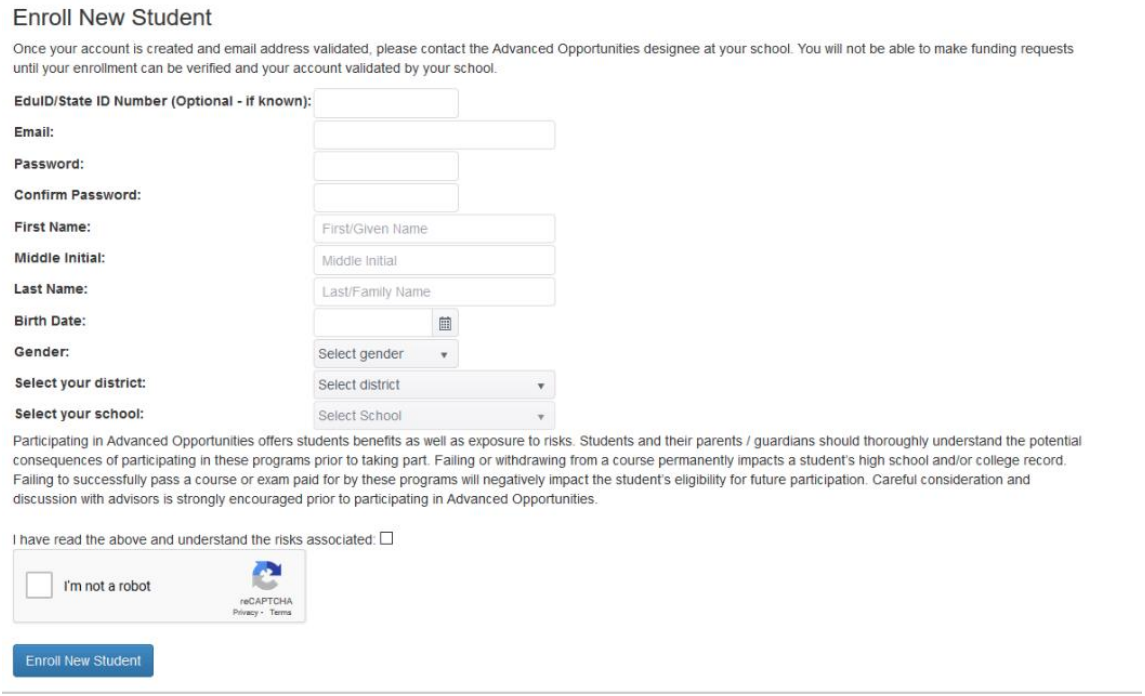
From the Advanced Opportunities site (http://www.sde.idaho.gov/student-engagement/advanced-ops) the student will select the blue "**Student Application Portal**" link.



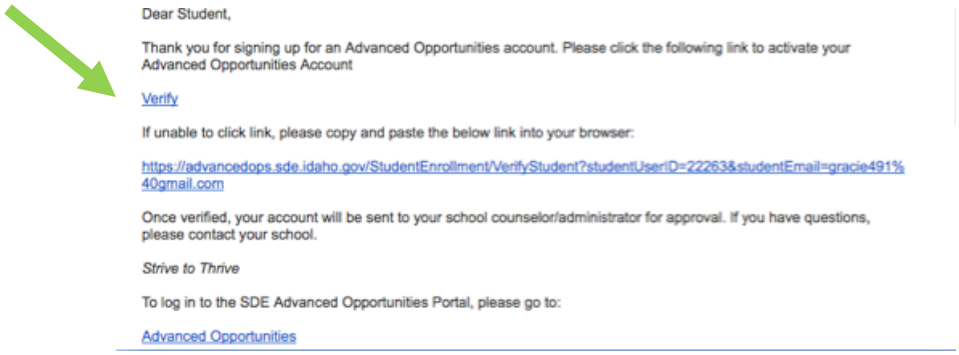
The student will click "**Create an Account**" in the top right-hand corner.



The student will register for an account using a valid email address.

