Course Provider User Manual

PROGRAM SUPPORT

Brock Astle
Statewide Coordinator of Advanced Opportunities
bastle@sde.idaho.gov
(208) 332-6944

Helen Savage
Regional Contractor, North Idaho
hsavage@sde.idaho.gov
(208) 305-0372

Rebecca Mattucci
Regional Contractor, South Idaho
(208) 991-3287
rmattucci@sde.idaho.gov

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.

Table of Contents

PROGRAM OVERVIEW

Advanced Opportunities

The Advanced Opportunities program provides every student attending an Idaho public school in grades 7-12 an allocation of $4,125 for certain courses and exams, in which a student may incur a cost. These include:

- **Overload Courses**: An overload course is a high school level course that is taken in excess of a full course load and outside of the student's regular school day. These courses can be offered online, during the summer, and/or before or ~~f~~after school. If a student incurs a cost for such courses, the Advanced Opportunities program can pay up to $225.00 for the cost of the course.
- **Dual Credit Tuition:** Students earn dual credit by taking courses that are recorded on both a high school and a college transcript. The Advanced Opportunities program can pay up to $75.00 per credit. Dual Credit courses can be taken in a student's high school, online, by virtual conferencing, or in some cases directly on the college/university campus. More information on specific Idaho colleges and universities can be found in the Links Tab on the Advanced Opportunities website.
- **Exams:** A student can utilize funds to pay for a variety of exams and proctoring fees. Exams include Advanced Placement (AP), International Baccalaureate (IB), College Level Examination Program (CLEP), college entrance exams, and Career & Technical Education (CTE) exams. A full list of qualifying exams and the maximum reimbursement possible is available in the Resource Files on the State Advanced Opportunities website.
- **Workforce Training Courses:** Students may use up to $500.00 per course ($1,000.00/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

A student may achieve credit for coursework by demonstrating mastery of a subject's content standard, each school district will have policies on how a student can demonstrate mastery and is required to have criteria on how students can challenge courses. it. If the student meets the

level of mastery set by the local school board for a given set of standards, the school can grant the student high school credit without requiring that the student take the course.

Early Graduation Scholarship

Early Graduation Scholarships are available for students who graduate at least one full year early from an Idaho public high school. These scholarships are equal to 35% of the Average Daily Attendance (ADA) for secondary school students in a given school year. This equates to roughly $2,000.

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

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

Funding Information

If a student is taking a course from an Idaho public college 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 from Advanced Opportunities at the end of each term. The state will pay these institutions directly. Depending on the college organizational structure, payment may need to be rerouted.

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.

Process Flow

- Students register for courses.
- Funding request is made in the Advanced Opportunities portal by student/district.
- School approves request.
- Course provider verifies the enrollment of the course.
- School district submits request to the SDE (State Department of Education) for payment.
- The Idaho State Department of Education reviews/approves requests.
- Payment is sent to the provider.
- Upon conclusion of the course, if any students were unsuccessful, the provider or school district will add a flag to students' account.

PORTAL ACCESS

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

1. First create an account by registering an email. https://auth.sde.idaho.gov/Other/Registration/Register (If your organization does not appear when creating an account, type and select District/Organization Not Listed).
2. Have user permissions assigned to the account.
    a. After creating an account, please contact the Advanced Opportunities Support Team to have the correct user permissions assigned to the account for Advanced Opportunities. College staff working only in workforce training will be provided the workforce training user role. Other roles may include college user role (for dual credit) or scholarship role (for early graduation scholarship).
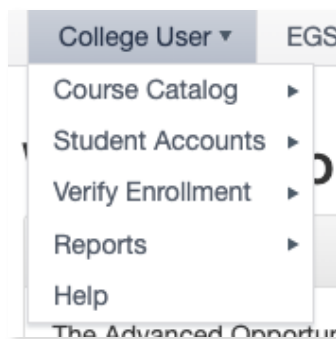
Upon entering the portal, the following options will appear across the top:
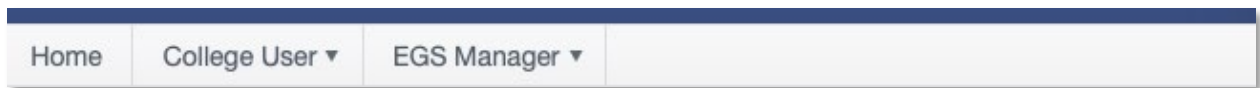
If these options are not visible, please contact the Help Desk to ensure that the correct role has been assigned.

