

ADVANCED OPPORTUNITIES WEB-BASED PORTAL 8.0

Workforce Training User Guide



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

650 W STATE STREET, 2ND FLOOR
BOISE, IDAHO 83702
208 332 6800 OFFICE
WWW.SDE.IDAHO.GOV

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PROGRAM SUPPORT

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

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

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

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

See the Training tab for further resources.

Table of Contents

Program Support.....	2
Program Overview	5
Advanced Opportunities	5
Challenging Courses	5
Early Graduation Scholarship	6
Funding Information	6
End of Fiscal Year.....	6
Process Flow.....	7
Portal Access	8
Workforce Training Staff Role.....	8
Course Offerings	8
Adding A Course	9
Deadlines.....	9
Requesting New Courses.....	9
Removing A Course	10
Verify Student Enrollment	10
Funding Request Status	11
Clarification Requested.....	13
Reports.....	14
View Courses	14
Early Graduation Scholarship Applications.....	14
View Statements	15
Deadlines.....	16
Student Flags.....	18
Eligible flag	18
Unsuccessful Attempt Flag.....	18
Entering Red Flag.....	22
Clearing a Red Flag	23

Advising Flag.....	23
Warning Flag.....	23
Request Change In Payment.....	24
Help.....	24

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 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. 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 (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.

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 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 routed to the workforce training center once received at 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.

PROCESS FLOW

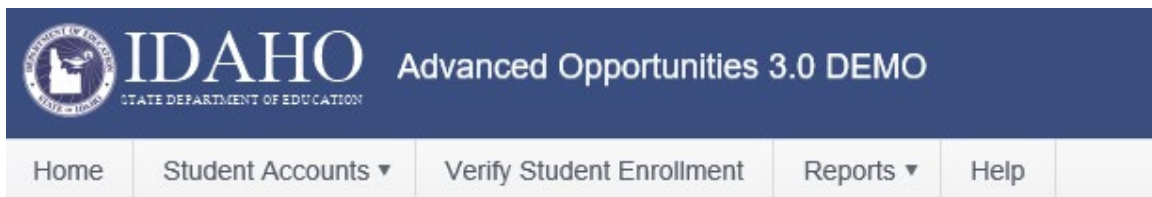
1. Students register for courses.
2. Funding requests are made in the Advanced Opportunities portal by student/district.
3. School approves requests.
4. Provider verifies the enrollment of the course.
5. School district submits request to Idaho State Department of Education for payment.
6. The Idaho State Department of Education reviews/approves requests.
7. Payment is sent to the provider or school district.
8. Upon conclusion of the course, if any students were unsuccessful, college or school district staff 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 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.

The user may need to select the college under “Change College” drop down on the right side of the menu bar if no information is showing in the portal.

Workforce Training Staff Role

The Workforce Training staff's primary role as it relates to Advanced Opportunities is to ensure an accurate catalog of course offers, verify enrollment of students, and review 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. Courses must be approved prior to being available through the program. Workforce training staff do not have the ability to upload their own courses.

Adding A Course

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. This 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.

Deadlines

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

- July 1-for August to September availability
- October 1 for November to March availability
- April 1 for May to June availability

Requests for workforce training courses must be submitted by the deadlines to have a timely review.

Requesting New Courses

To ensure workforce training courses meet the needs of students and are available for funding requests through the Advanced Opportunities (AO) program, the following steps are required.

1. Provide course information. (Detailed below)
2. Include any supporting documents for the course (i.e., cost justification or letter of support).
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 Council, may request additional information. Courses will be reviewed for AO approval three times a year based on the deadlines listed above.

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 name of the course. 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.

Removing A Course

If a course is 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 all students have made a funding request will be viewable on the “Verify Student Enrollment” screen for each provider. As a Workforce Training provider, you will only see courses applicable to your organization. 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.

