Ohio Technical Center

Data Submission Manual

FY 2019

Ohio | Department of Higher Education

Academic Affairs
Office of Institutional Collaboration & Completion

This is a reference document designed to inform Ohio Technical Centers on data submission policy and procedure, as well as assist in the submission of data in to the Higher Education Information System.

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SECTION 1: DATA SYSTEM OVERVIEW

INTRODUCTION

The Ohio Department of Higher Education's Ohio Technical Center Data Submission Manual is designed to provide guidance and direction on the submission of data for the Ohio Technical Centers (OTCs). This manual includes an overview of the legislation, data definitions, data input and reporting instructions, as well as how the data is used for accountability and funding.

Throughout this manual, various terms will be used to identify particular functions and elements that are necessary for collection, submission, and reporting. For example, the terms OTC database and OTC/HEI database will be used interchangeably since they represent the same database.

HISTORICAL OVERVIEW

For the 2007 and 2008 biennium budget, the 127th Ohio General Assembly passed legislation transferring adult career-technical programs to the Ohio Board of Regents (now the Department of Higher Education). Under House Bill Number 119 (Section 269.60.30), "The act directs the Chancellor of the Board of Regents, in collaboration with the Department of Education, to identify which 'adult career-technical education programs' to transfer from the Department to the Board of Regents 'to better align and maximize' Ohio adult workforce education in order 'to improve the overall quality of adult education and training . . . offerings.'" The legislation noted that the "Chancellor must develop a plan, in consultation with the Department and with the identified programs, by July 1, 2008. The movement of the selected programs must be completed by January 1, 2009. The act authorizes the Director of Budget and Management to transfer budgetary appropriations to reflect the reorganization."

By January 1, 2009, Ohio's adult career-technical education (CTE) programs were operational under the leadership and direction of the Ohio Department of Higher Education (ODHE). However, with this transfer, the data collection and reporting was still housed with the Ohio Department of Education (ODE). The ODHE and ODE forged an agreement to maintain this data submission and reporting relationship until ODHE could develop a data collection mechanism for adult CTE within the Higher Education Information system (HEI). After a few years of discussion and planning, ODHE began development in 2012 with completion by 2013 of an adult CTE database that was an extension of the HEI database.

After the completion of the database in 2013, the new system was referred to as the OTC/HEI database. Adult CTE in Ohio, once known as Adult Workforce Education (AWE), through legislation took on the name of Ohio Technical Centers (OTCs). The new database provides greater user functionality than the previous system. Now, data system users have access to charts, graphs, and the ability to produce their own reports through queries. Also, the system is always open allowing users to submit data on programs and enrollments at any time throughout the fiscal year.

In 2015 after experiencing issues with data outputs, a closer examination of the system revealed some flaws with functionality as well as data submission errors. A series of submission guidance was issued to users and conversations began with a database contractor in order to modify the OTC/HEI database. Now users are submitting data in a consistent manner as well as utilizing improved data functions that make the system easier to navigate and understand.

Still, it is important for institutions to maintain their own internal student information and data systems (i.e., Peoplesoft, Achademix, etc.) since the OTC/HEI database is used specifically for federal, state and local reporting needs, which may not address institution specific data collection needs. Yet, the system provides functionality that allows institutions to upload information directly from their internal student data systems into the OTC/HEI database.

DEFINITIONS

ACT National Career Readiness Certificate (ACT NCRC) - is a portable credential that demonstrates achievement and a certain level of workplace employability skills in Applied Mathematics, and Locating Information, and Reading for Information.

ACT WorkKeys –A job skills assessment system that helps employers select, hire, train, develop, and retain a high-performance workforce. This series of tests measures foundational and soft skills and offers specialized assessments to target institutional needs.

ACT WorkKeys Applied Math – Applied Mathematics (replaces AM), measures the skill people use when they apply mathematical reasoning, critical thinking, and problem-solving techniques to work-related problems. The test questions require the examinee to set up and solve the types of problems and do the types of calculations that actually occur in the workplace.

ACT WorkKeys Graphic Literacy – Graphic Literacy (replaces LI), measures the skill people use when they work with workplace graphics. Examinees are asked to find information in a graphic or insert information into a graphic. They also must compare, summarize, and analyze information found in related graphics.

ACT WorkKeys Workplace Documents – Workplace Documents (replaces RI), measures the skill people use when they read and use written text in order to do a job. The written texts include memos, letters, directions, signs, notices, bulletins, policies, and regulations. It is often the case that workplace communications are not necessarily well-written or targeted to the appropriate audience.

Business Consultation Services – Services offered to businesses that are design to assist them with serving their clients more efficiently and effectively (i.e., job evaluation, assessments, etc.)

Completer – Students who successfully complete a post-secondary technical program approved by the Chancellor with a grade of C or better or grade of pass if pass/fail basis. Also, at a minimum, the student has achieved 90% attendance for the class and has met all Program requirements as deemed acceptable for completion by the institution.

Credential – It can be an educational certificate issued by an institution; third-party industry recognized certification; degree from a college or university; and state government board issued licenses.

Continuing – A student that is enrolled in a program that crosses fiscal years. The student will have the status of "Continuing" when the program is moved from one fiscal year to the next fiscal year.

Contract Training – An OTC negotiates a rate and terms with an employer to offer a pre-designed certificate program for the exclusive enrollment of the company's employees. The employer has the right to change instructors and the version of the program is not subject to traditional program review or approval.

Customized Training – Company has requested a new program be designed to meet specific needs of the company. This program is only available to company employees and not open for non-employee enrollment. The fee structure is negotiated between the employer and the OTC. The employer may retain the right to cancel classes and reconsider curriculum. They may send as many or as few students at any point to the program.

Family Educational Rights and Privacy Act (FERPA) – Federal law that prevents school employees from divulging information to anyone other than the student about the student's grades or behavior, and school work posted on a bulletin board with a grade. Generally, schools must have written permission from the parent or eligible student in order to release any information from a student's education record. This U.S. federal law gives students 18 years of age or older, or students of any age if enrolled in any postsecondary educational institution, the right of privacy regarding grades, enrollment, and even billing information, unless the school has specific permission from the student to share that specific type of information.

Full-Time Equivalent (FTE) – The number of clock hours completed by a student enrolled in an OTC technical program. FTE is calculated by taking the student hours and dividing by 450 to calculate the number of FTE a student generates in a Program (i.e. Student hours 450/450=1 FTE). Only programs with a Technical Certificate designation are used for FTE calculations.

General Program– A clock hour program or course that is designed for recreational purposes or to enhance the knowledge of a particular subject matter, but does not directly lead to occupation or specific employment opportunities.

HEI – Higher Education Information System, the longitudinal database that collects Program information and student demographics pertaining to students enrolled in Ohio higher education institutions.

HEI Subject Code/CIP Code – these are synonymous with each other. A CIP code is the Classification of Instruction Programs that can be found at the National Center for Education Statistics website (www.nces.ed.gov).

Industry Credential - Is sought or accepted by employers within the industry or sector involved as a recognized, preferred, or required credential for recruitment, screening, hiring, retention or advancement purposes; and, where appropriate, is endorsed by a nationally recognized trade association or organization representing a significant part of the industry or sector.

Leaver – A student that enrolled into a technical Program at an OTC and left or dropped out of the institution, failing to complete the Program.

Less Than One Year Technical Certificate – Certificates awarded by an OTC for the completion of an organized program of study in less than 900 clock hours that are designed for an occupation or specific employment opportunities.

One Year Technical Certificate – Certificates awarded by an OTC for the completion of an organized program of study in at least 900 clock hours, with the majority of the Program work completed in a prescribed technical area and designed for an occupation or specific employment opportunities.

Perkins Concentrator – An OTC student who has completed 20% of a technical program that terminates in a certificate, third-party industry-recognized certification, or a license.

Perkins Participant – An OTC student who has completed 10% of a technical program.

Personally Identifiable Information (PII) – any information about an individual maintained, including (1) any information that can be used to distinguish or trace an individual's identity, such as name, social security number, date and place of birth; and (2) any other information that is linked or linkable to an individual, such as medical, educational, financial, and employment information.

Snapshot – A moment within a data submission cycle when information is extracted from the system based on a specific time period in order to produce data outputs, such as state and federal subsidy reports as well as Perkins performance measures or other requested reports.

Technical Assessment - An assessment that evaluates the knowledge of an individual in a specific craft area and provide a prescription for upgrade training when needed.

Technical Program – A clock hour program that is designed for an occupation or specific employment opportunities and prepares students for a valid occupational license or third-party industry certification, if the credential is available.

DATA USES

Although each institution has their own internal data systems, the data reporters, known as *Attestors*, manage the data submission process. Their primary responsibility is to ensure that all data collected by the institution has been entered and uploaded properly into the OTC/HEI database. The OTC/HEI database submission process follows a set of parameters designated by ODHE to capture information specific to federal, state, and local needs. The OTC/HEI database is used to collect data for:

- OTC Funding Formula for State Subsidy
- Carl D. Perkins Performance Reports
- Carl D. Perkins Funding Formula
- Requests specific to Approved Programs
- Reponses to frequent ad-hoc data requests from the legislature, OTCs, media, and public
- Static web-based reports and publications
- Research and student tracking across the Ohio Higher Education system

Nevertheless, there might be other uses or requests for the data, but the above provides a few of the main points of collection.

USER ACCESS AUTHORIZATION

OTCs must have a primary point of contact that is responsible for the data entry process for all institutional reports. This person is referred to in this document as the Attestor. OTCs can have at a maximum two (2) Attestors to oversee data entry; however, at least one of these Attestors must be the primary contact person. The district's superintendent or OTC director is responsible for identifying staff to serve in this capacity. Once selected, it is the responsibility of the institution to create an account for the Attestor(s) in the OTC data system. To learn how to create an account for the Attestor, please refer to "Appendix 3: How to Manage Users and Attestors" in the back. ODHE will annually review the names of Attestors and ask institutions to verify if these individuals still serve in that capacity.

Once the Attestor is confirmed in the system and by ODHE as the institution's main point of contact for data submissions, they will be granted access to the functions associated with the Attestor role. The following is a brief overview of this role:

ATTESTOR
The Attestor, appointed by the superintendent or director, has the responsibility to authorize data reporters to submit specific data elements. Attestors are a two-way information conduit between ODHE staff and institution/User, serving as the main point of contact. They provide oversight to ensure that reporting is done accurately and on time and that the impact of changes to reporting data in one area is also understood by other data areas. Attestors can request new HEI accounts and create instructors for their district. They are also responsible for giving permissions to a USER.

Although Attestor's are authorized to manage the institution's data, they are not the only staff member that could be granted access to OTC data. Other staff members might include:

- USER – These are institutional staff members with responsibilities for submitting data into the system.
- READ ONLY USER These are district general staff that only need access to view various data, but not authorized to submit data.

The Attestor is responsible for creating instructors within the system. They are also responsible for ensuring that institutional staff members are aware and understand institution and state wide policies and practices governing access and use of student information.

All individuals who are authorized to have access to student data in the OTC/HEI database, especially Attestors, must follow the **ODHE's DATA ACCESS POLICY**. The Data Access policy is located on the Ohio Department of Higher Education's website at: https://www.ohiohighered.org/hei. Moreover, all users must be aware of their institutional and statewide practices as it relates to securing student personal data.

SECURITY AND PRIVACY PRACTICES
To ensure the proper handling of student information, HEI implements sophisticated security methods with varying levels of user access. Access is restricted to designated OTC personnel based on user authentication.

While using the HEI system to submit data or to generate queries, follow these simple steps to protect sensitive information. These suggestions are not intended to replace OTC information technology user guidelines or policies, but are generally considered good practice. If the institution does not have information technology user guidelines or policies it is a good practice to develop some, or use these suggestions as the basis of institutional technology policy.

1. Lock your computer screen at all times when you step away from your work area. PC users can lock their computers by pressing (Ctrl - Alt - Delete). Accessing your PC will require your password. This will prevent any unauthorized use of your PC or the HEI system.

2. Use student identifiers, known as PII (personally-identifiable information) only when necessary to send information to the HEI system or receive information from HEI. The use of portable media (CD's, DVD's, flash drives, notebook PC's, text messages) or the use of the Internet to transport personally identifiable student or instructor information from an OTC should follow strict institutional information security policies. The use of encryption software to protect sensitive electronic data is generally considered a good practice.

3. Do not send personally identifiable student information (PII) in an e-mail. If there is a need to transfer student PII, please contact ODHE staff for direction on how to submit this data.

4. Set your internet browser to delete all cache. When web queries return data onto your browser, the information is stored in your cache (Temporary Internet Files on Internet Explorer). There are settings that will delete the cache when the browser closes, thereby eliminating the possibility of sensitive data being stored on your C: drive. On Internet Explorer, select Tools <> Internet Options <> Advanced <> Scroll to bottom under Security and check "Empty Temporary Internet Files folder when browser is closed."

5. Log out of the HEI system immediately when your work is complete.

6. Change passwords to HEI accounts regularly. **Sharing of HEI web accounts and passwords is prohibited**. Change passwords frequently, as determined by your Attestor.

7. Avoid faxing personally identifiable information. Communicate information via a telephone call directly to Ohio Department of Higher Education staff if possible.

8. Please contact ODHE staff immediately if you have reason to believe that HEI data has been lost, stolen or compromised in any way. Of particular importance is any data from the HEI system which personally identifies students, faculty, or staff. Also contact ODHE if you believe your password has been compromised, or if you need a new password.

CORE DATA AREAS

The data sets stored within the HEI/OTC database are:

- **PROGRAM APPROVAL DATA** – This data consist of technical programs approved for OTC subsidy, Perkins federal subsidy, and Perkins federal reports. **PROGRAM DATA** – This data consist of a broad range of programs with clock hours that might range from a few hours to 1800 hours or more. These programs might culminate in a credential designated as technical.
- **ENROLLMENT DATA** – This data consist of student personally identifiable information (PII) that includes a personal identifier, race, gender, socio-economic status, special population status, test scores, and credential status.

DATA SUBMISSION "INPUTS" and "OUTPUTS" CALENDAR

Based on the data reported to the HEI/OTC database, the ODHE generates data elements specifically for program reports and subsidy funding.

The data submission inputs and outputs calendar operates on a fiscal year (beginning July 1 and ending June 30), allowing institutions to submit all of their Program and enrollment data within a specified timeframe. This allows for consistency in data reporting across institutions. Moreover, it allows ODHE to take a "snapshot" for reporting needs like the Carl D. Perkins' (Perkins) US Department of Education's Consolidated Annual Report (CAR) and for state and federal subsidy allocations.

DATA SUBMISSION DEADLINE **(For a current fiscal year calendar please go to https://www.ohiohighered.org/node/278)**

DATE	EXPLANATION
SEPTEMBER 1	***FOR PERKINS REPORT:*** Final day to submit enrollment and Program data for the previous Fiscal Year (July 1 – June 30) into the HEI system for all OTC students and Programs (*EXAMPLE: Programs that began on July 1 and ended before or on June 30 and students that are Completers and Leavers would be submitted into the system, as well as any available information on students that were employed, enlisted in the military, in an apprenticeship program, and/or received a credential [e.g., certificate, certification, or license] within the July 1—June 30, timeframe*). ***FOR CENTER FOR TRAINING EXCELLENCE (CTX) REPORT:*** Beginning in 2019, the final day to submit CTX information into the data system for review by ODHE.
OCTOBER 31	***FOR PERKINS REPORT:*** Final day to submit any additional information for the previous Fiscal Year Completer or Leaver students that received a credential [e.g., certificate, certification, or license], were employed, enlisted in the military, and/or in an apprenticeship program.
FEBRUARY 1	***OTC STATE SUBSIDY CALCULATIONS:*** Final day to submit employment/placement and credential data in the system for students that completed programs in the previous fiscal year (EXAMPLE: *information on students that were employed, enlisted in the military, in an apprenticeship program, and/or received a credential at least 6 months after completion of their program.*

DATA SYSTEM OUTPUTS

DATE	EXPLANATION
JULY 1	Current fiscal year Perkins subsidy allocations available through the CCIP system for funding drawdowns.
NOVEMBER 1	Perkins Consolidated Annual Report (CAR) Snapshot (uses two year lag* employment/placement data and previous fiscal year Completer, Leaver, and credential data available at the time of snapshot).
DECEMBER 1	Current Year Perkins Consolidated Annual Reports available in the system and online.
MARCH	OTC subsidy allocations projections available for future fiscal year planning purposes (three year average).
APRIL	Perkins subsidy allocations projections available for future fiscal year planning purposes. (Data is contingent upon ODE fiscal office

	and USDOE/OCTAE providing allocation amount numbers by March 15).
JUNE 1	Perkins allocations posted in CCIP.

***Two-Year Lag Data** – Specific to the Perkins report's Performance Measure 4A1—Placement, the data used for the CAR report is from the previous fiscal year which is a one-year lag; however, 4A1 uses data two years behind the current fiscal year. For example, FY 2018 CAR data is used on each measure except 4A1 which would use FY 2017. This would be true for FY 2019 CAR data, but 4A1 would use FY 2018, etc.

About the Calendar

On **September 1**, OTCs have one opportunity to submit Program and Enrollment information (Completer and Leaver) in to the system. Also during this time, institutions are strongly encouraged to submit any available credential (third-party industry recognized certifications, state licenses, and any other relevant technical assessment/credential) information and employment/placement information for students that completed or left in **the previous fiscal year**.

On **October 31**, institutions have a **FINAL OPPORTUNITY FOR PERKINS REPORTING** to submit any additional credential (third-party industry recognized certifications, state licenses, and any other relevant technical assessment/credential) information and employment/placement information for students that completed or left in **the previous fiscal year**.

On **November 1**, a "snapshot" is taken of the data submitted by OTCs into the HEI system **FOR PERKINS REPORTING**. This will include the additional credential and employment information provided by institutions at the October 31 deadline.