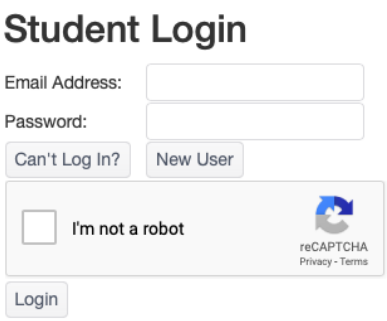


An email will be sent to the student to verify the account. The student will need to select the 'verify' link to proceed. This email is sent instantly; if the student does not get it within minutes of applying, the student should check the email spam folder or confirm a valid email address was used.



Upon verification by the student, a district Advanced Opportunities Designee will approve the account. This step may take a bit of time, as it is done manually by the school district. Once approved, the student will be able to apply for funding for courses/exams.

After district Advanced Opportunities Designee has approved the account, the student can log into the portal with the username and password that the student set up.



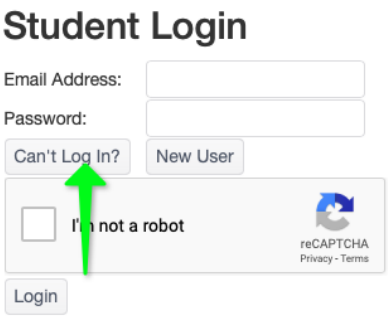
The student can now apply for funding for courses and/or exams.

Incorrect Account Information

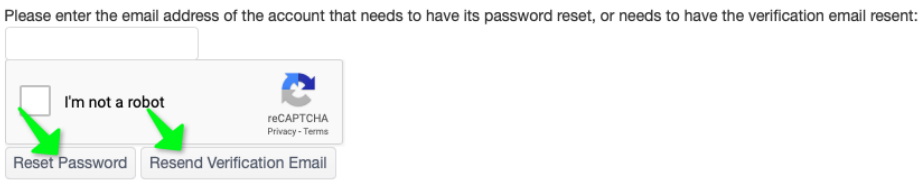
If a student created an account but selected the wrong school, or entered any of their information inaccurately, the student may log into the account and correct this information in the profile.

Missing Verification Email / Reset Password

If the student is missing the verification email or needs to reset the password, the student should login to the website and select the "**Can't Log In?**" link.



The student may then choose to have the verification email resent or to reset the password.



If a student receives the following error message, it is possible that when creating theaccount an error was made (e.g. wrong email address).

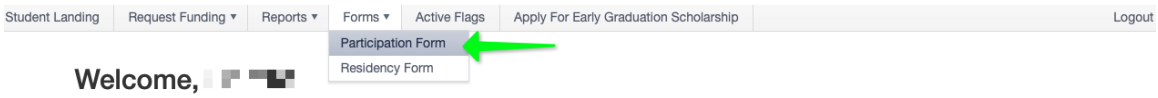
"Resending the verification email failed. Please make sure the email address is correct, and belongs to an existing account. Note that already-verified accounts cannot be re-verified."

In this case, a student should re-create the account with the correct email address.

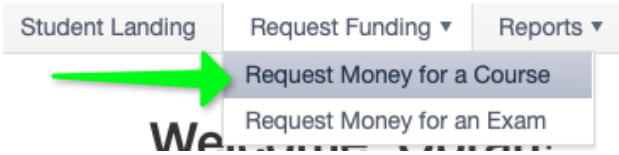
Student Generated Funding Request

Once the student has logged into the account, a funding request can be made.