College User

The College User has the following menus:

COURSE CATALOG

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

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

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

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

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

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

Example: **POLS 101 Political Science**

Additionally, the course providers must indicate the terms during which the courses will be made available to students. "Allow" indicates that courses are open for enrollment. "Disallow" indicates that courses are closed for enrollment. Please note that the summer is the start of the next school year in the Advanced Opportunities portal. For example, Summer 2023 belongs to

the 2023-2024 school year. To allow a course, the User will simply click on the word "Disallow" and select "Allow" from the drop-down menu, then save changes before moving on to another screen.

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

Catalog Upload

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

To upload a catalog, the User will:

1. Go to College User / **Course Catalog / Upload Course Catalog.**
2. Download the "Course Catalog Templates" file. Find in-depth information for completing the template via the "Template Upload Directions and "**All Courses"** documents found in the upload section of the portal.
3. Fill out the template as follows:
    *   *School Year:* Type in the end year of the applicable school year, for example enter "2023" for the 2022-2023 school year *Course Name:* Type in the name of the course. Use proper naming conventions such as "ENGL 101 English Composition"
    *   *Credit Number:* Enter the number of credits such as "3"
    *   *Credit Cost:* Enter the cost per credit, such as "75"
    *   *Available Summer:* Identify if the course is offered during the summer term. Enter "Y" for Yes and "N" for No
    *   *Available Fall:* Identify if the course is offered during the fall term. Enter "Y" for Yes and "N" for No
    *   *Available Spring:* Identify if the course is offered during the spring term. Enter "Y" for Yes and "N" for No
    *   *Course type:* Enter Overload Course, Dual Credit, or Workforce Training to identify the type of course being uploaded
    *   *Institution CourseID:* Enter the institutions unique course ID
    *   *CipCode:* Enter the Classification of Instructional Programs code for the associated course (not needed for dual credit)

4. Do not leave any information blank. This will result in an error and will require another upload. Use the Column Format and Mappings file if you need assistance in completing your file.

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

Upload Course Catalog

Use the template to upload Courses offered by your institution.

The upload file should be in **.CSV** format. Use "Browse" button to locate the file on your computer and then click on "Upload Course Catalog" button.

- Course Catalog Template
- Upload Directions

Choose File | No file chosen

Upload Course Catalog

6. Return to the Upload Course Catalog Page of the portal. Select "Browse" to choose the file. Locate the file on your computer and click on "Upload Course Catalog."
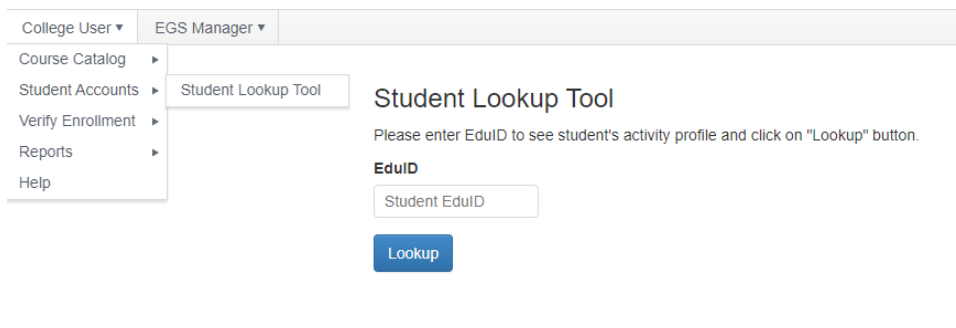
Under the Course Catalog dropdown menu, the College User will have the option to manage the course catalog once it has been uploaded.

STUDENT ACCOUNTS

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

Student Lookup

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

College User ▾	EGS Manager ▾	
Course Catalog	▸	
Student Accounts	▸	Student Lookup Tool
Verify Enrollment	▸	
Reports	▸	
Help		

Student Lookup Tool

Please enter EduID to see student's activity profile and click on "Lookup" button.

EduID

Student EduID

Lookup

VERIFY ENROLLMENT

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

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

As courses are added to the queue, course providers will verify whether or not students are enrolled in these courses. The first column titled "Enrolled" has a check box available to verify enrollments. If a student is enrolled in the course, please verify their enrollment by checking the box that corresponds to the course. If a student is not enrolled in a course, leave the box

blank. (You will want to send these courses for review if students fail to register by your institution's add/drop deadline.) Click "save changes" before moving to the next page.