On **February 1**, institutions have a **FINAL OPPORTUNITY FOR STATE SUBSIDY** to submit any additional credential (third-party industry recognized certifications, state licenses, and any other relevant technical assessment/credential) information and employment/placement information for students that completed or left in **the previous fiscal year**.

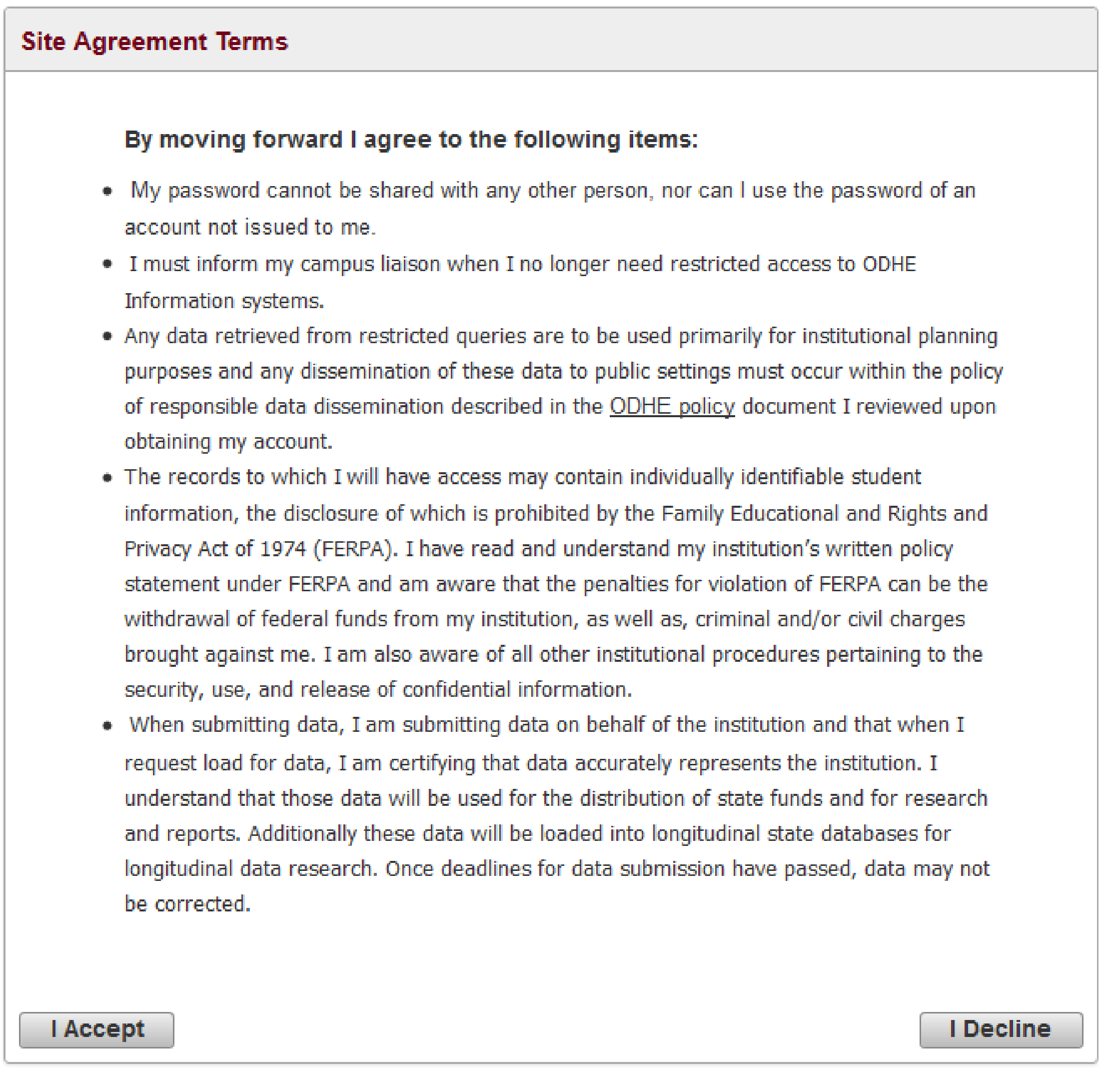
SECTION 2: DATA SYSTEM USER'S GUIDE

Overview of Section

The Data System Functionality section has been specifically written for data system users at the OTCs and provides a detailed description of the database's functions. It also includes comprehensive step-by-step procedures on how to perform many common functions as well as definitions for many of the terms used to define actions. The information contained in this manual is written for district level users.

Terms of Engagement

Before logging into the database, the user must agree to terms and conditions for accessing the site. The below page is shown to all users every time they attempt to log into the system.



Site Agreement Terms

By moving forward I agree to the following items:

- My password cannot be shared with any other person, nor can I use the password of an account not issued to me.
- I must inform my campus liaison when I no longer need restricted access to ODHE Information systems.
- Any data retrieved from restricted queries are to be used primarily for institutional planning purposes and any dissemination of these data to public settings must occur within the policy of responsible data dissemination described in the ODHE policy document I reviewed upon obtaining my account.
- The records to which I will have access may contain individually identifiable student information, the disclosure of which is prohibited by the Family Educational and Rights and Privacy Act of 1974 (FERPA). I have read and understand my institution's written policy statement under FERPA and am aware that the penalties for violation of FERPA can be the withdrawal of federal funds from my institution, as well as, criminal and/or civil charges brought against me. I am also aware of all other institutional procedures pertaining to the security, use, and release of confidential information.
- When submitting data, I am submitting data on behalf of the institution and that when I request load for data, I am certifying that data accurately represents the institution. I understand that those data will be used for the distribution of state funds and for research and reports. Additionally these data will be loaded into longitudinal state databases for longitudinal data research. Once deadlines for data submission have passed, data may not be corrected.

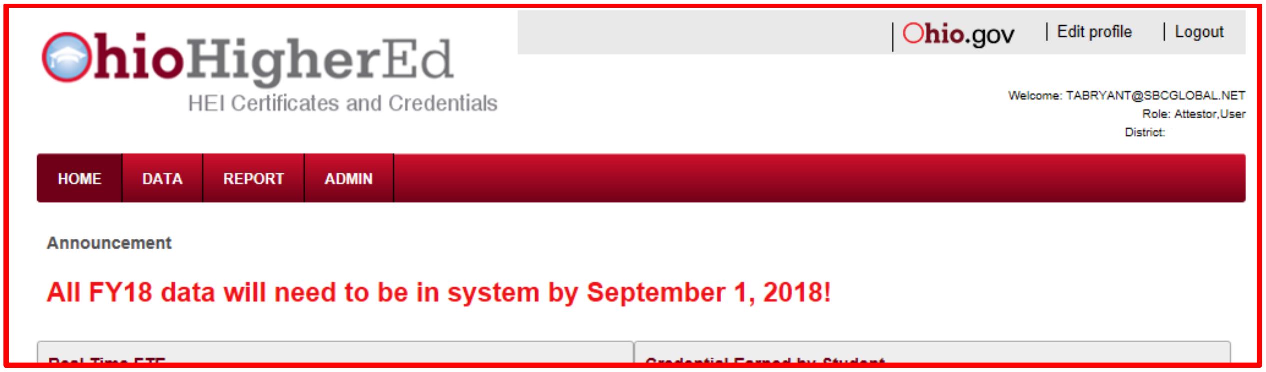
I Accept | I Decline

Click the "I Accept" button to complete the login process. Clicking the "I decline" button will return the user to the log in page.

Home Section

Once a User, Read Only User or Attestor have successfully logged into the OTC database, the "Home" page is displayed. This page provides users with access to the various sections of the database system. These sections are the following:

- Home
- Data
- Report
- Admin



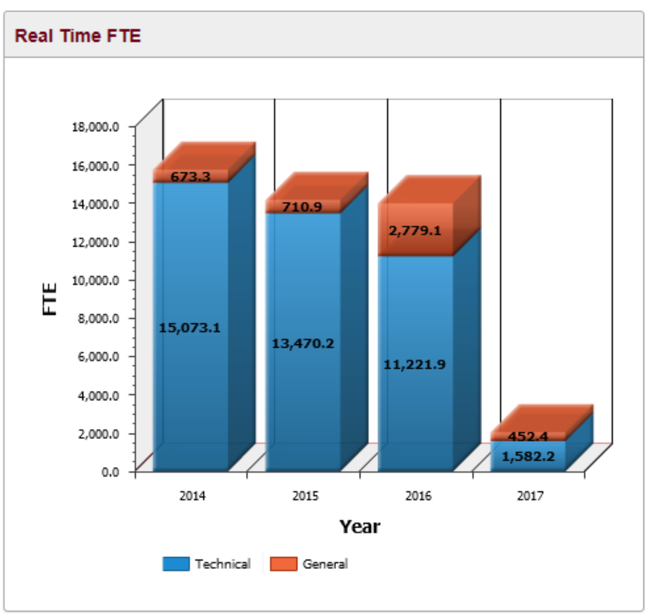
As you can see, the database system's sections are displayed at the top of the page. Clicking on one of these tabs will take you directly to that page.

The "Home" page also shows the following graphs:

- Real Time Full Time Equivalent (FTE)
- Credential Earned by Student

Real Time FTE Graph

The Real Time FTE graph displays the Full Time Equivalent (FTE) of Program hours for all students per fiscal year. The graph also separates data by Technical or General programs.

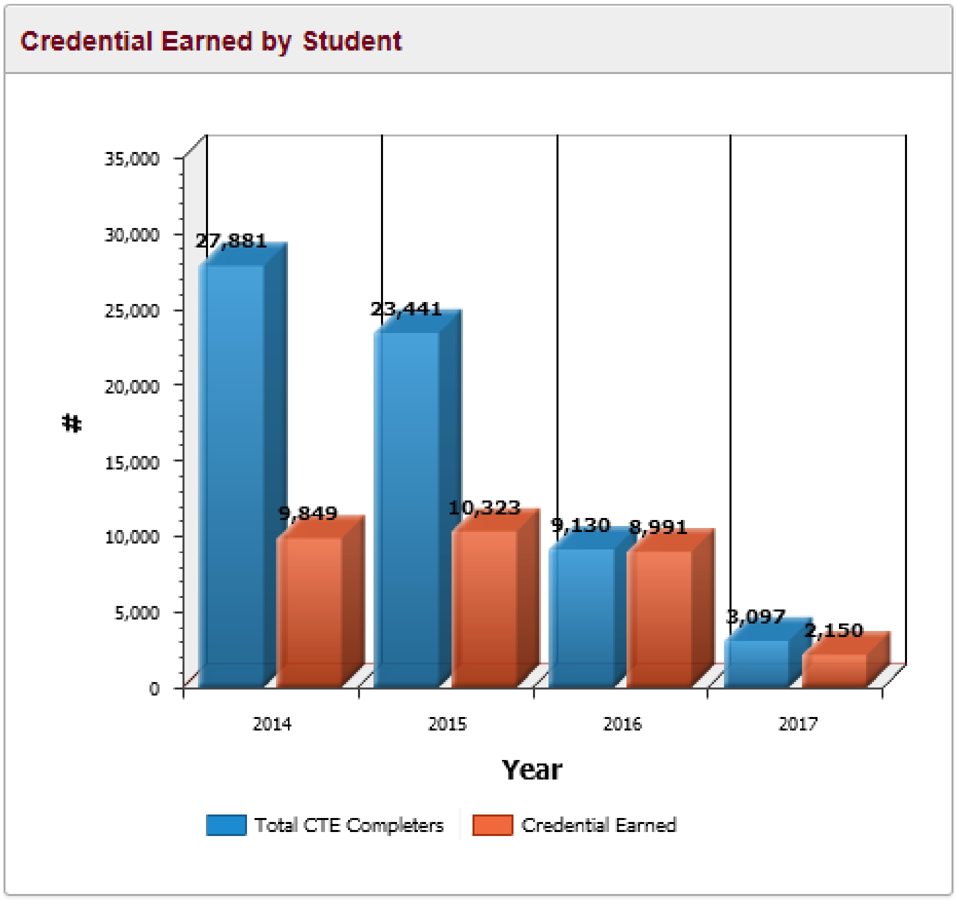


This bar chart lists the FTE count in hours per district. It also provides four fiscal years of data. The years are dynamically generated.

Credential Earned by Student Graph

The Credential Earned by Student graph displays the trend of number of Program completer students versus number of students who attained at least one credential. This chart provides the following information:

- Total number of career technical education completers
- Total number of students that have earned at least one credential



User Roles

The OTC/HEI database provides users with access to data and functionality based on user roles. The application restricts district level users from viewing or inputting data for other institutions. Users can only submit information for their specific district. As previously mentioned, the user roles have been migrated to the HEI-Auth centralized authentication system. Some roles have been eliminated or consolidated.

The following sections describe in detail each role and the functionality that is available to each role. The roles discussed include:

- OTC Attestor (HEI-Auth Role: Attestor)
- OTC User (HEI-Auth Role: OTC User)
- OTC Read Only User (HEI-Auth Role: OTC Read Only User)

Attestor

The Attestor enters information pertaining to their district. Some of the activities the Attestor can perform include:

- Adding and editing data
- Viewing and downloading reports
- Adding, editing and deactivating instructors
- Attesting programs for Funded and Not Funded

The following table contains a complete list of functionality per tab that is available to the Attestor role.

Tab	Available Functions
HOME	View announcement and disclaimer information View the following detailed data graphs per district: ➢ Real Time FTE ➢ Credentials Earned by Student
DATA	Add, view, edit and delete Programs Copy Programs to own district Add, view, edit and delete enrollments Add, view, edit and delete detailed information about individual instructors Search for existing students View detailed information about students Attest Programs for Funded and Not Funded
REPORT	Download the following reports ➢ FTE Trend Report by CTPD, district or state for a single fiscal year or a range ➢ Approved Programs ➢ CIP Code Report ➢ Certificate Pass/Fail ➢ Incorrect Status Report ➢ Overall Report Detailed FTE Report

Tab	Available Functions
ADMIN	Instructor management which includes adding, editing, viewing and deleting instructors.

OTC User (HEI-Authorized Role: OTC Edit)

The User role has the ability to enter data pertaining to their district that includes:

- Adding and deleting data
- Viewing and downloading limited reports
- Creating ad hoc reports

The following table contains a complete list of functionality that is available to the district user role.

Tab	Available Functions
HOME	View announcement and disclaimer information View the following detailed data graphs per district: ➢ Real Time FTE ➢ Credentials Earned by Student
DATA	Add, edit and view Programs Add and upload enrollment data View available instructors Search for existing students View detailed information about students Add, edit and view programs
REPORT	Download the following reports ➢ FTE Trend Report by district for a single fiscal year or a range ➢ Approved Programs ➢ CIP Code Report ➢ Certificate Pass/Fail ➢ Incorrect Status Report ➢ Overall Report ➢ Detailed FTE Report

OTC Read Only (HEI-Authorized Role: OTC Read Only User)
The read only user role has read-only access to:

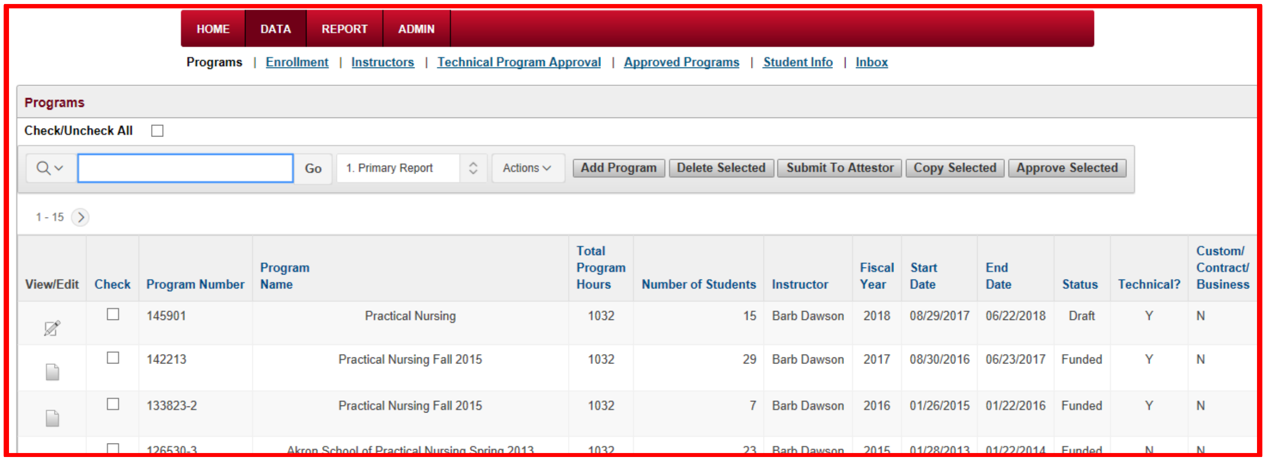
- All district level data entry screens

Viewing and downloading limited reports the following table contains a complete list of functionality per tab that is available to the district general user role.

Tab	Available Functions
HOME	View announcement and disclaimer information View the following detailed data graphs per district: ➢ Real Time FTE ➢ Credentials Earned by Student
DATA	View: ➢ Programs ➢ Enrollment ➢ Instructors ➢ Programs Search for existing students View detailed information about students
REPORT	Download the following reports ➢ FTE Trend Report by district for a single fiscal year or a range ➢ Approved Programs ➢ CIP Code Report ➢ Certificate Pass/Fail ➢ Incorrect Status Report ➢ Overall Report ➢ Detailed FTE Report

Data Section

The "DATA" section is where users perform tasks involving district records. This includes entering program information, student enrollments, names of instructors, and submitting programs to be approved as technical for funding. This area also allows users to view program and enrollment information as well as selecting Approved Technical Programs to be offered within a fiscal year.

