ADVANCED OPPORTUNITIES WEB-BASED PORTAL 5.0

Workforce Training User Guide

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:
www.sde.idaho.gov/student-engagement/advanced-ops/

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 to use in grades 7-12 for certain courses and exams, in which a student may incur a cost.

- **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 (PTE/CTE) exams. A full list of qualifying exams and their maximum reimbursements is available 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.

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. This has been determined to include workforce training programs. The school district will receive the same amount as the early graduate's scholarship, regardless of whether or not 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. Workforce training staff will have to communicate with the primary Early Graduation Scholarship Manager at the college to have an enrollment verified for the scholarship in the Advanced Opportunities portal. Workforce training staff do not have the ability to verify eligibility of the Early Graduate Scholarship. It is likely that if a scholarship is paid to the college it will be received by the Scholarship office at the institution and will need to be routed to the appropriate office/student.

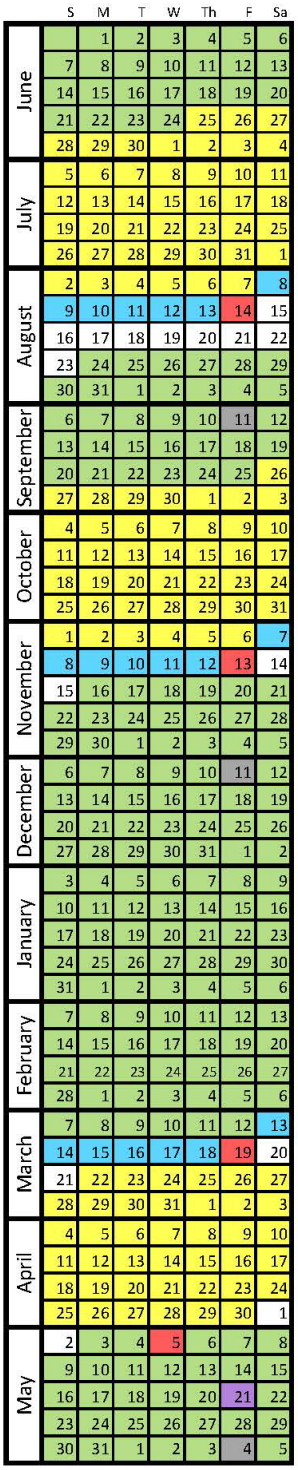
Funding Information

If a student is taking a workforce training course from an Idaho public technical college (NIC LCSC, CWI, CSI, ISU, CEI), 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 these institutions directly. Depending on the college organizational structure, payment may need to be routed to the workforce training center once received to the college.

End of Fiscal Year

It is critical that all deadlines are met. Idaho Statute 33-4602 requires that all requests are 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.

Timeline



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

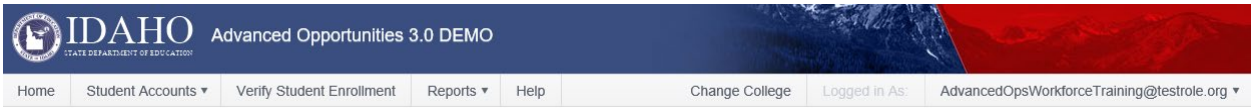
Advanced Opportunities Portal Timeline 2020-2021

- Student funding request opportunity/Data entry window
- Verification window for colleges/universities and other course providers-correction of errors per communication between school districts and course providers
- Final review period, no new submissions
- Submission of funding request to SDE
- SDE approves Data/Payments are made to course providers, school districts, and counties
- Spring Exam submission deadline

PORTAL ACCESS

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, please contact the Advanced Opportunities Support Team to have the correct user permissions assigned to the account for Advanced Opportunities.

Upon entering the portal, the following options will appear as the header to your account.



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

WORKFORCE TRAINING STAFF ROLE

The primary role of workforce training staff as it relates to Advanced Opportunities, is to ensure an accurate catalog of course offerings, verifying enrollment of students, and reviewing statements and payments.

COURSE OFFERINGS

It is up to the course provider to maintain a current list of approved workforce training courses to ensure that school districts can make them available to school staff and students. Updating course offerings can be conducted by filling out the details on the Advanced Opportunities website under the “Administrative User Information” tab. Workforce training staff do not have the ability to upload their own courses.