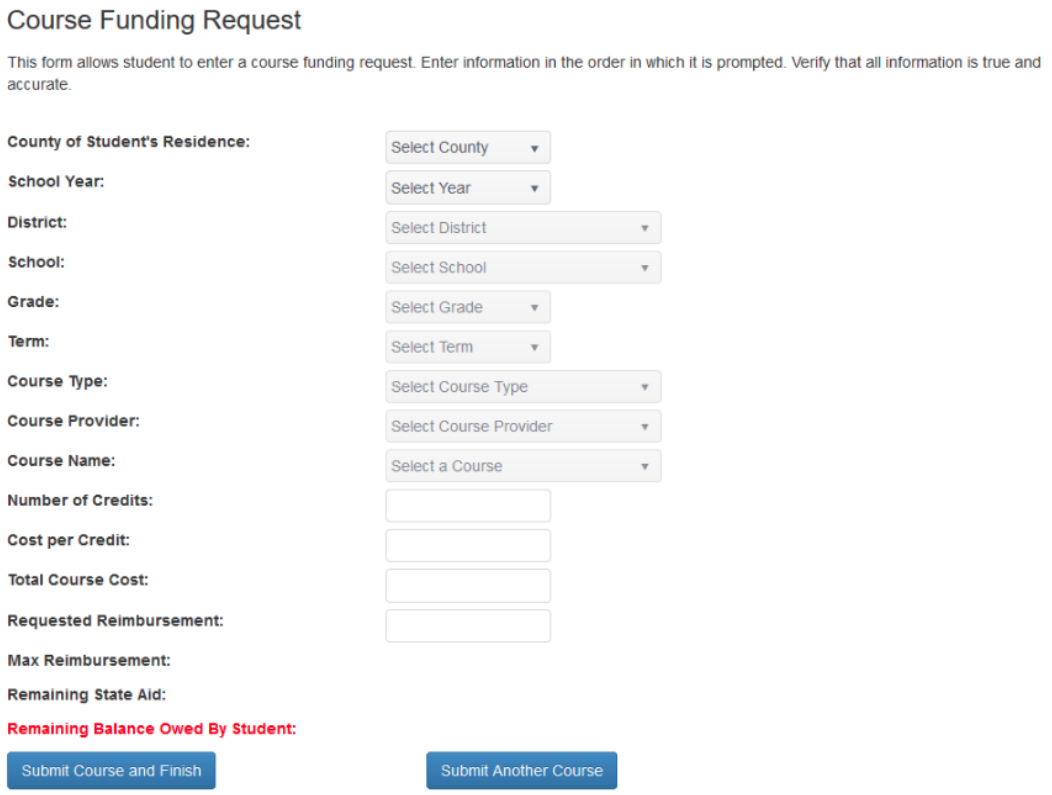
The student needs to be sure that a **Participation Form** is on file with the Advanced Opportunities designee. The district must have this on file in order to approve the student for any Advanced Opportunities funding. The form can be found under the "Forms" tab in the student portal.



Once the form is on file, the student is ready to request funding. Select **"Request Funding"** and then choose the application type.



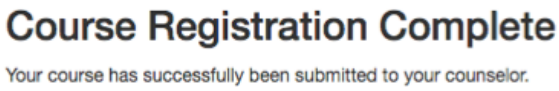
The student will enter the course/exam information, using the pre-populated drop-down course or exam menu.



If the desired course or exam is not available, the student should contact the district Advanced Opportunities Designee to ensure that that course or exam is eligible. A class may need to be added to the drop-down menu through the **"Course Assignments**" feature.

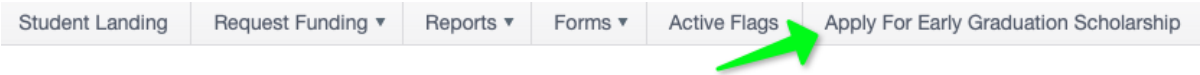
*If the student is taking a course from an out-of-state provider or is taking an atypical class, the request will need to be entered by the Advanced Opportunities Designee as an **"other"** option.*

Once the request has been submitted, the student will receive a notice indicating that a request for Advanced Opportunities to pay for a course or exam has been completed.