When looking at this information, it is important that course details are carefully reviewed. If a course was entered as "Other" by school district personnel, the title of the course will be editable. To edit the course, select the course title hyperlink to be directed to the course details. Generally, course funding requests should be selected from a prepopulated list provided by the course provider's catalog.

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

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

Funding Request Status

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

Status:	Description:
Pending Initial Approval	The student has submitted a reimbursement and the district has neither approved nor denied it.
School Level Approval Received	The school has approved the reimbursement and the entry is still editable by district users.
Pending SDE Approval	The reimbursement has been submitted to 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.
Additional Reimbursement	Application was revised to pay out more. Revision requires additional funds from SDE. Revised after being paid; means Requested Amount was raised.
Approved	The reimbursement has been approved by SDE and is being prepared for payment.
Denied	The school/district/SDE denied the reimbursement.
Denied upon Revision	Application was denied upon revision. Initial payment made in error, all funds returned to SDE. Revised after being paid; means Requested was set to 0.
Paid	The course has been paid.
Refund to SDE	Application was revised to pay out less. Revision requires return of funds to SDE for overpayment. Refund to SDE. Revised after being paid; means Requested amount was lowered.
Rejected	The SDE has denied the reimbursement after it was originally paid Generally at the request of a school district/course provider.

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

Clarification Requested

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

1. Click on the title of the course hyperlink.

County ▼	Course Name ▼	Status ▼
CASSIA	Advanced CNA	School Level Approval Received

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

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

Note Text ▼	Submitted By ▼	Date ▼
This reimbursement has been denied by the school or district.	HarrCorr@d91.k12.id.us	6/7/2018 12:35:32 PM
Student submitted 2 requests for the same course. The district will take this request out.	HarrCorr@d91.k12.id.us	6/7/2018 12:35:32 PM
This reimbursement has been approved.	HarrCorr@d91.k12.id.us	5/23/2018 7:22:22 AM
Course submitted by Grace Peters	pete.grac989@cloud.if...	5/21/2018 3:11:47 PM

|◄ ◄ **1** ► ►| 100 ▼   items per page   ↻

1 - 4 of 4 items

Grade	12
Term:	Summer
Course Name:	Advanced CNA
Course Provider:	College of Southern Idaho
Institution Course ID:	HWFA 100
Number of Credits:	1.00
Cost Per Credit:	199.00
County of Residence:	CASSIA ▼
Out of District Tuition Reimbursement:	☑
Reimbursement Requested:	199.00
Approved Amount:	199.00
Dollars Available:	801.00
Maximum Reimbursement:	199.00
Notes:	

Submit Updates   **Back to Courses**   **Send for Review**

Enrollment Match

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

Enrollment Match

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

Export to CSV

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

District	School Year	College	Term	Number of Course Funding Requests	Number of Matched Enrollments	Needing Review	Enrollment Match
CASSIA COUNTY JOINT DISTRICT	2017-2018	College of Southern Idaho	Spring	1	1	1	100 %
TWIN FALLS DISTRICT	2017-2018	College of Southern Idaho	Spring	1	0	0	0 %
BOISE INDEPENDENT DISTRICT	2018-2019	College of Southern Idaho	Summer	2	0	0	0 %
JOINT SCHOOL DISTRICT NO. 2	2018-2019	College of Southern Idaho	Spring	2	2	2	100 %

Using the filter for enrollment match can be a great tool to help providers find districts still needing enrollment match. Using the filter select "is lnot equal to" and type "100". This will show districts that are not at 100% enrollment match.
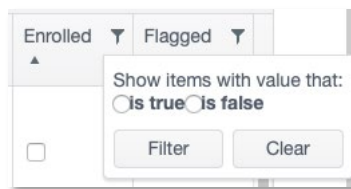
Using filters from the Verifiy Student Enrollment screen will allow providers to find those students that either need to be verified or send to the district for clarification. For example, the User can sort by district and then select "is false" (meaning enrollment box is not checked) to filter the Enrolled column of the report. This will show the User only those courses that haven't yet been matched for the district. The User may also export the file to a CSV, where the report can also be sorted to identify issues.

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

REPORTS

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

View Statements

Under "View Statements", the User can see all Advanced Opportunities billing statements and their detailed information. The statements may be sorted by Fast Forward Billing or Out of District Billing (for community colleges).