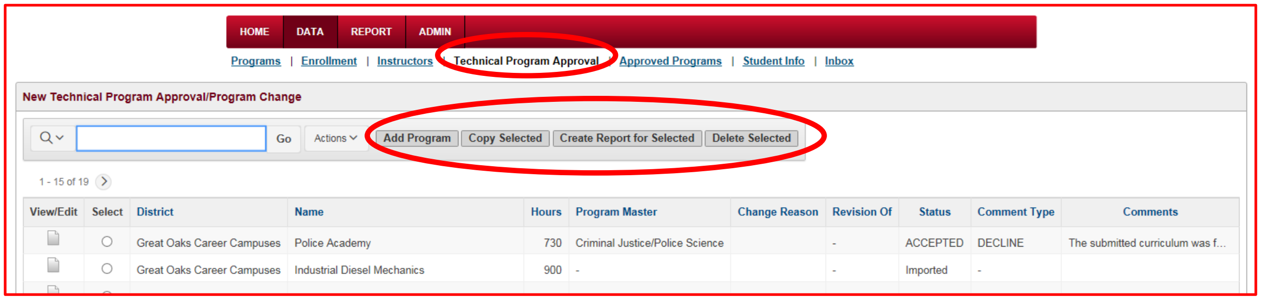


From the DATA tab, some of the activities users can perform include:

- View and search Program information
- View and search Enrollments information
- Search and view information about available instructors
- Add, edit, copy, delete and attest Programs that are approved as technical or general
- Add, editor delete enrollments
- View district's Approved Program list
- Search for and view information about available instructors who can teach Programs
- Add, edit, copy, delete and attest Technical Program Approval

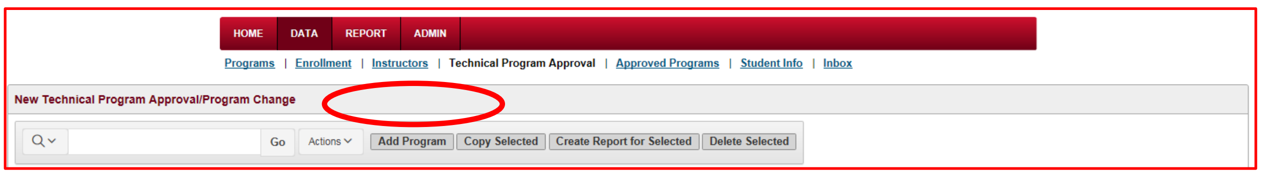
Not all user roles can perform every function listed above.

Technical Program Approval
Under the Data tab, the Technical Program Approval link will open up the New Technical Program Approval/Program Change page. Here, users will be able to add and view programs that are associated with their institution. The screenshot below provides an example of this page.



Note: Every OTC will have a list of approved programs, some programs are newly created and other program are grandfathered/*imported* into the system. The grandfathered/*imported* programs will not contain complete program information

Creating a New Program
Once on the Technical Program Approval page Attestors and Users have the ability to create new programs. Clicking the Add Program button opens the Program Wizard.

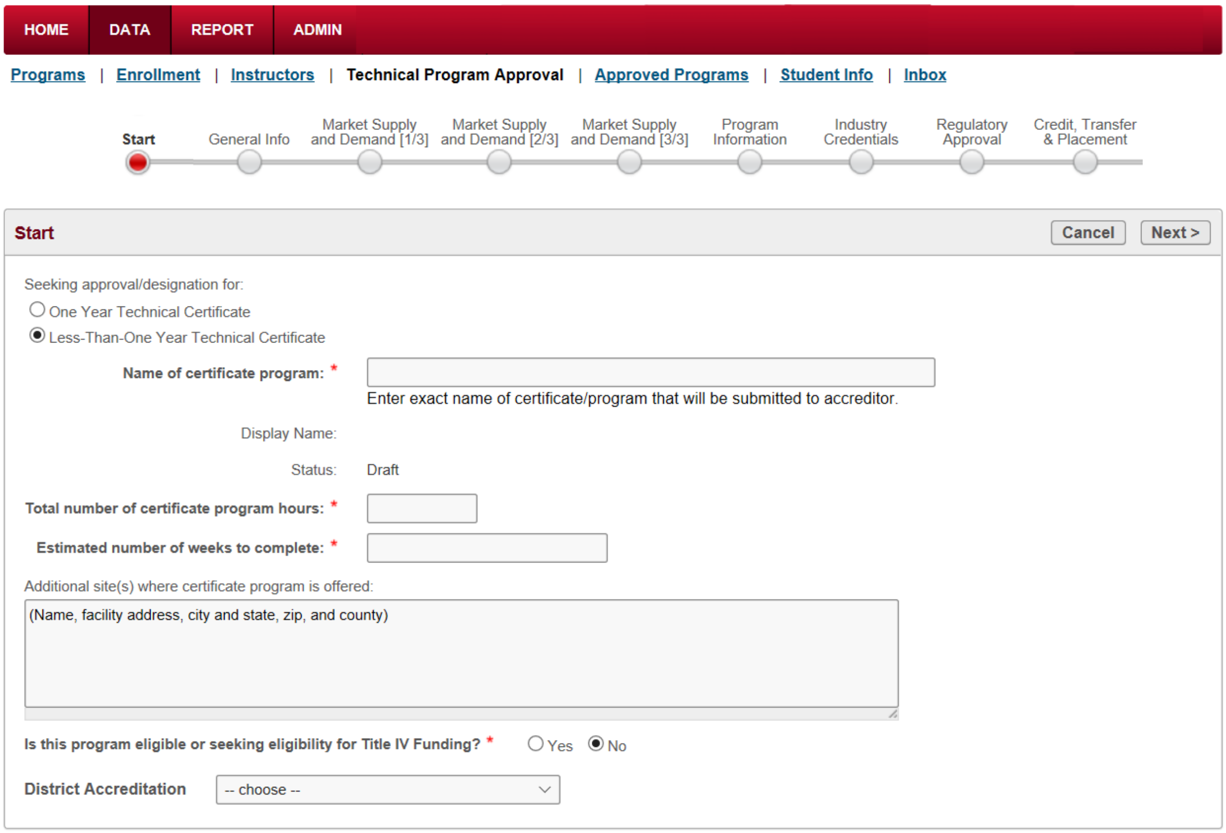


The Program Wizard
Once a user selects "Add Program" they are taken to the Program Wizard. The Program Wizard is designed to guide the user through a nine-page application for technical program approval. Each page of the wizard allows the user to enter information and attach pertinent files to the application. The program wizard also contains navigation buttons allowing the user to either cancel or move to the next or previous page as necessary. The station map near the top of the page allows a user to go directly to a specific page of the application.

Additionally, if you navigate away from a page, the Wizard will automatically save any previously entered information or attached files. This means a user does not have to complete the entire application in one sitting, allowing one to return at a more convenient time to complete the process.

Navigation Steps for the Program Wizard

At the top of the Program Wizard screen there is a horizontal list of steps marking the "Start" to the "End" of the application. As you move from one step to the next, a small clear button under each step will turn red. This is to identify a user's place in the progression of completing the application.



<u>**PAGE #1—Start**</u>

The Start page provides several questions, with options for selection which include text boxes and radio buttons to enter the response to the questions. If a red asterisk is by a box or button, **you are required to** fill-in the box or select a choice in order to continue to the next page.

Below is an outline of the questions and the selections to provide the respective response, along with additional information for this page.

A. <u>Seeking approval/designation for:</u>

   Here institutions have two options to choose from:

   1. One Year Technical Certificate

      Certificates awarded by an OTC for the completion of an organized program of study in at least 900 clock hours, with the majority of the Program work completed in a prescribed technical area and designed for an occupation or specific employment opportunities.

   2. Less-Than-One Year Technical Certificate

Certificates awarded by an OTC for the completion of an organized program of study in less than 900 clock hours that are designed for an occupation or specific employment opportunities.

General Certificates (Reported to ODHE, do not require ODHE approval or designation)
General Certificates are programs of general study, not technical in nature and does not lead to a third-party credential.

B. Name of certificate program:
In this window (small text box), the User must ***"Enter the exact name of the certificate that will be submitted to accreditor."***
Status: This will read as draft until you complete the application. Status will change once the program is "Attested"

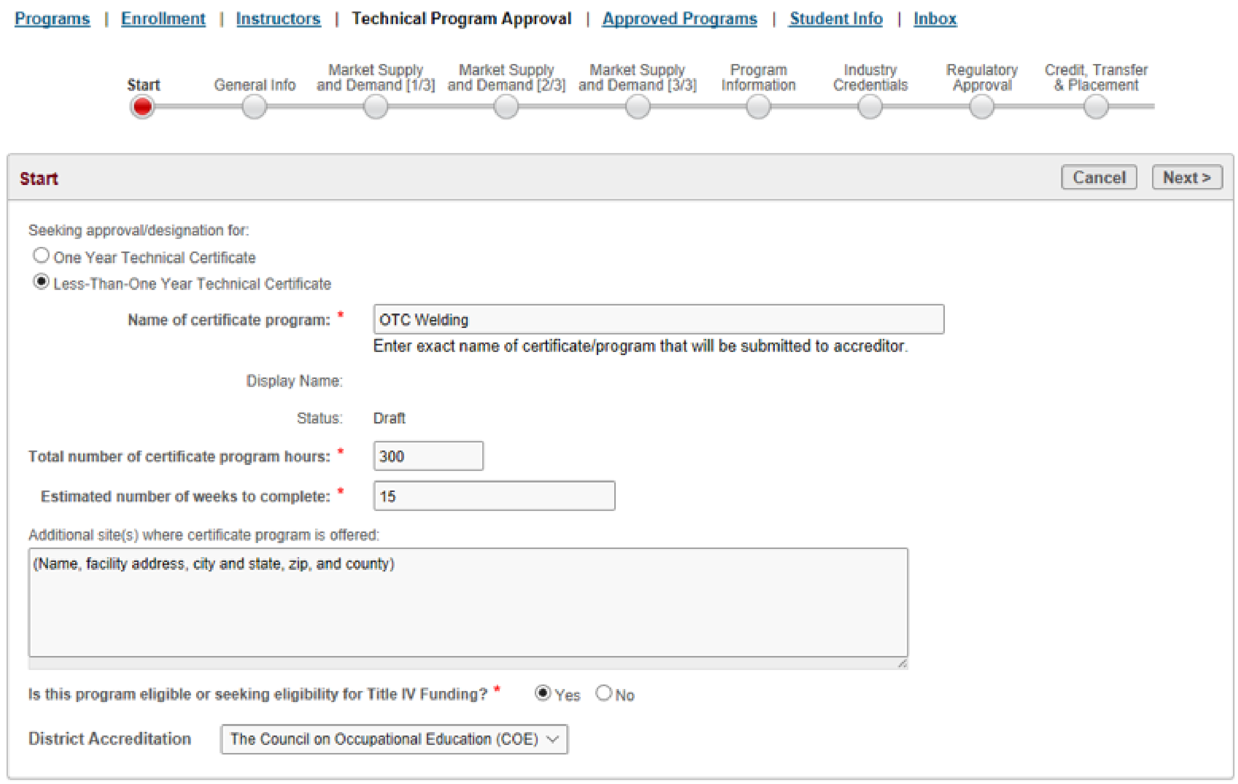
C. Total number of certificate program hours:
The User must put in the exact number of program hours. This is inclusive of labs or any other outside experience that you plan on counting within this program.

D. Estimated number of weeks to complete:
Put in the estimated number of weeks (i.e., 10, 20, etc.) it will take to complete the program. Although we ask for an estimate, please try to be as exact as possible.

E. Additional institution site(s) that are part of your institution where certificate program is offered:
In the provided text box, please identify any additional sites for your institution by including:
- Facility's Full Name; Address; City; State; Zip Code; County

F. Is this program eligible or seeking eligibility for Title IV Funding?:
Either select "Yes" or "No"

G. District Accreditation:
Please choose an accreditor if your institution is accredited.


Programs | Enrollment | Instructors | Technical Program Approval | Approved Programs | Student Info | Inbox

Start | General Info | Market Supply and Demand [1/3] | Market Supply and Demand [2/3] | Market Supply and Demand [3/3] | Program Information | Industry Credentials | Regulatory Approval | Credit, Transfer & Placement

Start Cancel Next >

Seeking approval/designation for:

○ One Year Technical Certificate

◉ Less-Than-One Year Technical Certificate

Name of certificate program: * OTC Welding

Enter exact name of certificate/program that will be submitted to accreditor.

Display Name:

Status: Draft

Total number of certificate program hours: * 300

Estimated number of weeks to complete: * 15

Additional site(s) where certificate program is offered:

(Name, facility address, city and state, zip, and county)

Is this program eligible or seeking eligibility for Title IV Funding? * ◉ Yes ○ No

District Accreditation: The Council on Occupational Education (COE)

<u>PAGE #2—General Info</u>

When you complete page 1 and transition to the "General Info" page a small text box will be positioned under the horizontal list of application steps. The box will display "Technical Certificate:" with the name of the program and the word ***Draft*** in parenthesis behind the program's title.

Again, this will read as "draft" until you complete the application. Status will change once the program is "Attested"

The first question on the page asks:

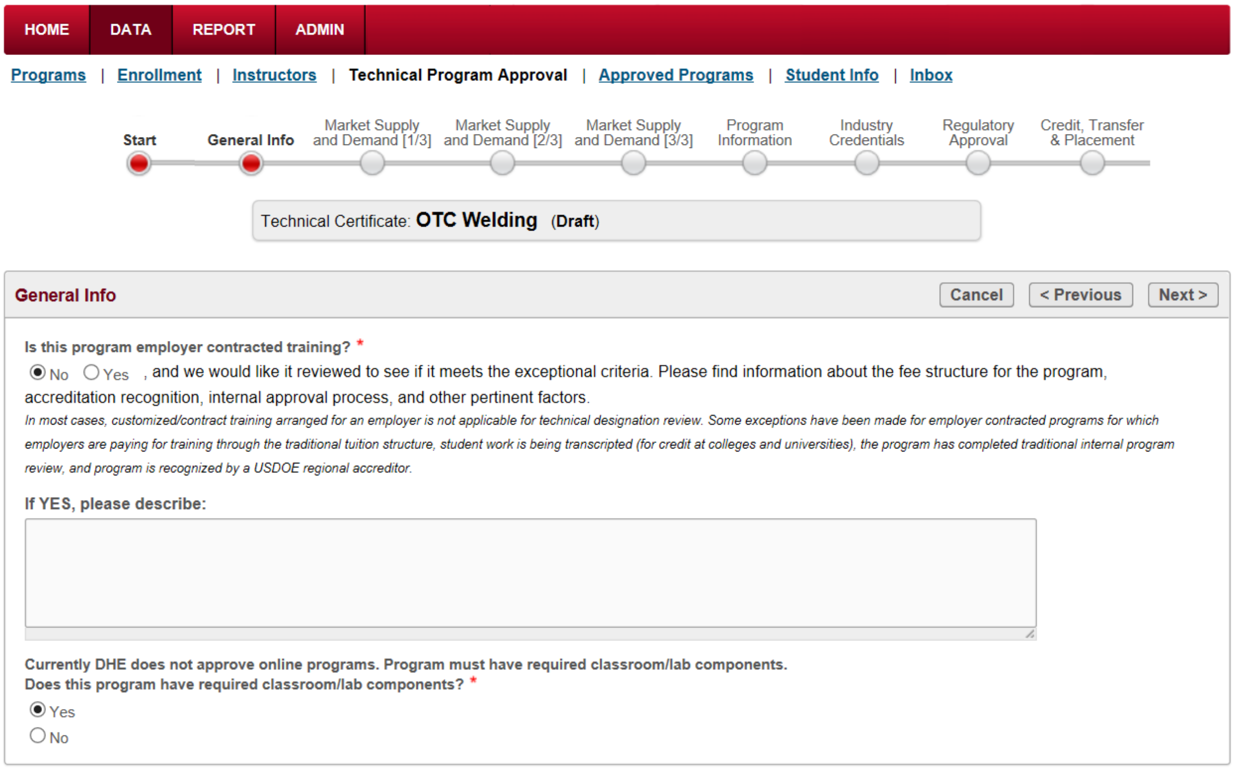
A. <u>Is this program employer contracted training?</u>

   There is a radio button that allows the User to select Yes or No:

   1. **If NO**, move to the question on this page. You do not have to add a response in the text box.
   2. **If YES, please describe:** (in provided text box)
      In most cases, customized/contract training arranged for an employer is not applicable for technical designation review. Some exceptions have been made for employer contracted programs for which employers are paying for training through the traditional tuition structure, course work is being transcripted (for credit at colleges and universities), the program has completed traditional internal program review, and program is recognized by a USDOE regional accreditor.

Institutions should submit fee structure information, internal approval process, accreditation recognition, and other pertinent program factors (i.e. program can be added to student's transcript).

**A customized/contract training program will be reviewed by the ODHE certificate and credential committee.



The next section states that ODHE will not approve online programs for technical centers and lists the following question:

B. <u>Does this program have required classroom/lab components?</u>
   1. Please enter **YES** for a course that has some or all components held in classroom or a lab.
   2. **NO** should not be selected.