1. As funding requests are added to the queue, course providers are asked to verify whether or not students are enrolled in the course. The workforce training user will need to populate the grid with course information. Select the school year, term, status, or school district and then select “Populate Grid”.
2. The 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. If a student is not enrolled in the course, leave the box blank indicating the student is not enrolled. ***Click “save changes” before moving to the next screen or moving to another section in the table.***

Verify Student Enrollment

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

School Year:

Term:

Status:

School District:

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

Enrolled	Flagged	School Year	District	School Name	Term	Edu ID	Last Name	First Name	County	Course Name	Status	Cre Nur
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It is important that course details are carefully reviewed to ensure accurate payment.

FUNDING REQUEST STATUS

Funding requests, 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.
Additional Reimbursement	Application was revised to pay out more. Revision requires additional funds from SDE. Revised after being paid; means Requested was raised.
Approved	The reimbursement has been approved by SDE and is being prepared for payment.
Denied	The school/district 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 for.
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 revised and denied the reimbursement.

Schools are not able to submit their funding requests to the state until they have reached a 100% match, meaning 100% of the course 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 AO 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 confirmed) or “is false” (i.e., enrollment box has not been confirmed). Any course funding requests where a student is not enrolled should eventually be moved to the status “Clarification Requested” for further review and possible denial of the request from the district.

Verify Student Enrollment

The table below contains a list of all Workforce Training course funding requests for your institution for the selected course. Use the filters at the top of each column to filter comments, or send the course for review.

School Year:

Term:

Status:

School District:

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

Enrolled	Flagged	School	District	School Name
<input type="checkbox"/>			CASSIA COUNTY JOINT DISTRICT	BURLEY SENIOR HIGH SCHOOL

Show items with value that:

is true is false

CLARIFICATION REQUESTED

To assist with communication, Course Providers can move funding requests into the “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.”

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:	<input type="text" value="CASSIA"/>
Out of District Tuition Reimbursement:	<input checked="" type="checkbox"/>
Reimbursement Requested:	199.00
Approved Amount:	199.00
Dollars Available:	801.00
Maximum Reimbursement:	199.00
Notes:	<div style="border: 1px solid #ccc; height: 100px;"></div>

Submit Updates

Back to Courses

Send for Review

This will push the funding request into a separate report for district personnel to resolve and re-approve or deny. Providers 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. District personnel can access those in the ‘Clarification Requested’ status through their District Dashboard on their AO homepage. Courses “Sent to Review” are not counted in the Enrollment Match thus not impacting the school district from submitting funding requests to the SDE.

REPORTS

Under Reports, the User will find options to View Courses, Early Graduation Applications, and View Statements.

View Courses

View all Workforce Training course funding requests that have been entered. You can search for specific course funding requests by using the filters at the top of each column. You may also sort by school year, term, and course status.

View Courses

The table below contains information on all Workforce Training course funding requests that have been entered. Use the filters at the top of each column to search for specific course funding requests.

School Year:

Term:

Status:

Export to CSV												
Drag a column header and drop it here to group by that column												
District Name	School Name	Edu ID	Student	Grade	Provider	Course Name	Status	County	Amount	Enrolled	Flagged	Detail

Early Graduation Scholarship Applications

View students who are eligible for the Early Graduation Scholarship and have identified your institution as the institution they plan to attend for workforce training.

At the beginning of each term Workforce Training providers will need to verify the enrollment of students who are enrolled or a registering for workforce training courses in which they would like to use eligible scholarship funds to support their enrollment in the course.

Workforce training providers will only see students that are eligible for the scholarship in the report. Check the box if the student is enrolled in your institution. Save changes.

Select "All Years". Once a student is verified for enrollment by the college and Approved by the SDE, the student will disappear from the EGS Application list.

The early graduation scholarship is reviewed and paid upon the traditional academic schedule, which may not align with the enrollment of the workforce training course, thus coordination will be required with the student, the SDE and workforce training provider to ensure that funds are applied appropriately.