View Billing Statements

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

Billing: All ▼

| 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 ▼	Statement Total ▼	Creation Date ▼	Paid Date ▼	For OoDT ▼

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

The various billing statements could be for:

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

Status could be:

- Received- A payment is owed to the SDE by the course provider and has been received.
- Paid- The SDE has made payment to the course provider.
- Not Yet Received- A payment is owed to the SDE by the course provider and has not yet been received.
- Unpaid- The SDE has generated a statement to the course provider but has not yet been paid.

View All Courses

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

filter the results within those selections.

The View All Courses Report details the following:

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

Utilization

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

COURSE PROVIDER DEADLINES

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

deadlines, please visit the [Advanced Opportunities website](#) or the administrative portal for specific dates.

Below are the various definitions of the deadlines.

Term	Student Access Window	Verification Window	Submission Deadline

- **Student Access Window:** This is the window during which a funding request can be made by students and Advanced Opportunities staff. All courses expecting funding must be entered by the end of this window.
- **Verification Window:** During this time, all course providers log into the portal to verify enrollment for all requests. 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.
- **Submission Deadline: Final deadline for school district to submit all funding requests to the SDE for payment.**

Once course entries are approved by school users, course providers can begin to provide verification of course enrollment. Course providers will have a 6-week window to complete the verification process. Upon verification of 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.

After submission**,** SDE staff will process all funding requests and send back any errors.

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

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

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

Eligible Flag

Green flags indicate the normal status of a student's A.O (Advanced Opportunities) (Advanced Opportunities). account.

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. Flag entering should be coordinated between the provider and the school for timely reporting and student planning.

When a student fails to earn credit for a class that was paid for by Advanced Opportunities, either due to withdrawal, failing grade, or non-completion, a flag must be entered on the student account. This allows all participants to know that the student needs to pay for and successfully earn credit or complete one like course *before* any further course funding reimbursements can be made from Advanced Opportunities.

Note: Exam policies for Advanced Opportunities are set by the school district. Flags are only required for unsuccessful course attempts, but can be applied should a district make such policy for exams.

Any unsuccessful course attempt will require a student to pay for and successfully earn credit or complete one like course *before* any further course funding reimbursements can be made from Advanced Opportunities. Statute provides two options for students to regain funding eligibility after a hold is received.

Option 1: <u>A student must pay for and successfully earn credit.</u> A student can pay for and earn credit to be reinstated for Advanced Opportunities funding. A course could include a dual credit course (academic or CTE), an overload course, or a workforce training course (assuming the student earns credit).

Option 2: A student must <u>complete one like course</u>. If a student is not charged for a course, option 2 allows for the opportunity of a student to complete a like course without a charge being incurred. This option means that the course type (i.e., overload, dual credit, workforce training) would be considered in reference to the course(s) that the student was unsuccessful.

Below are examples.

If…..	Then….
Student fails to earn credit for overload course.	Student must either pay for a dual credit, overload, or work force training course (assuming credit is granted) and earn credit or complete one overload course.
Student fails to earn a dual credit course.	Student must either pay for a dual credit, overload, or workforce training (assuming credit is granted) course and earn credit or complete a dual credit course.
Student unsuccessfully completes a workforce training course.	Student must pay for a dual credit, overload, or workforce training (assuming credit is granted) or complete a workforce training course.
Student fails an exam	A school district can determine if a student is required to complete and pay for an exam. If a district requires successful completion, a flag is added to the Advanced Opportunities portal. If a flag is added for an exam this will prevent a student from further exam payments until the obligation is met and the flag cleared.

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

A student can pay for and earn credit to be reinstated for further Advanced Opportunities funding. Course cost and number of credits are not needed for consideration to fulfill a student's obligation of paying for and earning credit. Students should be referring to their learning plans and career and educational objectives to determine the courses that they will take to fulfill requirements after having an unsuccessful course attempt. These plans are to be reviewed annually. In situations where a student does not pay for credit to be reinstated for Advanced Opportunities funding, the course type (e.g. dual credit, workforce training, overload) would be considered.

When is a course considered an unsuccessful attempt?

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

Terminology:

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

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

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

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

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

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

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

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

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

Unsuccessful attempts are denoted with flags in the Advanced Opportunities portal. These flags can be placed by any individual with access to the portal. These flags are red when viewed in different screens.

Who can remove the red flag?

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

When should I remove the student's flag?