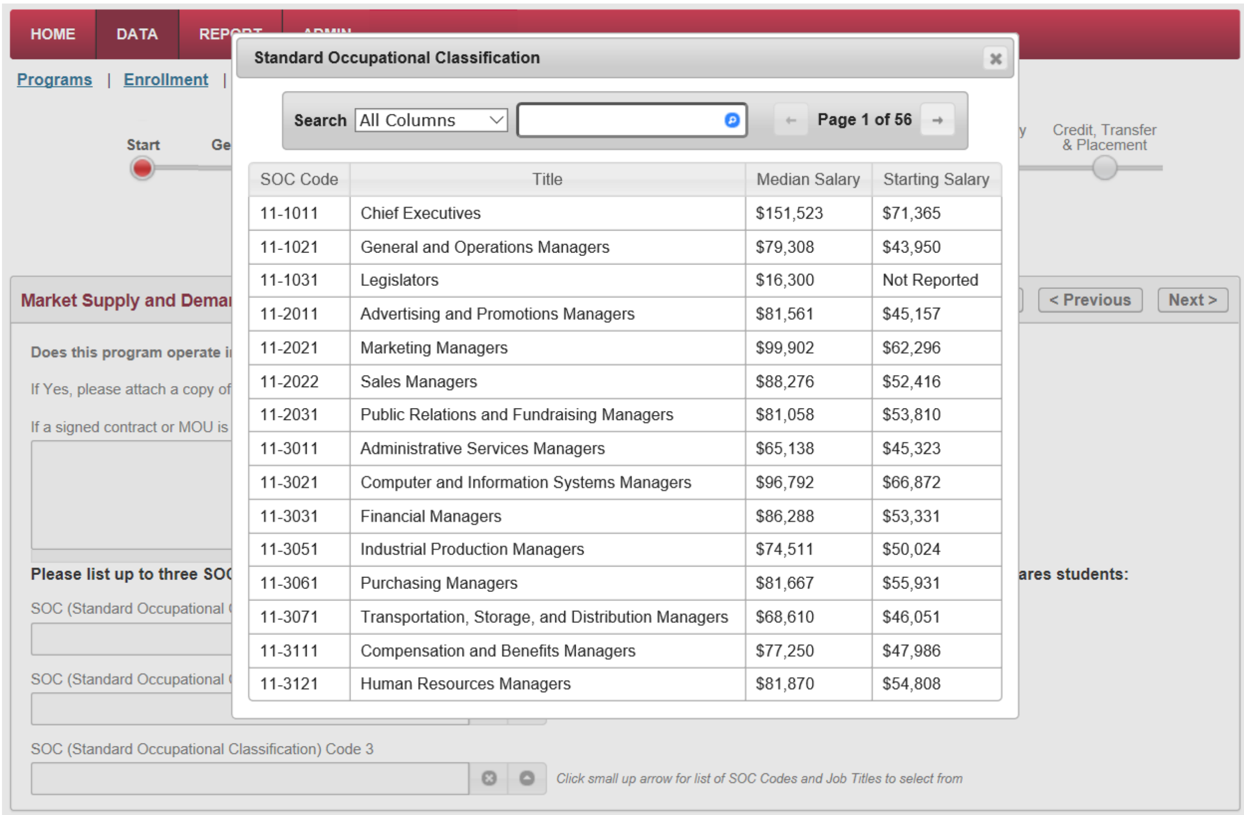
**Please note: Currently, ODHE does not approve online programs for technical centers.

<u>Page #3—Market Supply and Demand [1/3]:</u>
This page is designed to learn more about how the program operates. There are specific questions to operations as well as identifying the proper Standard Occupational Classification (SOC) codes associated with the program.

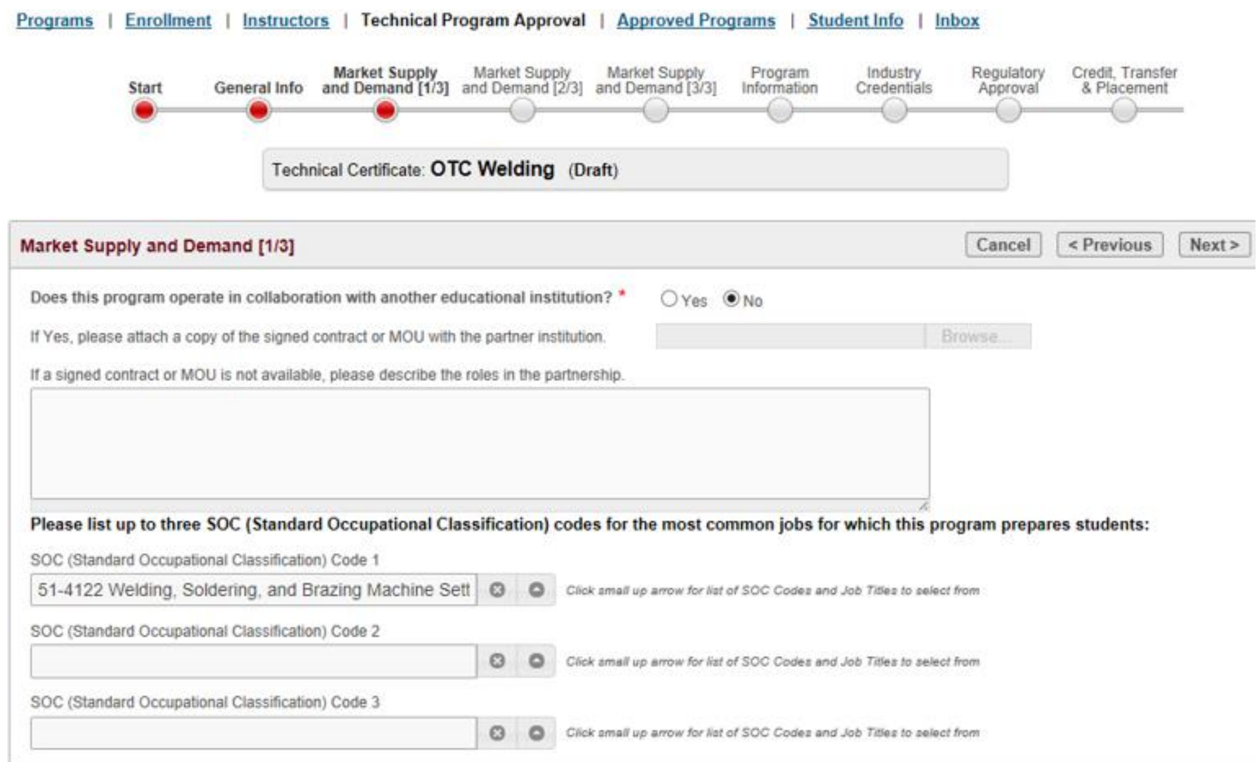
The first question on this page asks:

A. <u>Does this program operate in collaboration with another educational institution?</u>
   1. **If YES**, then the institution has options on how to provide the proper documentation. There is a "Browse" button that allows the user to upload a file attachment into the system.
   2. **If NO**, then move to the SOC (Standard Occupational Classification) Code 1 text box. You must enter at least one code in the system that aligns with the program. The system provides the ability to enter 3 SOC codes. Also, there is a search function that will assist with locating the SOC codes. You must click on the small box with the "up arrow" icon to

open the list of SOC Codes. Once the SOC code box is open, you can search codes by inserting a term from occupations within the program you are offering. Select the one(s) that best align with the program and hit enter or click on the occupational title to insert the SOC code. (see examples below)



SOC Code	Title	Median Salary	Starting Salary
11-1011	Chief Executives	$151,523	$71,365
11-1021	General and Operations Managers	$79,308	$43,950
11-1031	Legislators	$16,300	Not Reported
11-2011	Advertising and Promotions Managers	$81,561	$45,157
11-2021	Marketing Managers	$99,902	$62,296
11-2022	Sales Managers	$88,276	$52,416
11-2031	Public Relations and Fundraising Managers	$81,058	$53,810
11-3011	Administrative Services Managers	$65,138	$45,323
11-3021	Computer and Information Systems Managers	$96,792	$66,872
11-3031	Financial Managers	$86,288	$53,331
11-3051	Industrial Production Managers	$74,511	$50,024
11-3061	Purchasing Managers	$81,667	$55,931
11-3071	Transportation, Storage, and Distribution Managers	$68,610	$46,051
11-3111	Compensation and Benefits Managers	$77,250	$47,986
11-3121	Human Resources Managers	$81,870	$54,808



*Additional information regarding SOC codes can be found at: https://www.bls.gov/soc/

PAGE #4 — Market Supply and Demand [2/3]:

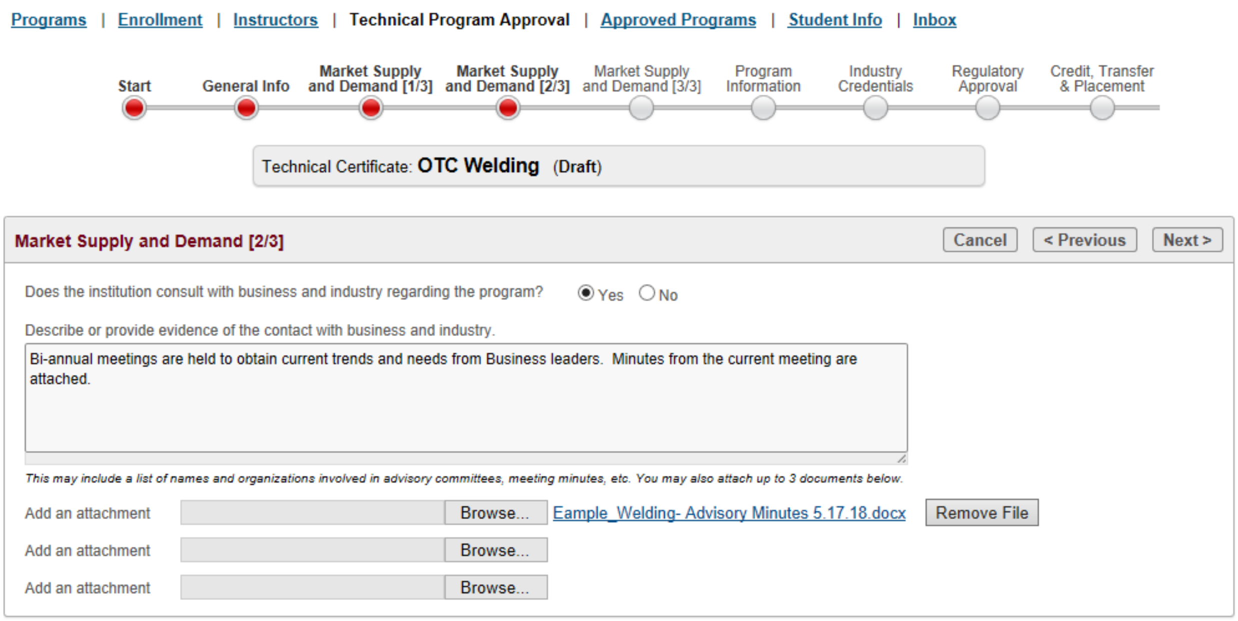
This page is designed to obtain information regarding consultation with Business and Industry. The first question on this page asks:

A. Does the institution consult with business and industry regarding the program?

1. **If YES**, the institution is asked to:

a. Describe and/or provide evidence of the contact with business and industry, in which a text box is provided for the response. Here, the user has the option to provide documents that provide supporting evidence of contact with business and industry. This may include a list of names and organizations involved in advisory committees, meeting minutes, etc. The user will have the option to attach up to 3 documents.

NOTE: Documents can be added by clicking the Browse Button to select file from your system and to upload the file – see below



Note**:** The files saves when you move to the next page. When you review the page will see the uploaded file.

PAGE #5 — Market Supply and Demand [3/3]:

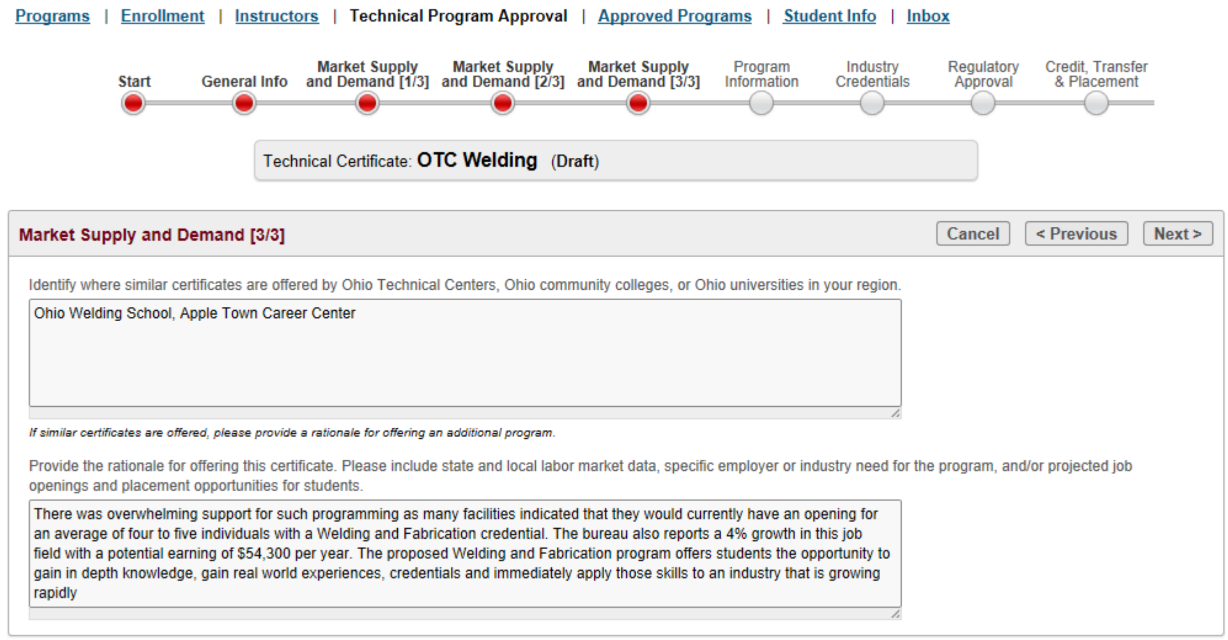
This section is designed to obtain the rationale for requesting the certificate for approval. There are two text boxes provided to enter your responses.

In the first box, institutions must show whether similar certificates are offered by Ohio Technical Centers, Ohio community colleges, or Ohio universities in their respective region.

For the second box, schools must explain why they are offering the certificate (program). Additionally, the institution must include state and local labor market data, specific employer, or industry need for the program, and/or projected job openings and placement opportunities for students.

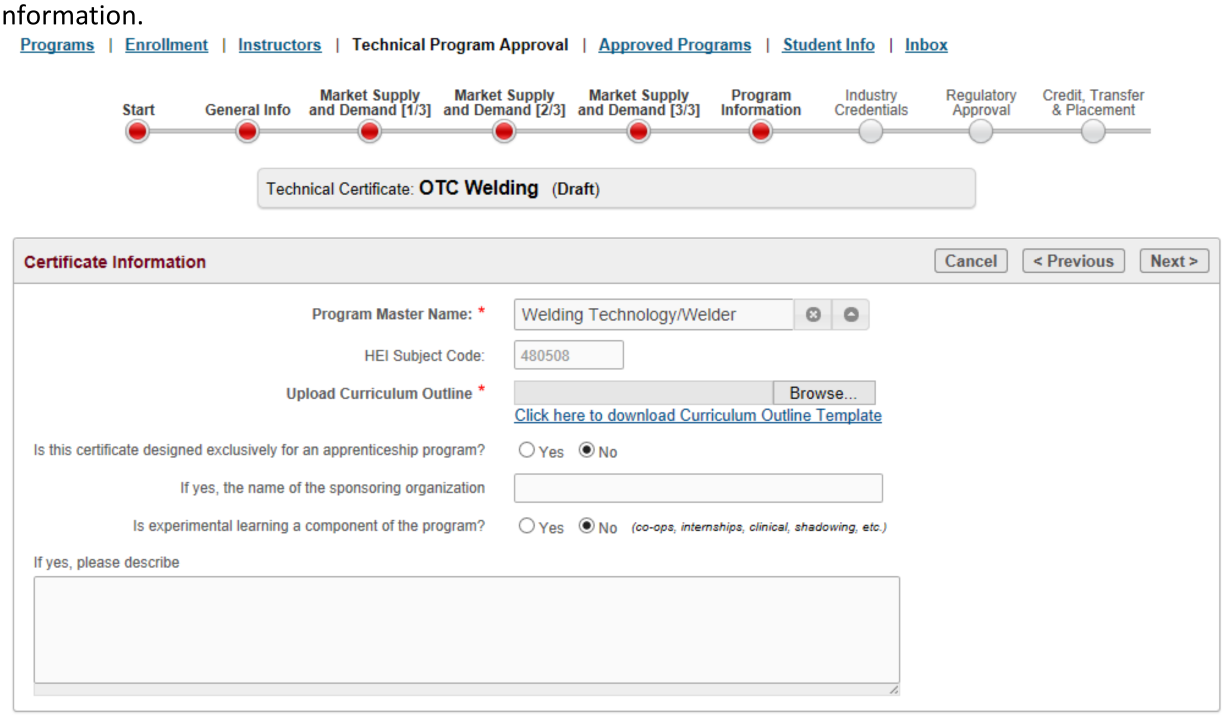
This information can be pulled from:

- Ohio Labor Market Information
  - http://ohiolmi.com/ (Search for current employment statistics)
- Occupation by Education and Wages
  - http://ohiolmi.com/jobs/CareerEdWage.htm
  - http://jfs.ohio.gov/owd/OMJResources/In-DemandOccupations.stm



PAGE #6 — Program Information/Certificate Information:

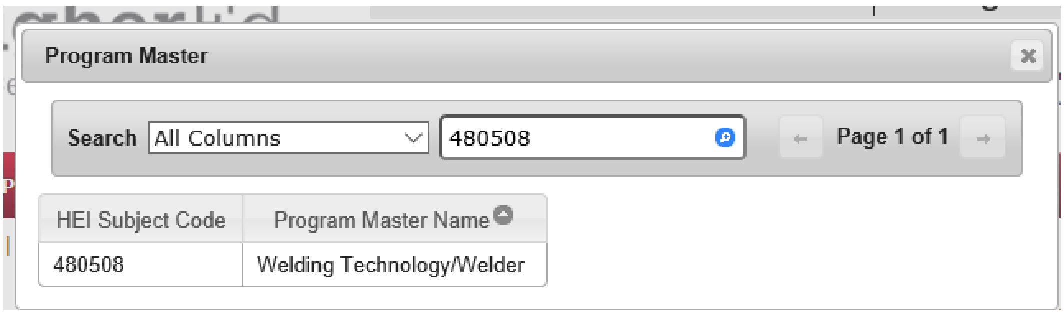
This page is designed to for institutions to identify the Program Master Name and provide curriculum information.