To request a new course offering through Advanced Opportunities, click on “Workforce Training Course Submission” on the Advanced Opportunities website under the Administrative User Tab. The form will need to be filled out for each course request. Once a course is submitted it will be reviewed for approval in meeting Idaho Statute § 33-4602.

For students to be able to access funding for new workforce training courses please submit by the following deadlines:

- For August to September student availability submit new course request by **July 1st.**
- For November to March student availability submit new course request by **October 1st** .
- For May to June student availability submit new course request by **April 1st.**

In order to ensure workforce training courses are meeting the needs of students and are available for funding requests through the Advanced Opportunities (AO) program the following steps are required.

Step 1. Provide course details.
Step 2. Include any supporting documents for the course (i.e. cost justification or letter of support).
Step 3. Provide a signed approval from the Academic Officer of your institution for courses to be considered.

Upon review of the information, the Idaho State Department of Education, in collaboration with Idaho Career Technical Education and Workforce Development, additional information may be requested. Courses will be reviewed for AO approval three times a year. Requests for Advanced Opportunities must be submitted by the deadlines in order to have a timely review.

For courses the following information is required: course name, course ID, CIP code, SOC code, delivery method, course availability, costs, and in-demand details.

For consistent naming conventions, the SDE 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: **Electrical Apprenticeship 1A**

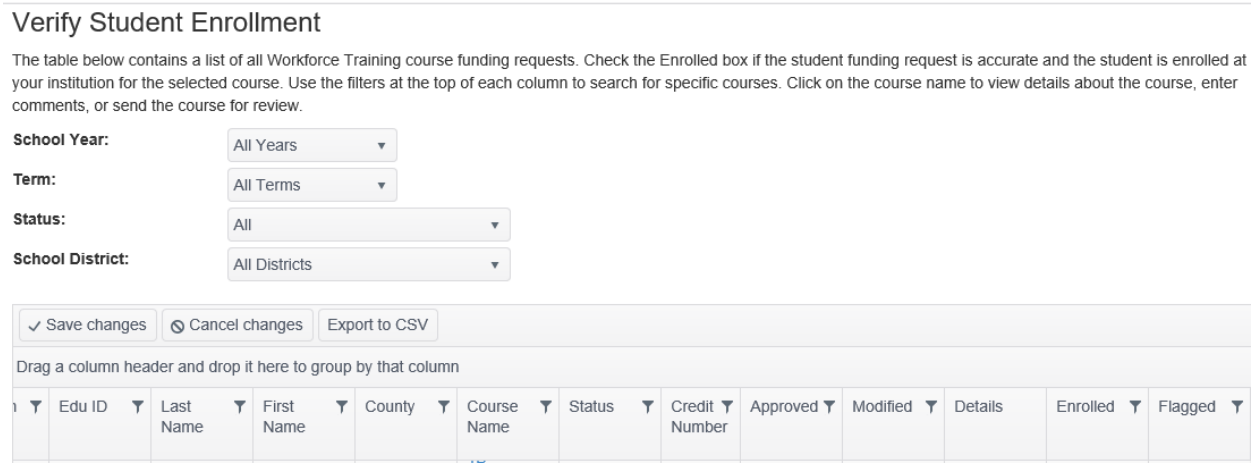
Additionally, the course providers must indicate the terms during which the courses will be made available to students, which may not exactly correspond to workforce training schedules.

If a course becomes no longer available please contact one of the Advanced Opportunities support team to have the course removed from student access.

VERIFY STUDENT ENROLLMENT

A list of all courses for which a funding request has been entered will be viewable on the “Verify Student Enrollment” screen. As each course moves through the verification process in the portal, the course status will change. This view may be filtered by school year, term, course status, and school district.

As courses are added to the queue, course providers will verify whether or not students are enrolled in the course. The column titled “Enrolled” to the right has a check box available to verify enrollments. If a student is enrolled in the course, please verify their enrollment by checking the box. If student is not enrolled in the course, leave the box blank indication the student is not enrolled. Click “save changes” before moving to the next screen. You may need to scroll the table to the right to view the Enrolled column.



When looking at this information, it is important that course details are carefully reviewed to ensure accurate payment.

