

ADVANCED OPPORTUNITIES WEB-BASED PORTAL 5.0

Course Provider User Manual



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

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

See the Training tab for further resources.

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PROGRAM OVERVIEW

Advanced Opportunities

The Advanced Opportunities program provides every student attending an Idaho public school an allocation of \$4,125 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 summertime, and before/after school. In the event that student incurs a cost for such courses, the 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 program can pay for up to \$75.00 per credit for these courses. 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 State Advanced Opportunities [website](#).
- **Exams:** A student can utilize funds to pay for a variety of college credit-bearing or career technical exams. These include Advanced Placement (AP), International Baccalaureate (IB), College Level Examination Program (CLEP), or 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/semester (\$1000/year) to cover the cost of approved, regionally in-demand workforce training courses or apprenticeships that are not available at their 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 a high school credit without requiring that the student take

the course. Local school districts can be contacted for a list of courses eligible for challenge in their districts under Advanced Opportunities.

Early Graduation Scholarship

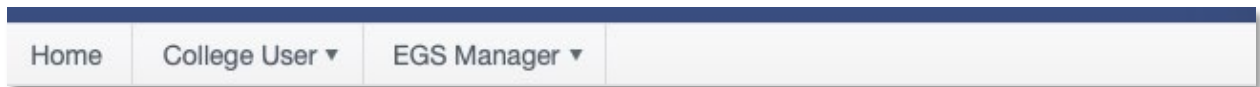
Early Graduation Scholarships are available for students who graduate at least one full year early from a public high school. These scholarships are equal to 35% of the Average Daily Attendance (ADA) for a given school year. This equates to roughly \$1,800.00. The school district receives the same amount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

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

PORTAL ACCESS

There is currently one user role for course providers in the Advanced Opportunities Portal. To attain portal access, a new user will need to [create an ISEE account](#) on the SDE's main page. After creating an account, please have your supervisor contact the Advanced Opportunities Support Team to gain access.

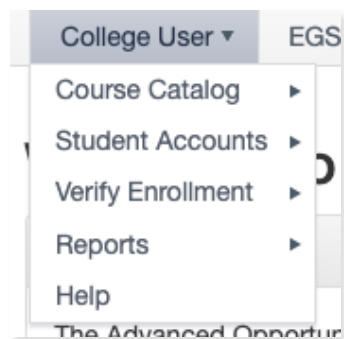
Upon entering the portal, the following options will appear across the top:



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 will have the following menus:



COURSE CATALOG

It is 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 in this screen.

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

School Year: 2019-2020

Course Name ▲	Institution Course	Credit Number	Credit Cost	Course Cost	Available Summer	Available Fall	Available Spring	Course Type	CIP Code	
					Disallow	Disallow	Disallow	Overload		<input type="button" value="x Delete"/>

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), 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 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 they are closed for enrollment. Please note that the summer term is indicative of the term preceding the beginning of a school year. For example, Summer 2020 belongs to the 2020-2021 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.

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 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 go to College User / Course Catalog / Upload Course Catalog.

Download the “Course Catalog Templates” file. Fill out the template as follows:

- *SchoolYear*: Type in the end year of the applicable school year, for example enter “2021” for the 2020-2021 school year

- *CourseName*: Type in the name of the course. Use proper naming conventions such as “ENGL 101 English Composition”
- *CreditNumber*: Enter the number of credits such as “3”
- *CreditCost*: Enter the cost per credit, such as “75”
- *AvailableSummer*: Identify if the course is offered during the summer term. Enter “Y” for Yes and “N” for No
- *AvailableFall*: Identify if the course is offered during the fall term. Enter “Y” for Yes and “N” for No
- *AvailableSpring*: Identify if the course is offered during the spring term. Enter “Y” for Yes and “N” for No
- *Coursetype*: Enter Overload Course, Dual Credit, or Workforce Training to identify the type of course being uploaded
- *Institution CourseID*: Enter the institutions unique course ID
- *Granter Name*: College name
- *CipCode*: Enter the Classification of Instructional Programs code for the associated course

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.

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](#)
- [Column Format and Mappings](#)

Choose File no file selected

Upload Course Catalog

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, First Name, and Last Name 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.

Student Lookup Tool

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

EduID

First Name

Last Name

Lookup

VERIFY ENROLLMENT

To view a list of all courses for which a funding request have 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.

As courses are added to the queue, course providers will verify whether or not students are enrolled in these courses. The second to the last column 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 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 screen.

Verify Student Enrollment

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

School Year:

Term:

Status:

School District:

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

School Year	District	School Name	Term	Edu ID	Last Name	First Name	Course Name	Institution CourseID	Status	Credit Number	Approved	Modified
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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 title of the course to be directed to the course details.

For community colleges, it especially important to check the county of residency. This can be done by clicking the “details” tab or exporting to a CSV and reviewing the excel document. If the county of residency is incorrect, click on the course name, and edit the county of residence.

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.

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

Clarification Requested

Course funding requests that need a clarification or a correction, 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 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.