When a User opens this page a small text box with two icons on the side is revealed.

1. Click on the small icon  on the far right. This icon will open a search window.

2. Once this window opens, enter the program CIP Code/HEI Subject Code (no spaces or periods).
3. Click on the search tool which will then populate the respective "Program Master Name".

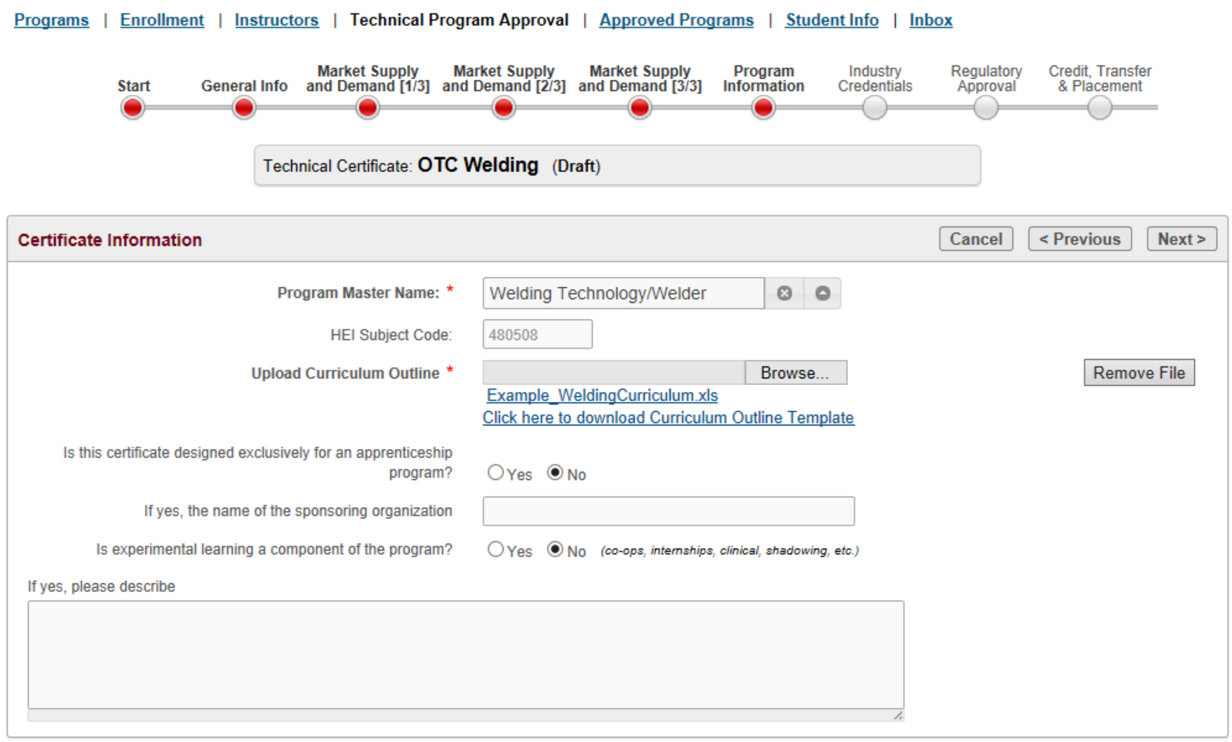


If you have questions regarding program CIP Codes, additional information can be found at the IPEDS CIP Code User Site: https://nces.ed.gov/ipeds/cipcode/Default.aspx?y=55

After the Program Master information is populated, the next step on this page is adding the Curriculum. To upload the Curriculum:

1. Download the "Curriculum Template", enter the program name and list each course with the respective hours, which should be the total hours of the program. Save the completed document in a location on your system for easy access to upload.
2. Click the Browse Button Browse... to select file with the *completed curriculum* from your system and this will allow the file to be uploaded
3. The Title of the uploaded Curriculum appears (the file name you created for the document and saved on your system)

*****Please note the curriculum should contain each course with respective hours within the program.***



Complete Curriculum Template Example:

	A	B	C	D
1	**Institution**	Example Career & Technical Center		
2	**Certificate Program Name:**	Exercise Science		
3	Courses in Certificate Program (name/number)	No. of clock hours or semester credit hours	OTM, TAG or CT2 equivalent course (please check)	Colleges & Universities only: Elective (please note if the course is elective)
4	*Anatomy & Physiology*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
5	*Exercise Phsyiology*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
6	*Exercise & Nutrition*	*40*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
7	*Kinesiology of Human Movement*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
8	*Leadership, Business & Sales/Professional Dev*	*20*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
9	*Exercise Psychology & Lifestyle Coaching*	*32*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
10	*Corrective Exercise Development*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
11	*Exercise & Fitness Assessments*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
12	*Program Design & Advanced Techniques*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
13	*Certification Exam Preparation*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
14	*CPR/AED Certification*	*4*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
15	*First Aid Certification*	*4*	*[OTM, TAG, CT2, none]*	*[Yes or No]*
16	*Special Populations Fitness Prescriptions*	*60*	*[OTM, TAG, CT2, none]*	*[Yes or No]*

The following remaining questions on this page should be answered:

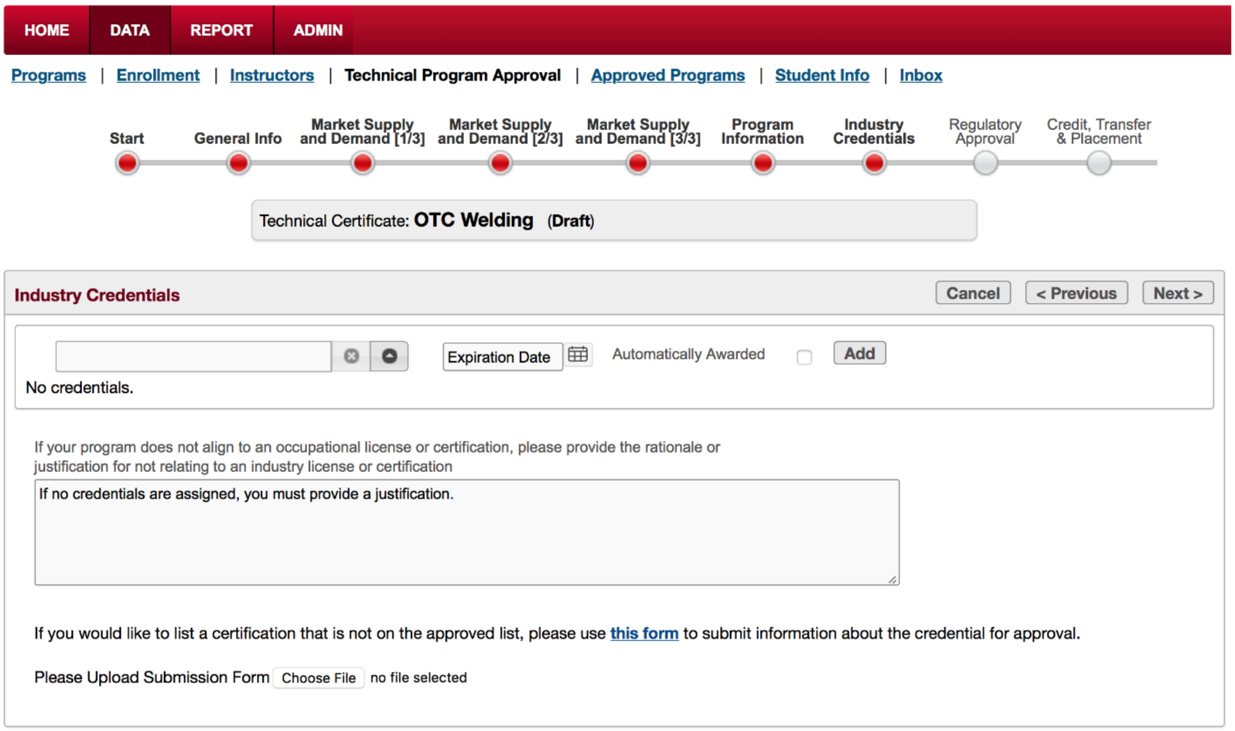
A. Is this certificate designed exclusively for an apprenticeship program?
   1. If No, move to the next question
   2. **If YES**, enter the name of the sponsoring organization in the provided text box.

B. Is experiential learning a component of the program?

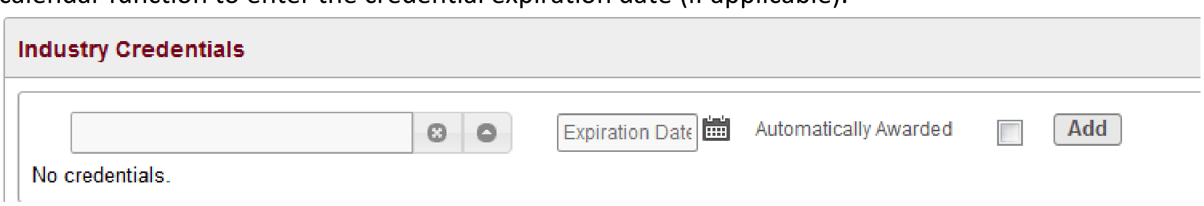
   1. **If No, move to the next page.**
   2. **If YES**, provide an explanation in the provided text box.

PAGE #7—Industry Credentials:

This page is designed to collect information regarding the program(s) Industry Credentials. Most programs provide or align to occupational licenses or certifications.

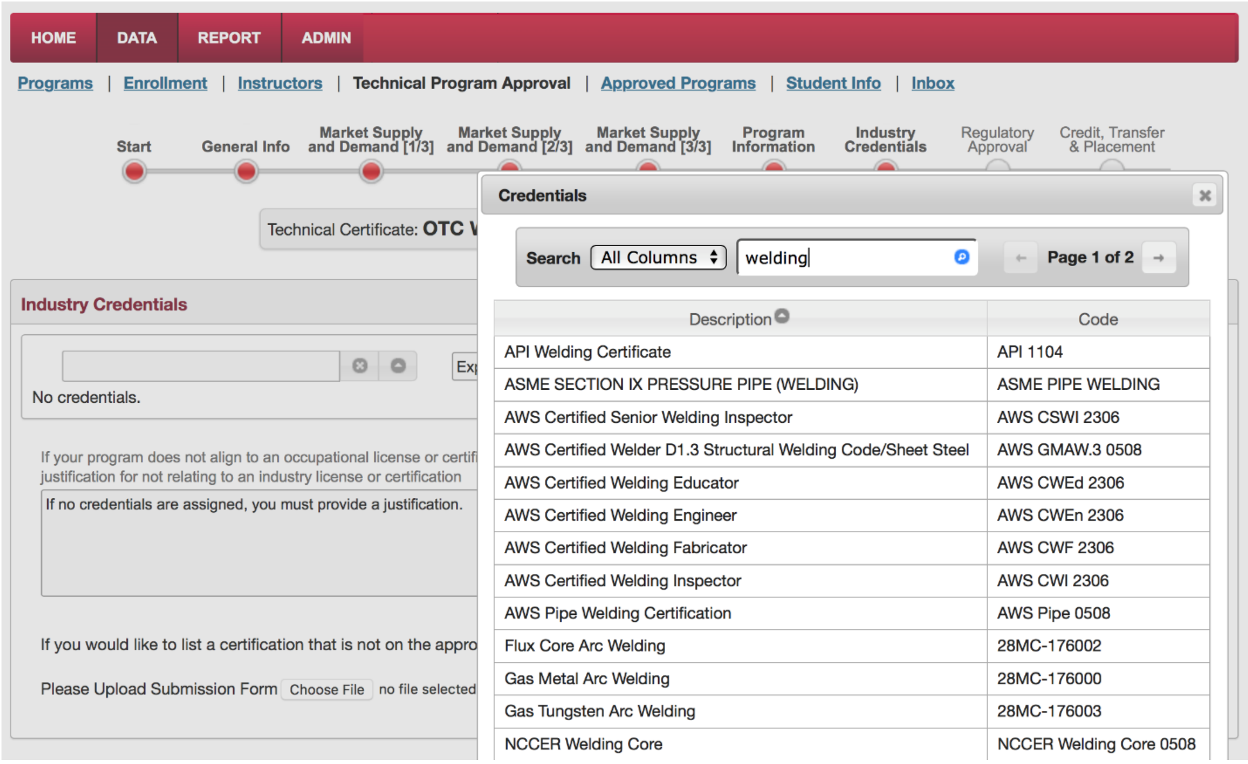


A search function is provided to assist in identifying/selecting the aligning credential(s), along with a calendar function to enter the credential expiration date (if applicable).



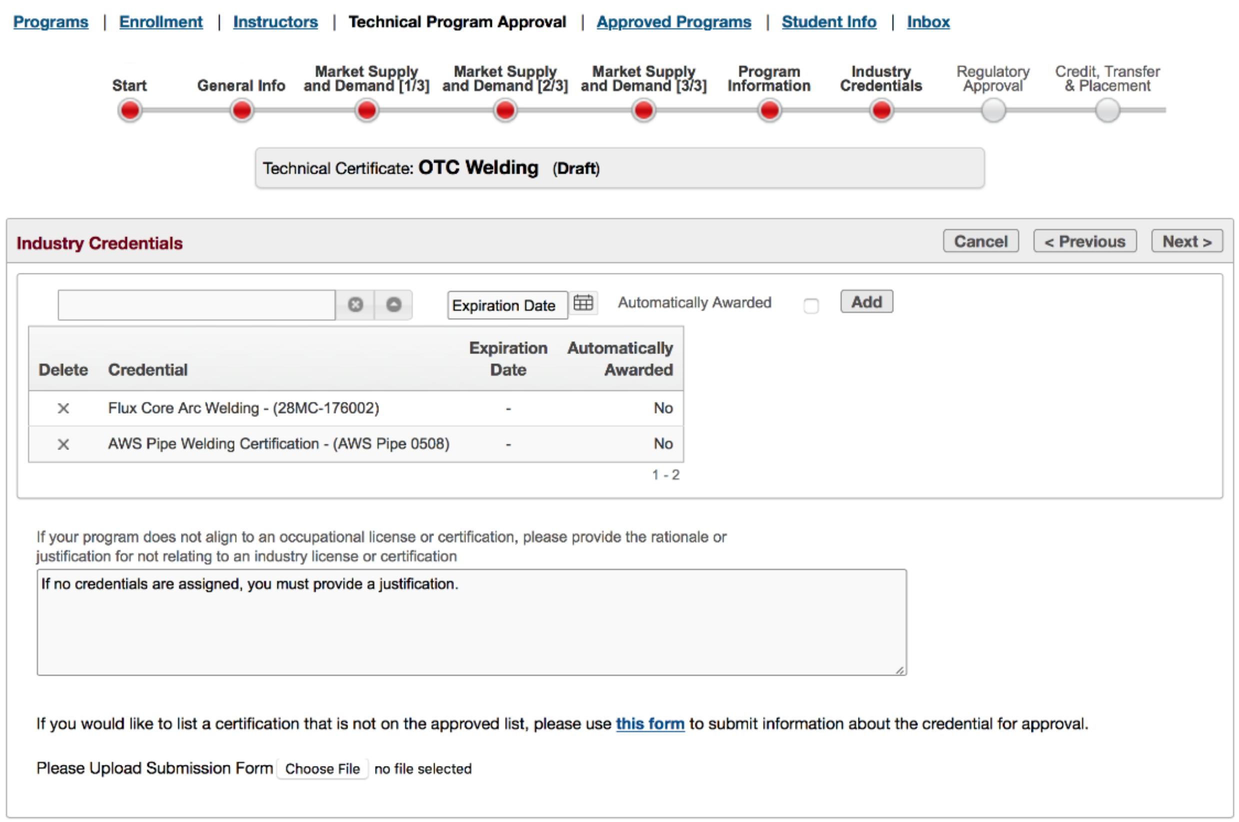
To open the search function follow the steps below:

1. Click on the far right icon . This will allow you to enter terms that align with the respective credential.
2. Click on the search tool after entering information and a list of credentials will populate allowing the credential to be selected. (see below)
3. Hit Enter or click on the respective title to insert Industry Certificate name.
4. Click the "Add" icon to add the credential.
5. Repeat process to enter additional credentials.



If the ***program does not align*** to an occupational license or certification, ***it is required*** to enter the rationale and/or justification for the program not relating to an industry license or certification in the provided text box.

Example of Industry Credentials entered below



<u>PAGE #8 —Regulatory Approval:</u>

This page is provided to obtain approval documentation/information for the respective program's Industry governing body or agency.