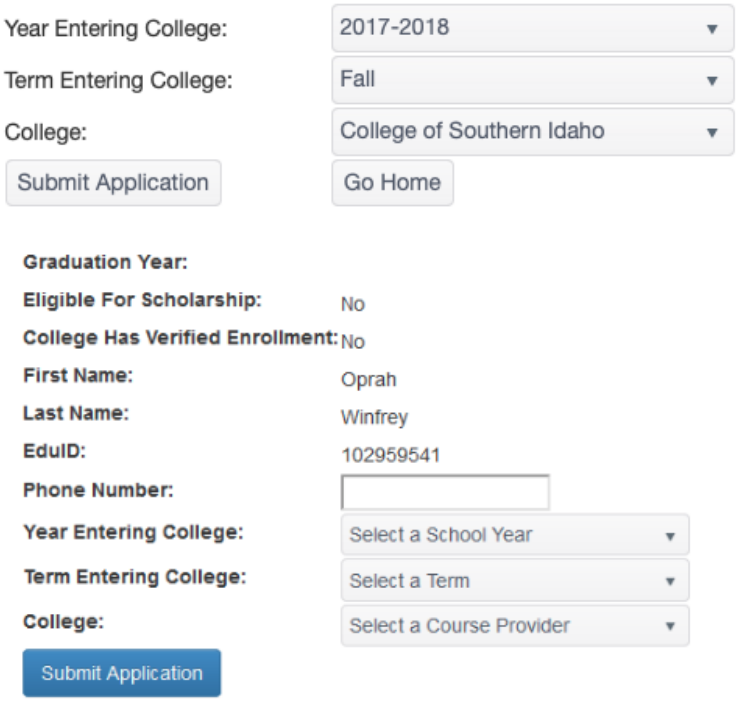


Early Graduation Scholarship Application

Students who graduate at least a full year early are eligible for an Early Graduation Scholarship. To apply for this scholarship, students must login to their Advanced Opportunities account. In the bar at the top of the webpage, the student will select **"Apply for Early Graduation Scholarship."**



Once the student has opened this form, the student information will auto-populate. The student will need to complete the remaining information needed. The student will submit the application. This request will be visible by the student's district, which will need to be entered and submitted to the SDE via ISEE.



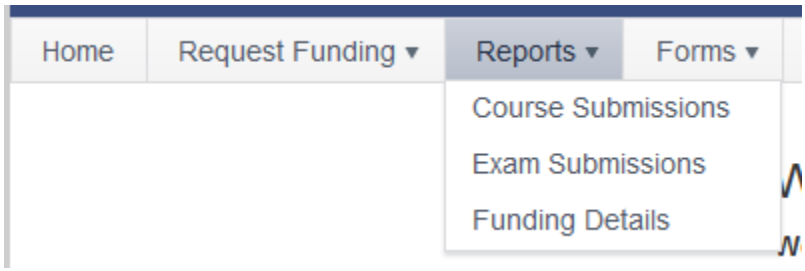
The student may track the scholarship progress via their Advanced Opportunities account. Students are encouraged to communicate with their Advanced Opportunities Designeeto confirm eligibility for this scholarship.

Email Notifications

Students will receive email notifications whenever the status of the submission changes. This includes denial, approval, and payment status.

Student Account Management

The student will be able to manage their account in the portal. Reports of prior course submissions and programs totals may be found under the **"Reports"** tab in the student login.



If a student wants to see prior requests for courses or exams click on the **"Course Submissions"** or **"Exam Submissions"** reports. This will show the student's applications and current status (pending, approved/denied, or paid).

Student Exam Submissions

To view the details of a flag, either click on the flag or click the "View Flags" tab. Below are flag descriptions:

- **Green:** Student is able to make funding requests.
- **Purple:** This is a warning that the student's Advanced Opportunities balance is at or below $500.
- **Yellow:** The student has earned at least 15 credits and requires advising before future funding is allowed.
- **Red:** The student has failed to earn credit for an exam or course and future funding is prohibited until student is in compliance with program rules.

Drag a column header and drop it here to group by that column

School Year	Program	Exam Name	Submitted Date	Status	Requested Reimbursement	Approved Reimbursement	Flagged
2016-2017	Fast Forward	Art History Exam	3/2/2017	Denied	93	0	
2016-2017	Fast Forward	Art History Exam	2/27/2017	Denied	93	0	
2016-2017	Fast Forward	Art History Exam	2/27/2017	Denied	93	0	
2016-2017	Fast Forward	Art History Exam	2/27/2017	Denied	93	0	
2020-2021	Fast Forward	Calculus AB Exam	6/27/2020	Pending Initial Approval	94	94	

Students may view their overall use of the program under "Program Totals." Students and parents may want to use this tab to monitor their overall program balance.