College Semester in Which Student Wants Scholarship Consideration	Student Application Deadline for Semester Payment	College Review Period	Payment to Provider
Summer	June 1	After July 1	Mid-July
Fall	August 1	After August 1	Mid-August
Spring	January 1	After January 1	Mid-January

The Early Graduation Scholarship will be paid in one lump sum. If the tuition or cost of attendance for the course is less than the student's allowable scholarship amount, it is advised that the SDE be notified, so payment of student eligible scholarship can be adjusted for payment and remaining scholarship aid will be retained for the student to use at a later date.

View Statements

View statements for all Workforce Training transactions related to students from your institution. Click "View Statements" under the Report tab, from there click on the Statement Id number to view an itemized report of each statement. You can also view Advanced Opportunities billing statements and their detailed information. Statements will be divided as either workforce training (students in high school taking workforce training courses) or early grad scholarship. The 'Advanced Opp Name' column will provide details whether the scholarship is for the Early Graduation Scholarship or high school student enrollment.

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	Statement Total	Creation Date	Paid Date	
▶ 2153	Not Yet Received	College of Southern Idaho	Early Grad Scholarship (WT)	(\$1,876.00)	6/12/2021		
▶ 2150	Unpaid	College of Southern Idaho	Early Grad Scholarship (WT)	\$1,876.00	6/12/2021		
▶ 1479	Paid	College of Southern Idaho	Workforce Training	\$845.00	12/5/2019	12/5/2019	

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 the 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 Transactions” button, this will provide an excel document that will show further billing details, such as school the student attends, the student’s EDUID, and term. The “Export Overview” will provide an excel document of all statements.

DEADLINES

Deadlines for student application data entry and data submission in the portal are set by the SDE for all school districts. Districts with unusual circumstances may request to adjust deadlines to meet local needs, but this may 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	Request Funding Window	Verification Window	Submission Deadline
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- Request Funding Window:** This is the window during which a funding request can be made by students, school districts, and Advanced Opportunities staff. It is critical that all funding requests 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 funding 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 districts 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 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.

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 requests. The SDE recommends that any entries made after these deadlines be done with the consent of both the school district and the course provider.

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. Upon SDE approval, payments will be made to course providers and school districts.

STUDENT FLAGS

Eligible flag



Green flags indicate the normal status of a student's A.O. 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.

When a student fails to earn credit for a class that was paid 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: A student must pay for and successfully earn credit. 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 complete one like course. 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 whether or not a student is required to successfully 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 provider's process. Advanced Opportunities will honor such outcomes.

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

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

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

Unsuccessful attempts are denoted with 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 on 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 is generally at the end of each term.

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

While there are several 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 the 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 regard 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 in 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, 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 use Advanced Opportunities funding for additional courses.

Entering Red Flag



To enter a flag, go to the individual student account. This can be accessed through the “**Student Lookup Tool**” or by going to “**View Courses**”, searching through entered courses, and 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.

+ Add new record									
Edu ID	Reason	Type	Course/Exam Name ▲	Note	Created Date	Created By	Cleared Date	Cleared By	
8154	Failed	Overload(Co)			7/31/2020	AdvancedOpDistric			Update
8...	Withdraw	AP(Ex)	pretend AP	testing	7/9/2020	AdvancedOpDi...	7/31/2020	Advance...	Cancel
8...	Other	AP(Ex)	pretend AP	testing	8/5/2020	AdvancedOpDi...	8/5/2020	AdvancedOpDi...	

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.

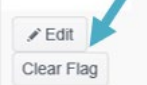
- Reason: specify the reason the flag is being entered (Failed, Withdrew or Other)
- Type: specify the course type (overload, workforce training, dual credit or exam type)
- Course/Exam Name: enter the course name (e.g., Math 123 Math in the Modern Society or Electrical Apprenticeship 1A)
- Notes: Please 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.

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...			

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.

REQUEST 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 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 request will be accounted for in the next statement cycle generated in the AO portal.

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.](#)