The first question on this page asks:

A. <u>Does the governing body for the industry credential or an external regulatory entity (e.g. State Board of Nursing) require approval for program, facilities, curriculum, faculty, student-teacher ratios, or other items?</u>

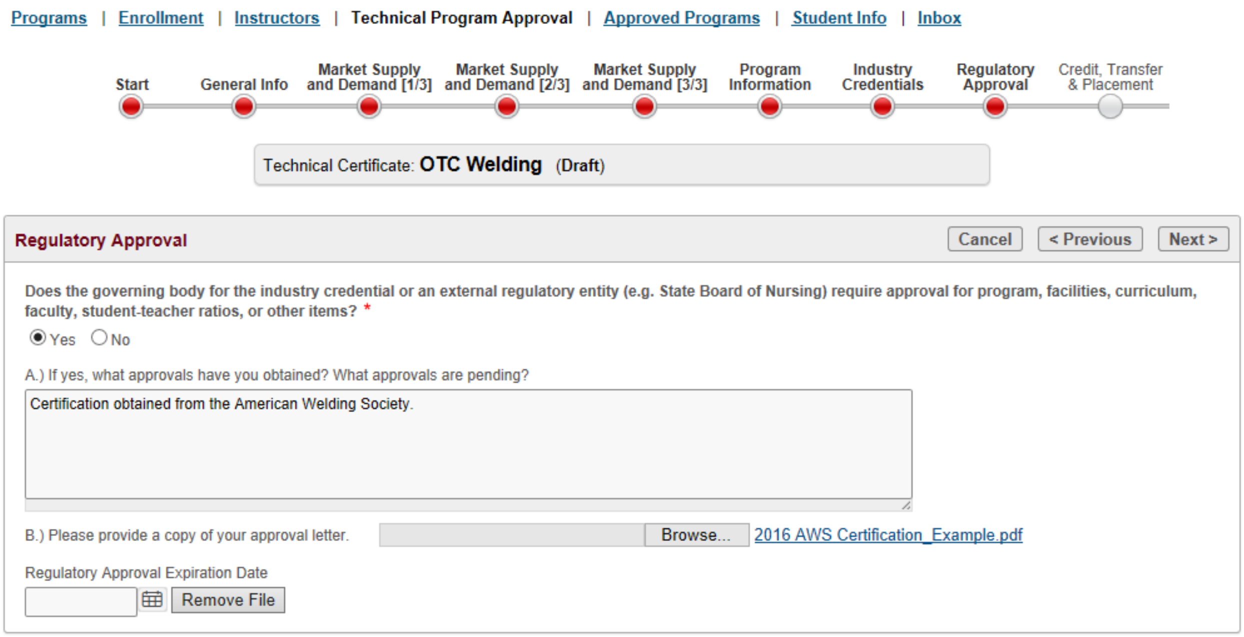
Additional examples of external regulatory approval letters include but not limited to: letters from the Ohio Department of Health, the Ohio State Cosmetology and Barber Board, the Ohio Department of Public Safety (Fire Charter, Emergency Medical Services), the Ohio Peace Officer Training Commission, the American Welding Society (AWS)…

1. **If YES**, the User must enter the approval(s) that have been obtained in the text box provided. If the institution has pending regulatory approvals, that information should be entered in the text box.

Once you have entered the approval(s), a copy of the approval letter should be provided (uploaded).

To attach the approval letter:

Select "Browse" to upload document from your system. Once the file is attached you will see the file name. If you have more than one document, merge the documents to create one file to attach. There is feature to "Remove file" Remove File see Screenshot below, if needed.



<u>PAGE #9 —Credit, Transfer & Placement:</u>

This is the final page of the program wizard, which is focused on articulation and transfer initiatives as well as student placement/employment after program completion.

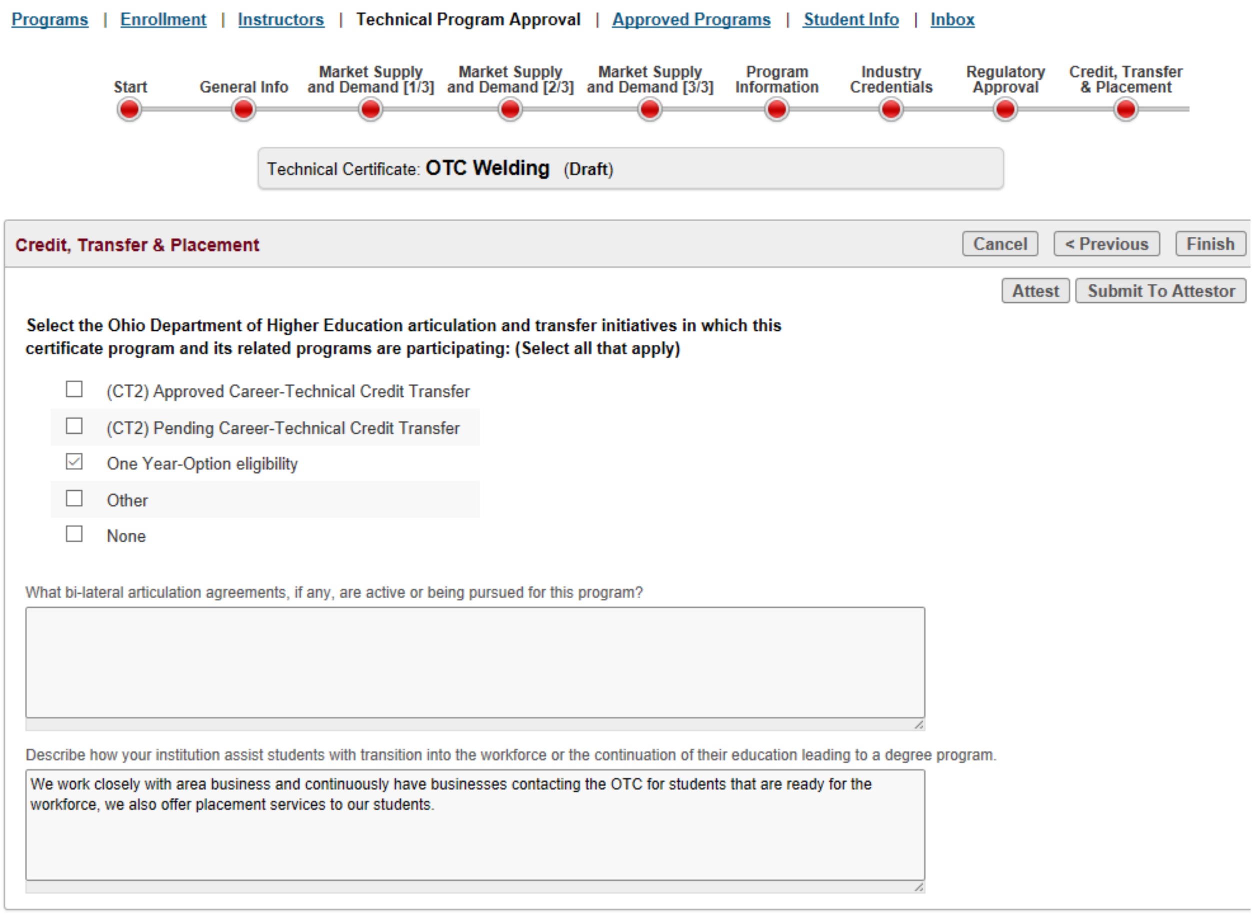
The User is asked to:

1. <u>Select the Ohio Department of Higher Education articulation and transfer initiatives in which this certificate program and its related courses are participating.</u> Please select all that apply.

Assistance with CT2 Information with a list of approved CTAG programs can be found at: **https://reports-cems.transfercredit.ohio.gov/pg_9?::NO:9**:

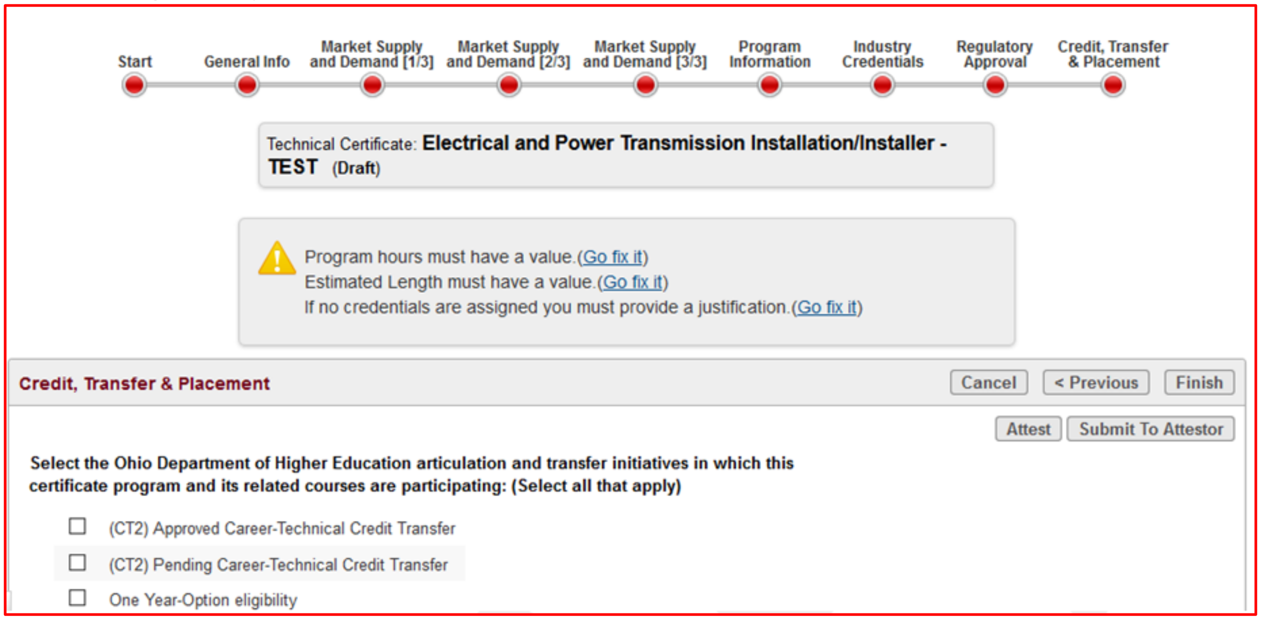
The next question will address Bi-lateral articulation agreements. If any are active and/or being pursued, a text box is provided to collect the information. Currently, if there are no agreements and no agreements being pursued, then N/A can be entered.

The final questions address assistance provided to the student(s) to transition into the workforce or continuing education. Information regarding services and/or institution polices should be provided in the text box.



After completing this process, the program wizard should be reviewed to ensure all required and pertinent information has been included as well as supporting documents attached (uploaded). If there is required information that is not supplied, the User and/or Attestor will be notified via an error message. If you received an "Error message" notification, follow the guidance to fix errors. Once errors are resolved, you are ready to submit the program to be approved/attested by the Attestor. The "User" will see "Submit to Attestor" the "Attestor" will see "Attest". Attested programs are then submitted to the ODHE System Administrator.

Error Message Example



Attesting a Program for Approved Technical Program Status

In order for a program that has been submitted through the Wizard to be recognized as an Approved Technical Program, it must first be Attested by the institution's Attestor. The process for submission of a program into the OTC database is referred to as *Attesting a Program*. The Attestor has the responsibility of ensuring that the Program Wizard application has all of the required fields completed and documents attached. After the review, the Attestor and the User (with direction from the Attestor) still have time to make changes to the program. If there are no changes needed or after changes are made and a final review, the Attestor can click "Attest," and the program is officially "Attested." This action will automatically submit the "Attested" program to the ODHE System Administrator.

NOTE

The Attestor and User are unable to make changes to the program when it is in the **Attest status**.

Preparing a Program to be Approved as Technical

The final page of the Wizard contains additional buttons for the Attestor and User. Once a program is ready for attesting, Users can indicate this by clicking on "Submit To Attestor" which removes the "Draft" status from the application. The Attestor will then be notified that a program is ready to be reviewed and Attested.

NOTE

A User does not have the authority to Attest a program. However, Attestors can click on "Attest," which automatically removes the "Draft" status.

To Attest a program:

1. Click the DATA tab.
2. Select the Technical Program Approval link.

3. Select the appropriate program by clicking on the view/edit icon.
4. Review the program and navigate to the final page of the Program Wizard
5. Click on the Attest button. 

Confirming an Attested Program

After the Attestor submits the Attested program, the ODHE System Administrator reviews the program. After the review, the System Administrator will either approve the program as "Technical" or decline it. If the program is approved, the System Administrator will send an approval letter to the institution via email informing them of their Approved Technical Program status. However, if the program does not meet the qualifications for approval after the review, it will be declined. A declined program is considered as a "General" program.

Declining an Attested Program

When the ODHE System Administrator declines a program, the program status is set to "Declined" within the institution's system. Once this occurs, the following applies:

- ODHE System Administrator must provide a reason why the program was declined.
- Program information can be edited by Attestor or User and resubmitted to ODHE System Administrator with revisions for approval.

In the case of a "Declined" program, an institution has the option to "Appeal" or to "Resubmit" it for approval. When a program is declined, the System Administrator will provide feedback on what must be corrected or included for program resubmission. The institution may accept these suggested modifications and resubmit the program for approval. However, if the institution does not agree with the suggested modifications and cannot reach an agreement with the System Administrator for the "declining" of the program, the institution could choose to appeal. If the institution chooses to appeal, it must follow the steps for "Appealing a Declined Program" found in the <u>Ohio Technical Center Program Approval Manual (also see appendix 6)</u>.

Appealing a Declined Program

If an institution receives a general designation or OTC program declination and would like to contest that status to receive a technical designation, the institution may submit an appeal form to ODHE. The appeal should address the criteria that were not met in the original submission. Institutions should submit appeals within six (6) months of notice of the general designation, general approval, or OTC program declination to avoid resubmitting all documentation.

Resubmitting a Declined Program

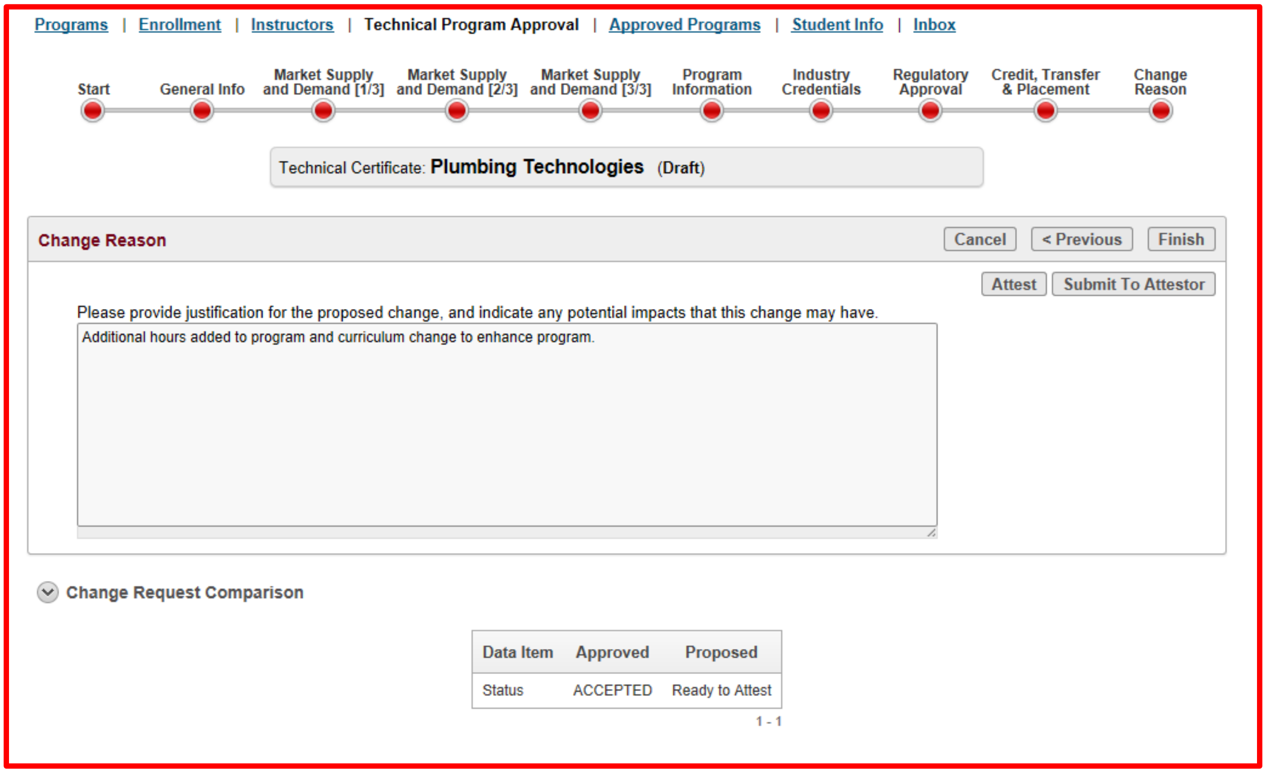
The Attestor and User both have the required access to edit program information for resubmission. Comments supplied by the ODHE System Administrator from the initial review should be used as a guide to assist in completing the resubmission process.

After the required information has been added to the program, it must again go through the previously mentioned "Attesting a Program" process.

To Prepare a program for Resubmission:

1. Click the **DATA** tab.
2. Select the **Technical Program Approval** link.
3. Select the appropriate program by clicking on the edit icon.
4. Attestor or User must follow the previously mentioned Program Wizard steps (1 – 9) entering suggested modifications and supporting documentation as necessary.

5. To complete the resubmission process, the User must click on "**Submit to Attestor"** sending it to the Attestor so they can click **"Attest."** If the Attestor is the only one resubmitting, all they will need to do is click **"Attest."**



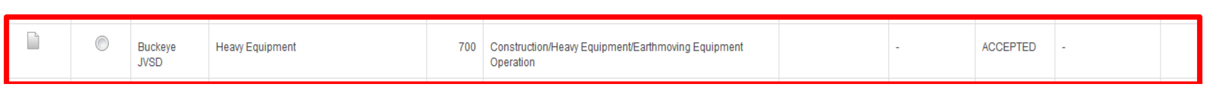
Revising an Approved Technical Program

In some instances, an Approved Technical Program may require changes to the curriculum's content, program name, program hours, a credential aligned to the program, CIP code, etc. Whatever the case, the OTC data system is designed to accommodate these types of change requests without submitting a new program request for approval. An existing Approved Technical Program can easily be revised and resubmitted for approval.

If the program is not in the OTC database, you will need to submit it as a new program and follow the "Approved Technical Program" process.