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 the 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.

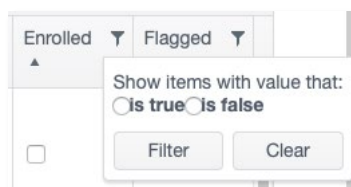
Please Note: The College User will need to communicate with the Workforce Training User regarding the Workforce Training course percentage match. The Workforce User role does not have access to that report at this time.

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 less than or equal to” and type “100”. This will show districts that are not at 100% enrollment match.



Using filters from the Verify 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.

REPORTS

Under College User / Reports, the User will find options for View Statements, 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 Advanced Opportunities Billing and 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
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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 billing statement number, Advanced Opportunities program name, provider, billing item type, student name, course/exam name, and billing item amount.

View All Courses

Under View All Courses report, the User may sort by school year, term, and course status. This screen will allow Users to find details of particular student funding requests from current and prior years.

View All Courses

The table below contains information on all course funding requests that have been entered. Use the filters to narrow down the requests.

School Year:

Term:

Status:

Course Status includes the following:

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	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.
Reimbursement in Error	Error state from system itself; unused. Reimbursement in Error. System error - shouldn't ever happen.
Rejected	The SDE has revised and denied the reimbursement.
Reversal in Error	Reversal in Error; System status; Unused. System failed to update correctly - shouldn't ever happen.

The View All Courses Report details the following:

District Name	School Name	Edu ID	Student	Grade	Provider	Course Name	Status	County	Amount	Enrolled	Flagged	Detail
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This report may also be exported to a CSV file.

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.

Utilization Stats

The table below contains utilization statistics for the Advanced Opportunities programs. The numbers are generated by looking at courses that are currently in the "Paid" status meaning, the reimbursement has already been paid. These numbers do not include courses that are currently undergoing a revision, courses submitted to SDE, or those approved by SDE and awaiting payment generation.

Export to CSV									
Drag a column header and drop it here to group by that column									
School Year	College	Overload Courses	Dual Credit Courses	Workforce Training Courses	Dual Credit Credits	Dollars Paid	Student Count		

COLLEGE USER 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.

The following deadlines for the 2020-2021 school year are below. This chart is also available on the Home page in the Advanced Opportunities portal.

	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 applications 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. To see the details of any flag you may click on the flag and pop-up window will provide any supporting details.

Unsuccessful Attempt Flag



When a student fails to earn credit for 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" course (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 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.

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.

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.

✓ Save changes ⏪ Cancel changes + Add new 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 information should appear in a similar format for which the student did not earn credit:

Example: “Failed, Dual Credit, ENGL 101 Writing and Rhetoric I, \$225, 3 credits taken 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.

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...			<input type="button" value="Edit"/> <input type="button" value="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 advised. 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

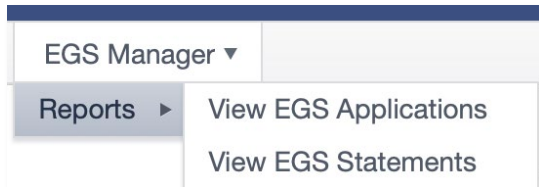


When a student has \$500 or less of available funds in their account, a purple flag will automatically alert students and Advanced Opportunities Designees. This will post to the student account so eligibility status can be seen by both student and Advanced Opportunities designee in the funding request 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.

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.

EGS MANAGER ROLE

The Early Graduation Scholarship (EGS) Manager will verify student enrollments and track scholarship payments.



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 state know that the student is enrolled and if eligible the scholarship can be awarded.

View EGS Applications

The table below lists students who are eligible for the EGS scholarship and have identified your institution as the institution they plan to attend. Check the box if the student is enrolled in your institution. Save changes.

✓ Save changes ✕ Cancel changes Export to CSV

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

First Year	College	Term	First Name	Last Name	Gender	Birth Date	EduID	Is Enrolled
2018-2019	College of Southern Idaho	Fall	[REDACTED]	[REDACTED]	Male	6/25/2001	[REDACTED]	<input type="checkbox"/>

View EGS Statements

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

View EGS Statements

The 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.

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
▶ 544	Paid	College of Southern Idaho	Early Grad Scholarship	\$1,661.00	8/1/2017	8/4/2017

To see the details of each statement, the EGS Manager can click on the Statement ID, which will then bring up a second screen with all the individual student records.

View EGS Billing Details

Export to CSV

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

Billing Statement Number	Advanced Opp Name	Provider	Billing Item Type	Student	Course/Exam Name	Billing Item Amount
544	Early Grad Scholarship	College of Southern Idaho	EGS Student	[REDACTED]	Early Graduation Scholarship	\$1,661.00

The scholarship is worth 35% of ADA; this is slightly more than \$1,800.

EGS Payment Schedule

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

Advanced Opportunities Portal EGS Dates

	Payment sent to colleges by	Make-up payment sent by
Fall 2020	August 14	September 30
Spring 2021	January 15	February 26

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](#).