Funding Request Status

Courses, which are entered by students and district personnel, will go through the following status sequence:

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 SDE
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.

Schools are not able to submit their funding requests to the state until they have reached a 100% match, meaning 100% of the courses funding requests are matched 100% with those that have been checked as enrolled. It is critical for college and workforce training Users to work

with schools to identify and correct any discrepancies in data. Certain situations may require additional communication and proactive communication. Course funding requests in which a student is not enrolled in the workforce training course or a student that is enrolled, but has not requested A.O. funding may need additional communication to ensure accurate data is not missed.

To filter students by enrollment status, click on filter symbol next to Enrolled and select either "is true" (i.e. enrollment is checked) or "is false" (i.e. enrollment box has not been checked). Any course funding requests that a student is not enrolled should eventually be moved to the status "Clarification Requested", for further review and the possible denial of the request from the district.

Clarification Requested

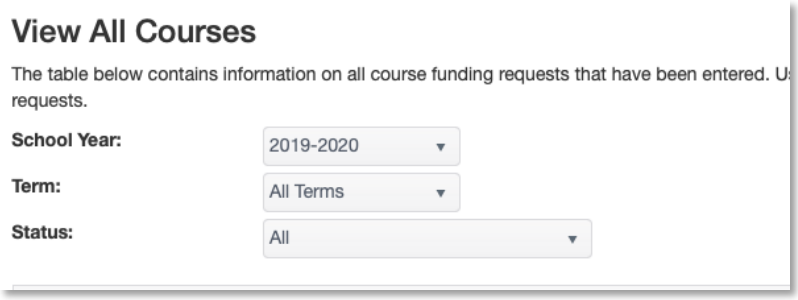
Course Providers can move courses into a "Clarification Requested" status. To do this, click on the title of the course, enter the reason in the Notes box, and select "Send for Review." This will push the funding request into a separate report for district personnel to resolve and re-approve. You will likely want to communicate with the district in which you are sending courses for clarification so that that the district will know to review.

REPORTS

Under Reports, the User will find options for View Courses and View Statements.

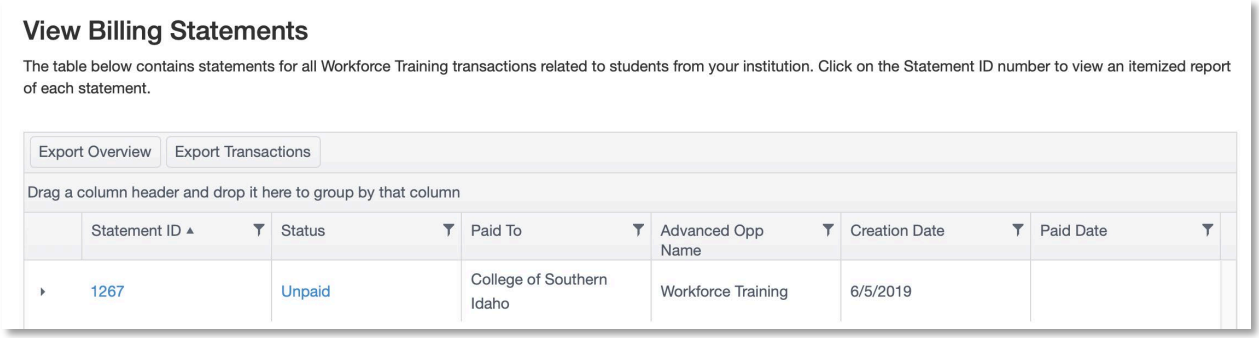
View Courses

Under "View All Courses", the User can see all funding requests related to their schools workforce training courses and may sort by school year, term, and course status.



View Statements

Under View Statements, the User can see all Advanced Opportunities billing statements and their detailed information.



View Billing Statements

The table below contains statements for all Workforce Training transactions related to students from your institution. Click on the Statement ID number to view an itemized report of each statement.

Export Overview | Export Transactions

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

Statement ID	Status	Paid To	Advanced Opp Name	Creation Date	Paid Date
1267	Unpaid	College of Southern Idaho	Workforce Training	6/5/2019	

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 up a Billing Details screen, which will identify the statement number, Advanced Opportunity program name, provider, billing item type, student name, course/exam name, and billing item amount. The viewer can export the information using the "Export to CSV" button, this will provide an excel document that will show further billing details, such as school the student attends, the students EDU ID, and term.