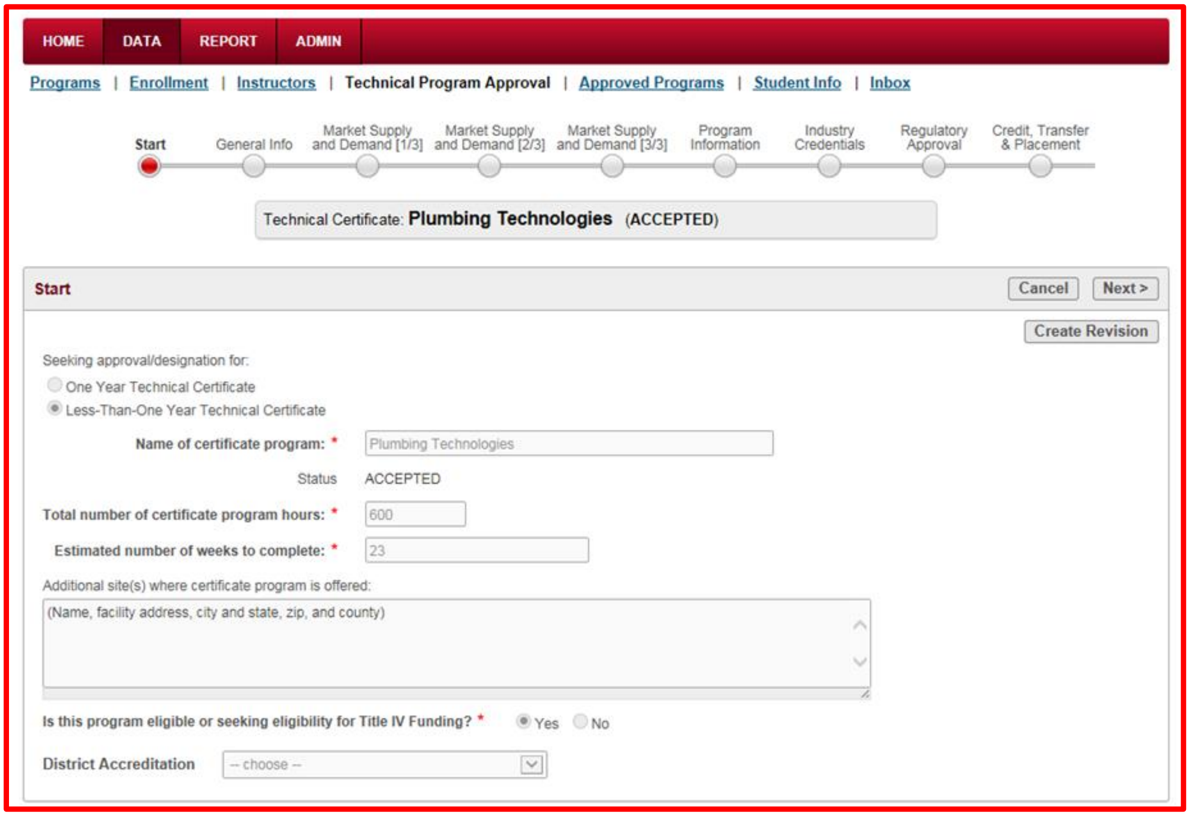
To revise an Approved Technical Program currently in the OTC database:

1. Click on the DATA Tab
2. Select Program Approval
3. Click on the **View/Edit** **Symbol of an ACCEPTED program**.



After clicking on the view symbol, the form will open revealing the "Create Revision" button. The form will contain previously entered information and documents that can be modified to incorporate program change(s). The User can also remove previously uploaded documents and upload current documents.

4. Click on the **"Create Revision"** button and the "Change Reason" section will be added to the
5. application. (See below)



After entering changes, please review the submitted information and provide justification for the change within the text box.

6. Click on "Attest" to submit the program for review and approval. (see below)

Copying Approved Technical Programs

This feature is useful if an Approved Technical Program that is to be added to the OTC application is similar to one that is currently in the system. Program copy works by simply copying the program data into a new application. A program in any status can be copied.

To copy a program:

1. Click the DATA tab.
2. Select the Program Approval link.
3. Find the program to copy and select the radio button.
4. Click on the Copy Selected button.

The copied program is created in Draft status and should be edited/modified to make it unique.

(i.e. change in hours; a revised curriculum would be required that aligns with the submitted hours.) The program would follow the same process to be reviewed and attested at the institution for submission to the ODHE System Administrator for approval.

Deleting Programs

Only an Attestor can delete a program. What actually happens to a program when deleted depends upon its status. If in "Draft," "Declined," "Submit To Attestor" or "Re-Submit To Attestor," deleting the program will remove the record from the system. If the record is in any other status, deleting it will change the status of the program to "Retired."

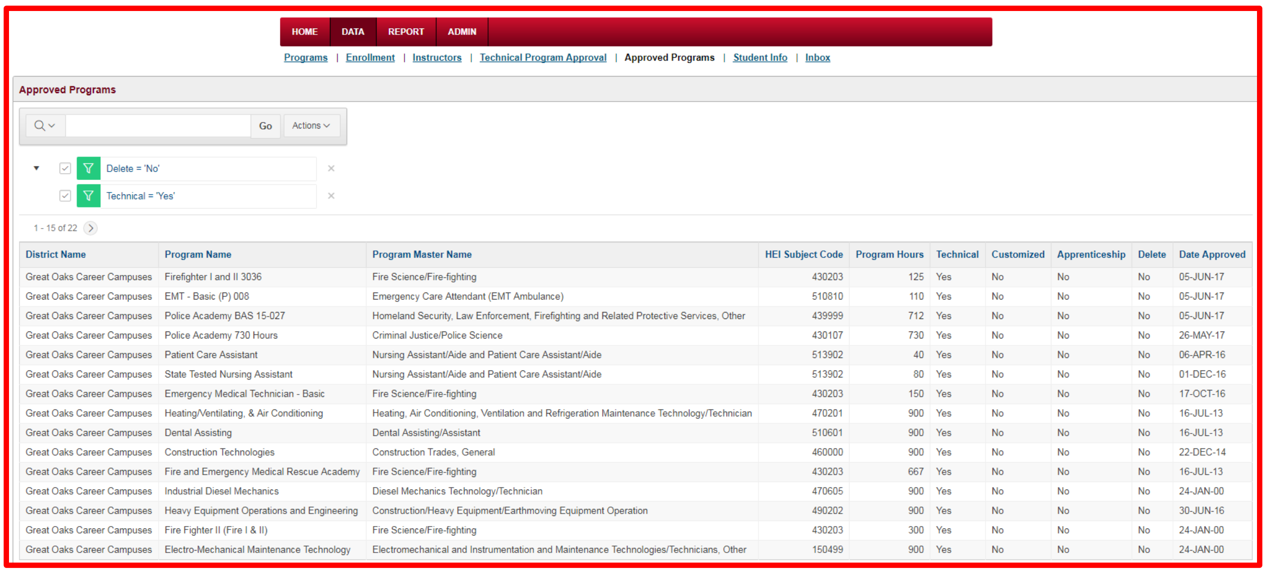
To delete a program:

1. Click the DATA tab.
2. Select the Program Approval link.
3. Find the program to delete and select the radio button.
4. Click on the Delete Selected button.

Upon confirmation, the program will be deleted or the status changed based on the status.

Approved Programs Page

The Approved Programs page provides users with the ability to view the allowed Programs that are associated with their district. Approved Programs are created by the ODHE System Administrator when a new Technical Program is approved.   The ODHE System Administrator will provide an approval letter for the institution.



District Name	Program Name	Program Master Name	HEI Subject Code	Program Hours	Technical	Customized	Apprenticeship	Delete	Date Approved
Great Oaks Career Campuses	Firefighter I and II 3036	Fire Science/Fire-fighting	430203	125	Yes	No	No	No	05-JUN-17
Great Oaks Career Campuses	EMT - Basic (P) 008	Emergency Care Attendant (EMT Ambulance)	510810	110	Yes	No	No	No	05-JUN-17
Great Oaks Career Campuses	Police Academy BAS 15-027	Homeland Security, Law Enforcement, Firefighting and Related Protective Services, Other	439999	712	Yes	No	No	No	05-JUN-17
Great Oaks Career Campuses	Police Academy 730 Hours	Criminal Justice/Police Science	430107	730	Yes	No	No	No	26-MAY-17
Great Oaks Career Campuses	Patient Care Assistant	Nursing Assistant/Aide and Patient Care Assistant/Aide	513902	40	Yes	No	No	No	06-APR-16
Great Oaks Career Campuses	State Tested Nursing Assistant	Nursing Assistant/Aide and Patient Care Assistant/Aide	513902	80	Yes	No	No	No	01-DEC-16
Great Oaks Career Campuses	Emergency Medical Technician - Basic	Fire Science/Fire-fighting	430203	150	Yes	No	No	No	17-OCT-16
Great Oaks Career Campuses	Heating/Ventilating, & Air Conditioning	Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Technician	470201	900	Yes	No	No	No	16-JUL-13
Great Oaks Career Campuses	Dental Assisting	Dental Assisting/Assistant	510601	900	Yes	No	No	No	16-JUL-13
Great Oaks Career Campuses	Construction Technologies	Construction Trades, General	460000	900	Yes	No	No	No	22-DEC-14
Great Oaks Career Campuses	Fire and Emergency Medical Rescue Academy	Fire Science/Fire-fighting	430203	667	Yes	No	No	No	16-JUL-13
Great Oaks Career Campuses	Industrial Diesel Mechanics	Diesel Mechanics Technology/Technician	470605	900	Yes	No	No	No	24-JAN-00
Great Oaks Career Campuses	Heavy Equipment Operations and Engineering	Construction/Heavy Equipment/Earthmoving Equipment Operation	490202	900	Yes	No	No	No	30-JUN-16
Great Oaks Career Campuses	Fire Fighter II (Fire I & II)	Fire Science/Fire-fighting	430203	300	Yes	No	No	No	24-JAN-00
Great Oaks Career Campuses	Electro-Mechanical Maintenance Technology	Electromechanical and Instrumentation and Maintenance Technologies/Technicians, Other	150499	900	Yes	No	No	No	24-JAN-00

Viewing a Program

Approved Technical Programs and General Programs are maintained by the ODHE System Administrator so district personnel can only view the details.

Program Page

Under the "Data" section a User will see the link for the "Programs" page. The Program page provides a drop down list of available Approved Technical Programs that can be offered during a fiscal year, as well as a text box to input General Program information for programs not receiving funding but being offered during a fiscal year. The page also provides related information available to a district including Program status, the year a Program was taught and the faculty member who taught the Program.

The following user roles have access to the Programs page.

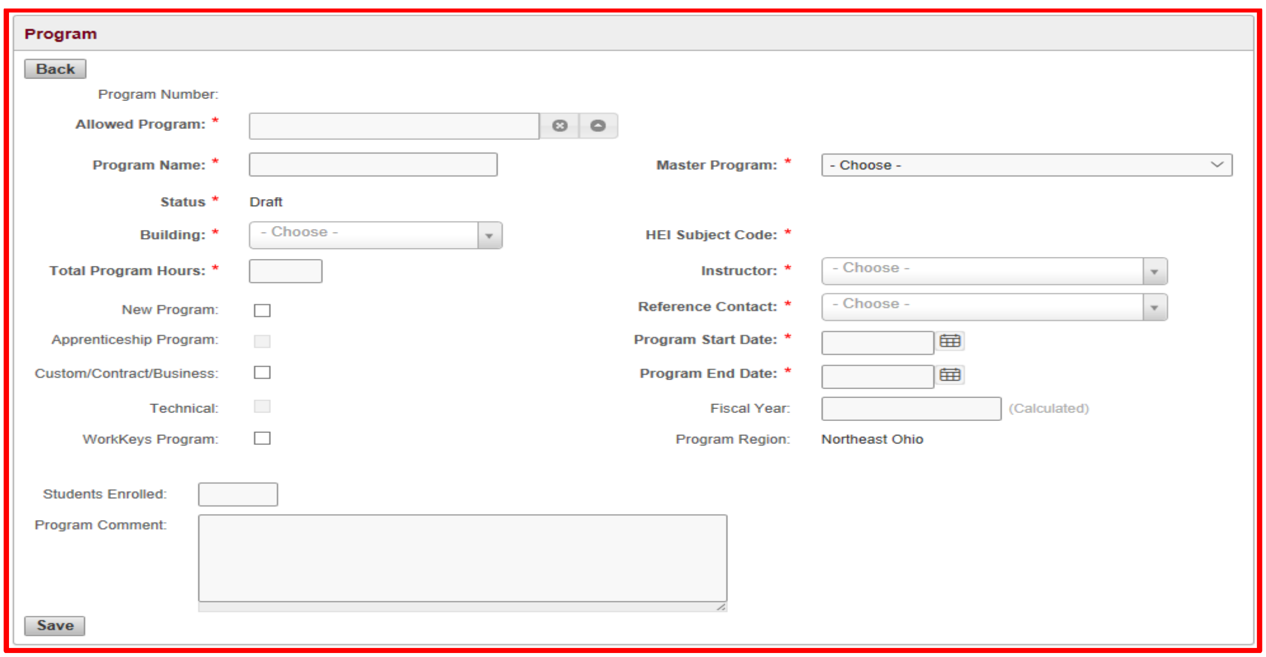
- OTC Attestor (HEI-Auth Role: Attestor)
- OTC User (HEI-Auth Role: OTC User)
- OTC Read Only User (HEI-Auth Role: OTC Read Only User)

From the Programs page, users with available permissions can:

- Add Technical and/or General Programs to be offered during a fiscal year
- Search for existing Approved Technical Programs and General Programs
- View existing Program information
- Edit Program information with the following status, draft, ready to be attested, void and reject allowing updates
- Delete existing Programs that are in Draft status
- Copy Programs

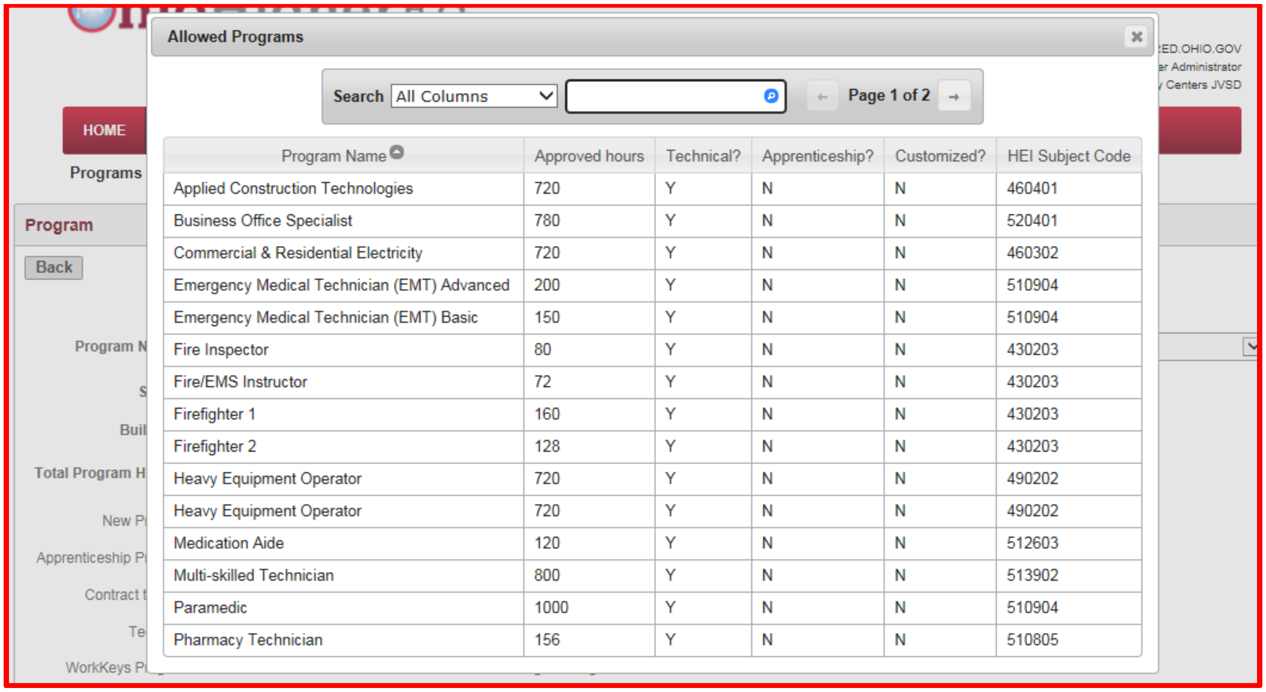
Offering a Program

To offer a Program go to "DATA" tab, click Add Program. This action will display the Program page.



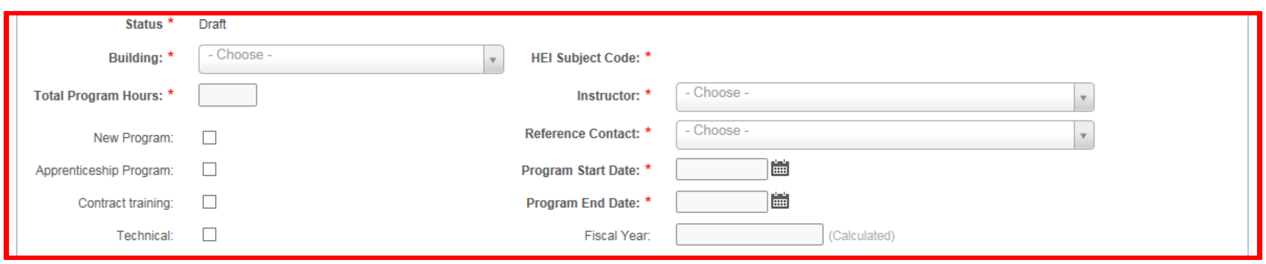
<u>Offering an Approved Technical Program</u>

1. When an institution decides to offer an Approved Technical Program, the process begins by selecting an Approved Technical Program from the Allowed Program drop down menu.