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

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

While there are various reasons for students' unsuccessful attempts, a student must pay for and successfully earn credit or complete one (1) like course before the State Department of Education may pay any further reimbursements for courses. If there are concerns regarding the student's grade, the recommendation would be to follow the policies and guidelines of the provider of the course for grading corrections and questions. No payments for courses can be made until red flag(s) have been cleared.

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

Exams will not have any bearing on course funding requests. Each school district has the ability to determine policy in regards to exams. If a student has scored inadequately on an exam, the local school district policy can determine whether or not a student is required to pay for and successfully complete an exam before funding can be utilized for further exams.

Can Advanced Opportunities funds be used retroactively?

Retroactive payments are not a practice that is in the spirit of Advanced Opportunities. The statute that allows for corrections of prior year funding requests is specifically in relation to those course funding requests done error, which refers to Idaho Statute 33-1009. Since retroactive payments are not a course funding request done in error, Idaho Statute 33-4602 would be followed. Idaho Statute 33-4602 states "payment will be made only for activity occurring and reported within each fiscal year." Since the retroactive payment is not an error, rather a deliberate choice, the course funding would have to occur within each fiscal year. For example, a student who took a course in fall or spring, could not seek a correction in the following summer or fall. This would require deliberate and specific tracking by institutions should they want to use this practice.

What happens when a student is unsuccessful in multiple courses?

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

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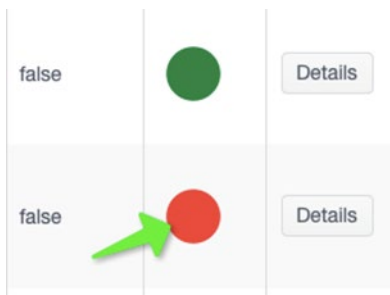
To enter a flag, go to the individual student account. This can be accessed through the "**Student Lookup Tool**" or by going to "**View Courses**" and searching through entered courses; clicking on the blue EDUID link of the student who requires a flag. Clicking on the hyperlink will take the user to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

Student Flags

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

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.

Clearing a Red Flag

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

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 they have been advised by the school district or college representative. Once the student has received advising, the yellow flag can be cleared by a college or school district User. *If a flag is both yellow and red, this indicates that the student needs advising and has an unsuccessful attempt flag on their account.*

Warning Flag

When a student has $500 or less of available funds in their account, a purple flag will automatically alert students and Advanced Opportunities Designees. This will be posted to the student account so eligibility status can be seen by both student and Advanced Opportunities designee in the funding request report page when choosing courses/exams. Once a student has an approved expenditure "School Level Approval Received" the funding will be accounted for in the students total available funding.

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

REQUEST OF CHANGE IN PAYMENT

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

Common change requests:

- Refund of Payment
- Additional Reimbursement

- Overpayment

Payment should not be sent to the SDE unless specifically requested. Changes in funding requests will be accounted for in the next statement cycle generated in the AO (Advanced Opportunities) portal.

## EARLY GRADUATION SCHOLARSHIP MANAGER ROLE

Early Graduation Scholarships are available for students who graduate at least one full year early from an Idaho public high school. These scholarships are equal to 35% of the Average Daily Attendance (ADA) for secondary school students in a given school year. This equates to roughly $2,000.

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

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

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

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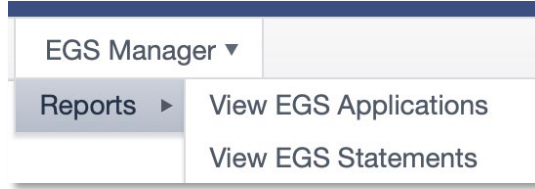
View EGS Applications

To verify student enrollments, the EGS Manager will go to EGS Manager / Reports / View EGS Applications. To verify enrollment, the EGS Manager can sort the report by student name, term, school year, student birth date, or EduID. Once the enrolled student is found, the manager will check the box in the "Is Enrolled" column. This will let the SDE know that the student is enrolled and if eligible the scholarship can be awarded.

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

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

View EGS Statements

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

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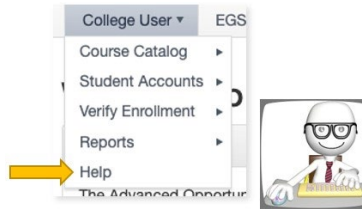

EGS Payment Schedule

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

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). **Do not send any personally identifiable information (PII) via email, the SDE cannot respond.** From the help page follow the on-screen directions:

Click: "Go to OTIS".

Submit a ticket by selecting "Create A Ticket".

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

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

Select "Advanced Opportunities in the category.

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

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.