DEADLINES

Deadlines for student application data entry and data submission in the portal are set by the SDE for all school districts. Districts with special circumstances may be able to adjust deadlines to meet local needs, but this only must be done after consultation with providers and with final approval from the SDE. Only the SDE can adjust these windows in the portal.

With input from course providers, the following deadlines by the SDE for the 2020-2021 school year. This chart is also available on the Home tab in the Advanced Opportunities portal.

Advanced Opportunities Portal Dates

	Student Access Window	Verification Window	Submission Deadline
Spring 2020	Jan 06 - Feb 21	Feb 24 - May 08	**May 15, 2020 (Courses)** **May 22, 2020 (Exams)**
Summer 2020	May 04 - Jun 26	Jun 29 - Aug 07	**Aug 14, 2020 (Courses)**
Fall 2020	Aug 24 - Sep 25	Sep 28 - Nov 06	**Nov 13, 2020 (Courses)**
Spring 2021	Nov 16 - Mar 19	Mar 22 - Apr 30	**May 5, 2021 (Courses)** **May 21, 2021 (Exams)**
Trimester 1	Aug 24 - Sep 25	Sep 28 - Nov 06	**Nov 13, 2020 (Courses)**
Trimester 2/3	Nov 16 - Mar 19	Mar 22 - Apr 30	**May 5, 2021 (Courses)** **May 21, 2021 (Exams)**

If course funding requests are entered into the portal past the recommended deadline, it is up to the course provider to determine whether or not to accept such registrations. The SDE recommends that any entries made after these deadlines be done with the consent of both the school district and the course provider.

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

Upon the districts' submissions to the SDE, 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 SDE to correct these errors.

The SDE will process all submitted data and may reach out to districts or course providers at this time if any red flags arise. Upon SDE approval, payments will be made to course providers and school districts.

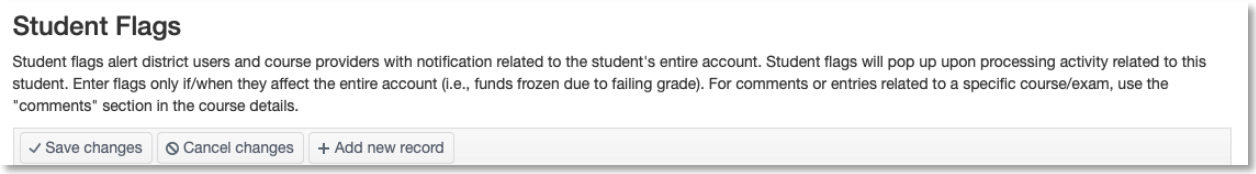
STUDENT FLAGS

Green flags indicate a normal status of a student's A.O. account. When a student fails to complete a class due to withdrawal, failing grade, or non-completion, the course provider must enter a flag onto the student account. This allows all portal users to know that the student must then pay for the next "like" class or exam (the next item must be of the same or greater cost *and* the same type—overload, dual credit tuition, exam, workforce training). It is important to note that failed courses/exams only impact continued funding for "like" courses; for example, a failed workforce training course will only impact funding for workforce training courses in the future.

Unsuccessful Attempt Flag

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.

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)

Select “Update” to add the flag.

When entering a flag, the User should provide the following information for the course/exam for which the student did not earn credit:

Example: “Failed, Workforce Training, Nursing Assistant, $500 used in FA 2020”

To clear a flag, a user 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 access A.O. 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 not be eligible to receive any additional funding until the student has been advise. 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 also has an unsuccessful attempt flag on their account.

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.

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:

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.

Portal HELP Page:

OTIS:

OTIS is a secure incident tracking application that can be used to deliver data. Personal Identifiable Information (PII) like students, teachers, users or any individual's identified or identifiable information should be communicated through OTIS only. Users can create tickets, add notes or attachments to their existing tickets and view or search any tickets created by them using OTIS.
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".

Go to OTIS

OTIS User Guide

Thank you for your dedication to Idaho students!

The State 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.