Funding Details

Drag a column header and drop it here to group by that column

Advanced Opp Name	School Year	Term Name	Credits Approved	Exams Approved	Dollars Approved	Dollars Available
Fast Forward	2016-2017	Year	2	1	$321	$3804
Fast Forward	2017-2018	Year	2	1	$321	$3804
Fast Forward	2018-2019	Year	2	1	$321	$3804
Fast Forward	2020-2021	Year	2	1	$321	$3804

Students may also monitor their flag status through their account. Student accounts may have a red flag added when they fail to earn credit for a course or exam. In order to access future funding, the student must pay for a "like" course or exam.. A purple flag will be added when student has$500 or less of money left in account.

Student flags details can be accessed in two places, click on "**View Flags**".

To view the details of a flag, either click on the flag or click the "View Flags" tab. Below are flag descriptions:

- **Green:** Student is able to make funding requests.
- **Purple:** This is a warning that the student's Advanced Opportunities balance is at or below $500.
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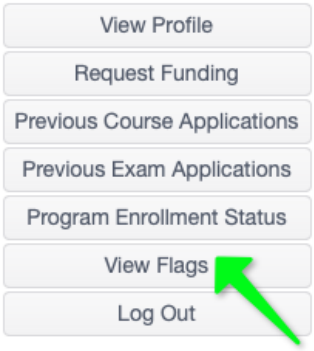

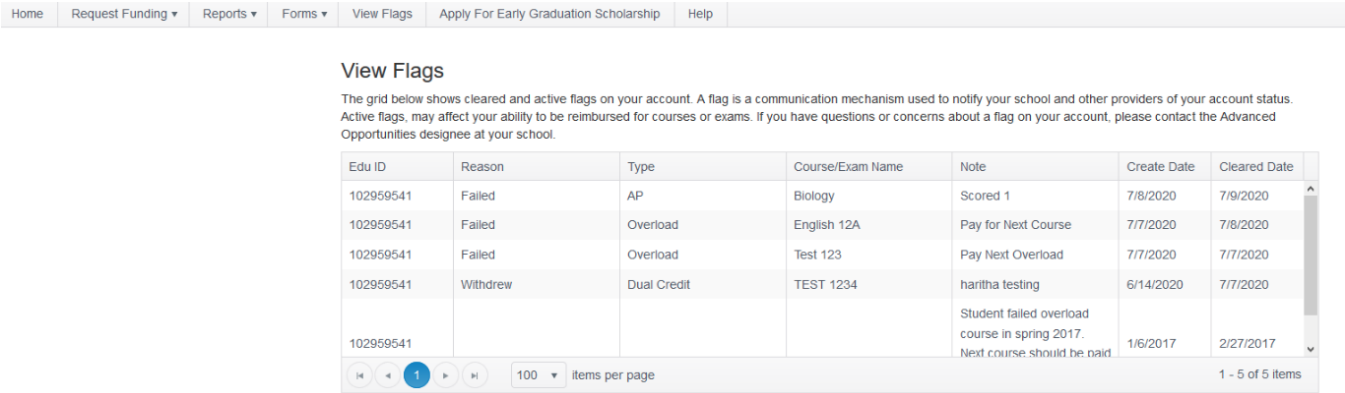

HELP

The Help feature in the A.O. portal provides a means to communicate information with the Idaho State Department of Education in a secure manner through the Online Tool for IT support (OTIS). Please do not send any personally identifiable information (PII) via email, the SDE will be unable to respond. From the help page follow the on-screen directions:

1. Click: “Go to OTIS”.
2. Submit a ticket by selecting “Create A Ticket”.
3. Select “Web App (apps.idaho.sde.gov)” as the primary ticket type.
4. Select the Issue (most common are Data Fix or Use Inquiry).
5. Select “Advanced Opportunities in the category.

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

Thank you for your dedication to Idaho students!

The State Department of Education appreciates all the efforts put in by school district personnel to ensure that Idaho students are able to benefit from the Advanced Opportunities program. 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.