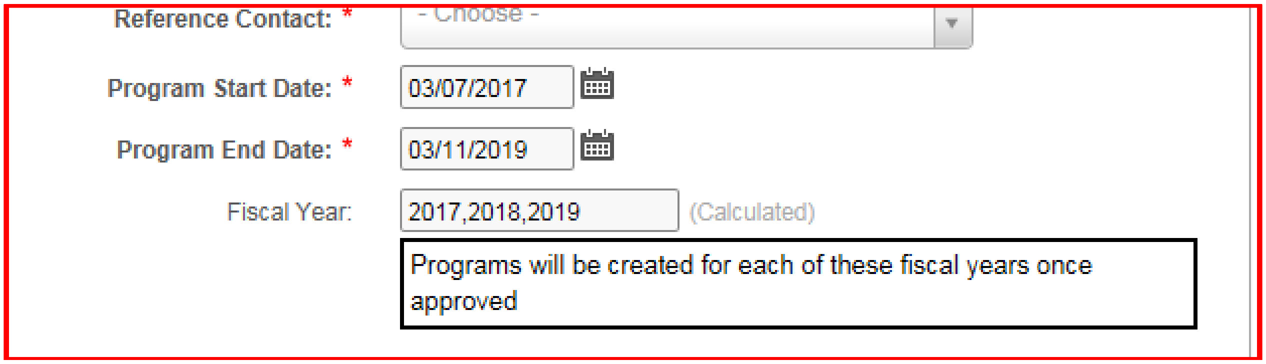
Program Name	Approved hours	Technical?	Apprenticeship?	Customized?	HEI Subject Code
Applied Construction Technologies	720	Y	N	N	460401
Business Office Specialist	780	Y	N	N	520401
Commercial & Residential Electricity	720	Y	N	N	460302
Emergency Medical Technician (EMT) Advanced	200	Y	N	N	510904
Emergency Medical Technician (EMT) Basic	150	Y	N	N	510904
Fire Inspector	80	Y	N	N	430203
Fire/EMS Instructor	72	Y	N	N	430203
Firefighter 1	160	Y	N	N	430203
Firefighter 2	128	Y	N	N	430203
Heavy Equipment Operator	720	Y	N	N	490202
Heavy Equipment Operator	720	Y	N	N	490202
Medication Aide	120	Y	N	N	512603
Multi-skilled Technician	800	Y	N	N	513902
Paramedic	1000	Y	N	N	510904
Pharmacy Technician	156	Y	N	N	510805

2. After selecting an Approved Technical Program from the Allowed Program menu, the Master Program box will disappear. It's not needed for Approved Technical Programs. Also, the total program hours for the Approved Technical Program will automatically display in the "Total Program Hours" box as well as the program's HEI subject code/CIP Code which will display in the "HEI Subject Code" area.

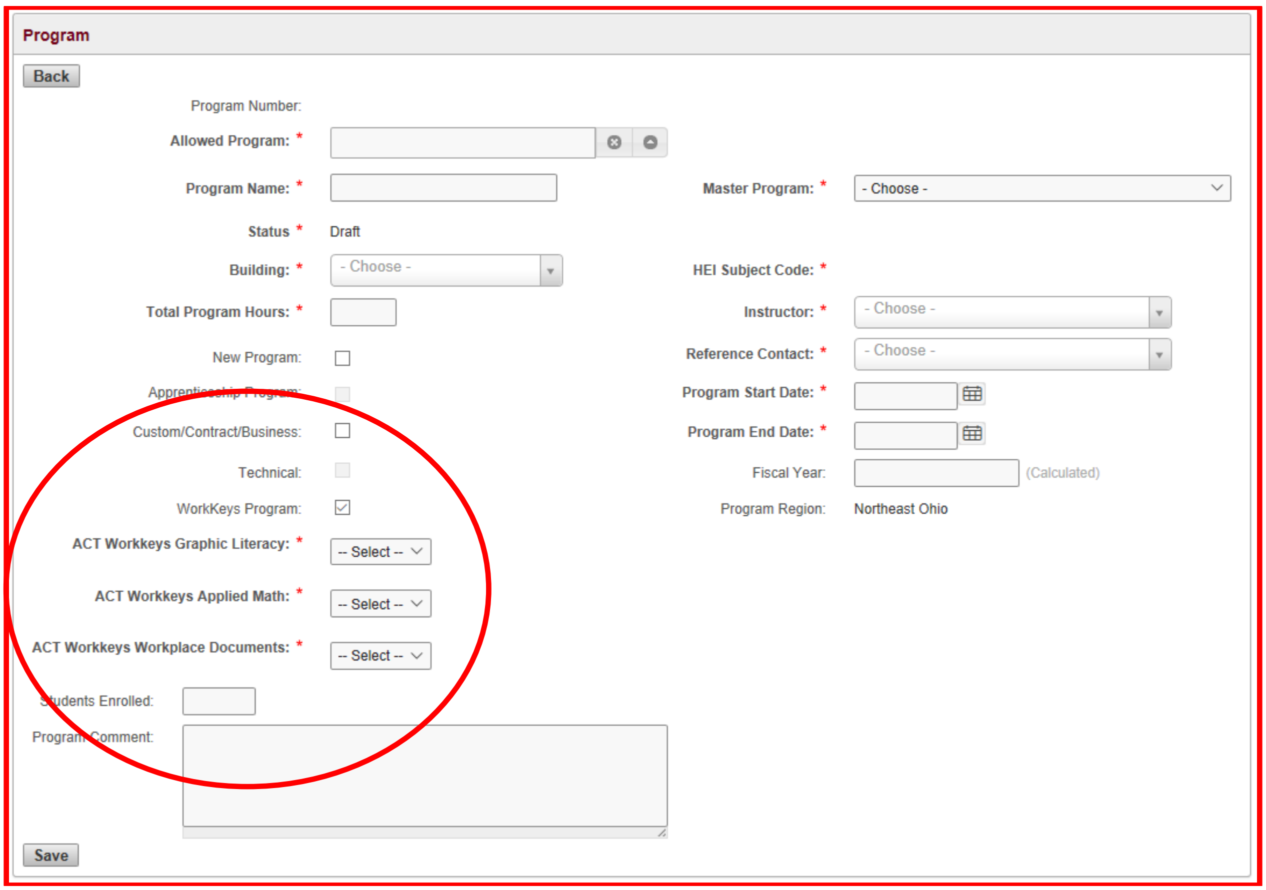


3. The institution must then select from the following text boxes:
   A. Building—Building IRN from drop down menu.
   B. Instructor—Instructors available to teach the program.
   C. Reference Contact—Individuals that can be contacted if there are program questions.

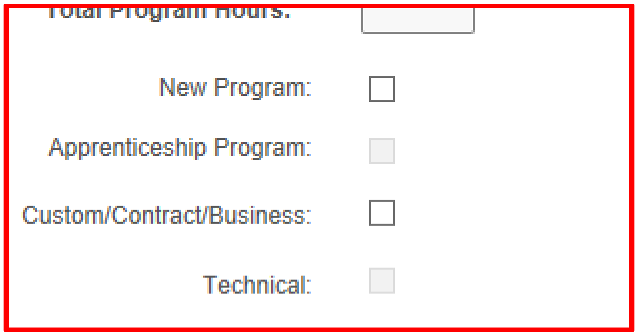
4. The institution must then select a "Program Start Date" and "Program End Date." This action will automatically populate the "Fiscal Year" box. For example, if the program starts and ends within the same fiscal year, the box will display that fiscal year. However, if the program crosses fiscal years starting in one fiscal year and ending in another, the box will display all the fiscal years associated with those start and end dates.



5. Once an Approved Technical Program is selected, the "Technical" box on the left side of the page is automatically checked. If the program offered WorkKeys, the institution must select the "WorkKeys Program" check box. After selecting this box, a new options menu will appear.



6. There are more check boxes on the left side of the page:
   - New Program
   - Apprenticeship Program
   - Custom/Contract/Business



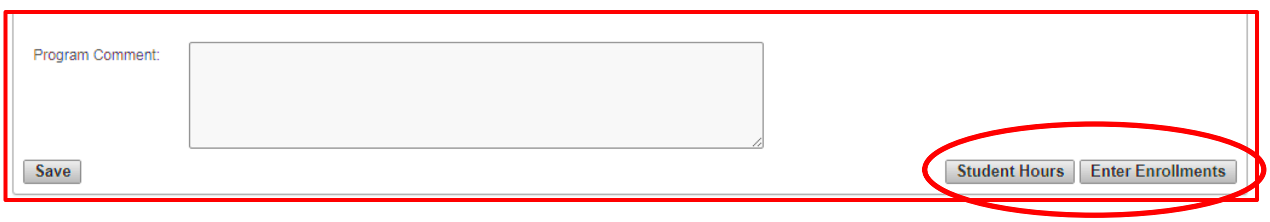
The “New Program” check box is not currently being used; however, the “Apprenticeship Program” box will automatically receive a check mark if the selected Approved Technical Program is an apprenticeship program. This status would have been determined during the Technical Program Approval process.

The “Custom/Contract/Business Training” box should only be selected if the institution is offering a “General” program considered for CTX funding. (see definitions sections for custom, contract or business training explanation).

<u>Including “Outside” Hours to an Approved Technical Program</u>

Once an approved technical program has been entered and saved in draft status, two additional buttons will appear on the lower right side of the Program page:

- Student Hours
- Enter Enrollments



Clicking on the "Student Hours" button will reveal a table listing the following categories: Student Name; Student Hours; Outside Hours; and Total Hours.

Student Hours per Student

Go Actions

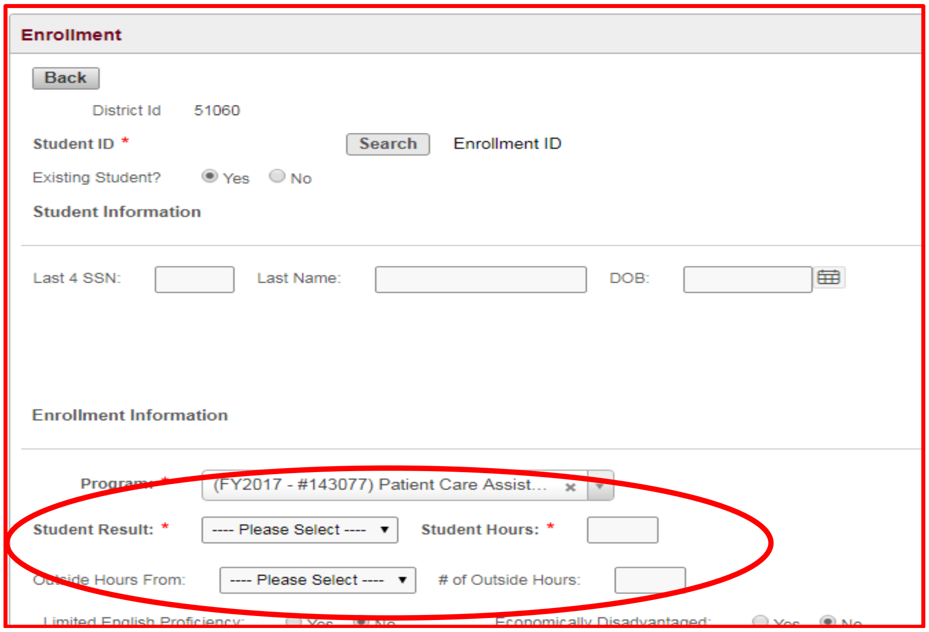
Student name	Student hours	Outside hours	Total hours
Bah, Issa	15	15	30
Bingham, Blair	80	0	80
Black, Joy	40	0	40
Blake , Matthew	40	0	40
Bonner, Gwendolyn	40	0	40
Marroquin, Esmeralda	40	0	40
Pritchard, Ashley	40	0	40
Rose, Kayla	40	0	40
Spikes, Kiuel	40	0	40
Steigerwald, Alexandra	40	0	40
Thurmond, Brianna	40	0	40

1 - 11

"Outside" Hours are the remaining Student Hours a student has carried with them from their previous institution or past participation in a technical program, which they did not complete. It is at the discretion of the institution to accept these hours. The hours must be equivalent to or in alignment with a program's content and/or curriculum. The total hours calculated from the Student Hours and Outside Hours cannot be greater than the total program hours.

When the OTC accepts a student's "Outside Hours," those hours are not to be calculated as a part of the student's program completion or Leaver hours. If program hours previously earned met funding formula performance categories, "Outside Hours" more than likely were calculated and distributed as a part of a past funding allocation. In order for an OTC to accept a student's "Outside Hours" there must be evidence on file (i.e., transcript, letter from previous institution, etc.) that verifies this entry.

The "Enter Enrollments" button takes the User to the Enrollment page automatically populating the student's program information. The user will continue to add all other data on this page, including where the "Outside" hours came from as well as the total number of "Outside" hours being accepted by the institution.



Offering a General Program

If the institution is offering a "General Program," meaning it is not an existing Allowed Program, then a Master Program needs to be selected also.

After selecting "Master Program," the following information will need to be entered:

- Program Name – Enter the correct name of the Program
- Total Program Hours – Please provide the total number of hours for the Program.
  - EXAMPLE: The number of hours should be inclusive of all labs, exams, educational experiences, etc.
- Program Start and End Dates – Pick the Program start date and end date from the pop-up calendar. If the Program crosses fiscal years, you must still provide the actual start and end date.
  - EXAMPLE: Program starts on 5/10/15 and ends on 11/20/15.
    - Correct: Program Start Date – 5/10/15; Program End Date – 06/20/15; or if a program crosses fiscal years: Start Date – 5/10/15; Program End Date – 12/20/15, always enter the true start and end dates of a program.
- Fiscal Year – The fiscal year is calculated automatically when the Program start and end dates are selected.
- Building – This drop down menu provides a list of buildings with their IRN numbers.
- Faculty Member – This provides an individual or a list of faculty that teaches the Program.
- Reference Contact – This provides an individual or a list of individuals responsible for the Program.
- Program Comment – This allows a user to enter any additional information as needed.
- WorkKeys Program – Enter this information if it is required
- Students Enrolled – Enter the number of students that have enrolled in program

Click **Save** to add the new Program or **Back** to return to the main Program page.

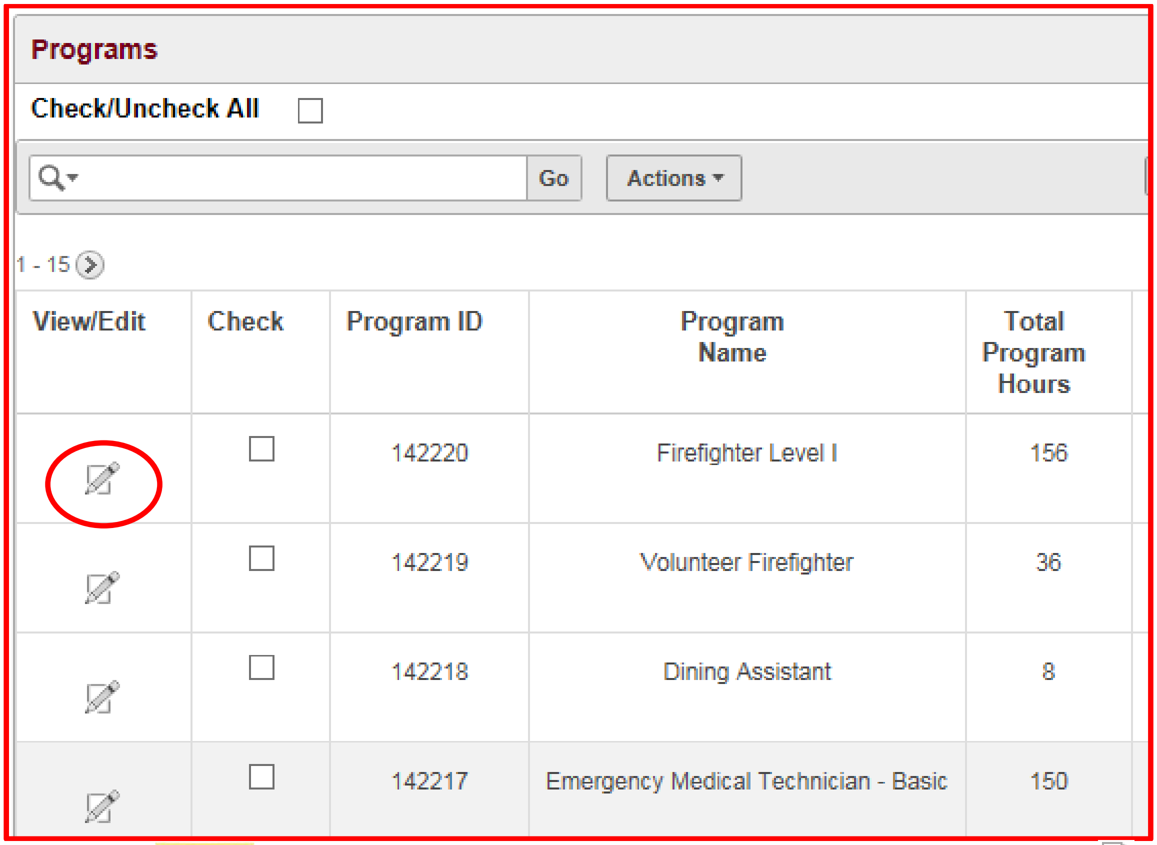
Viewing/Editing Programs

NOTE

All roles can view Program details. Only the Attestor and User can edit Program information for their district only.

To view a Program:

1. Click the **DATA tab**.
2. Find the Program to view and click .



Programs

Check/Uncheck All

Go | Actions

1 - 15

View/Edit	Check	Program ID	Program Name	Total Program Hours
		142220	Firefighter Level I	156
		142219	Volunteer Firefighter	36
		142218	Dining Assistant	8
		142217	Emergency Medical Technician - Basic	150

NOTE

If the user has permission to view and edit Program information, will be .

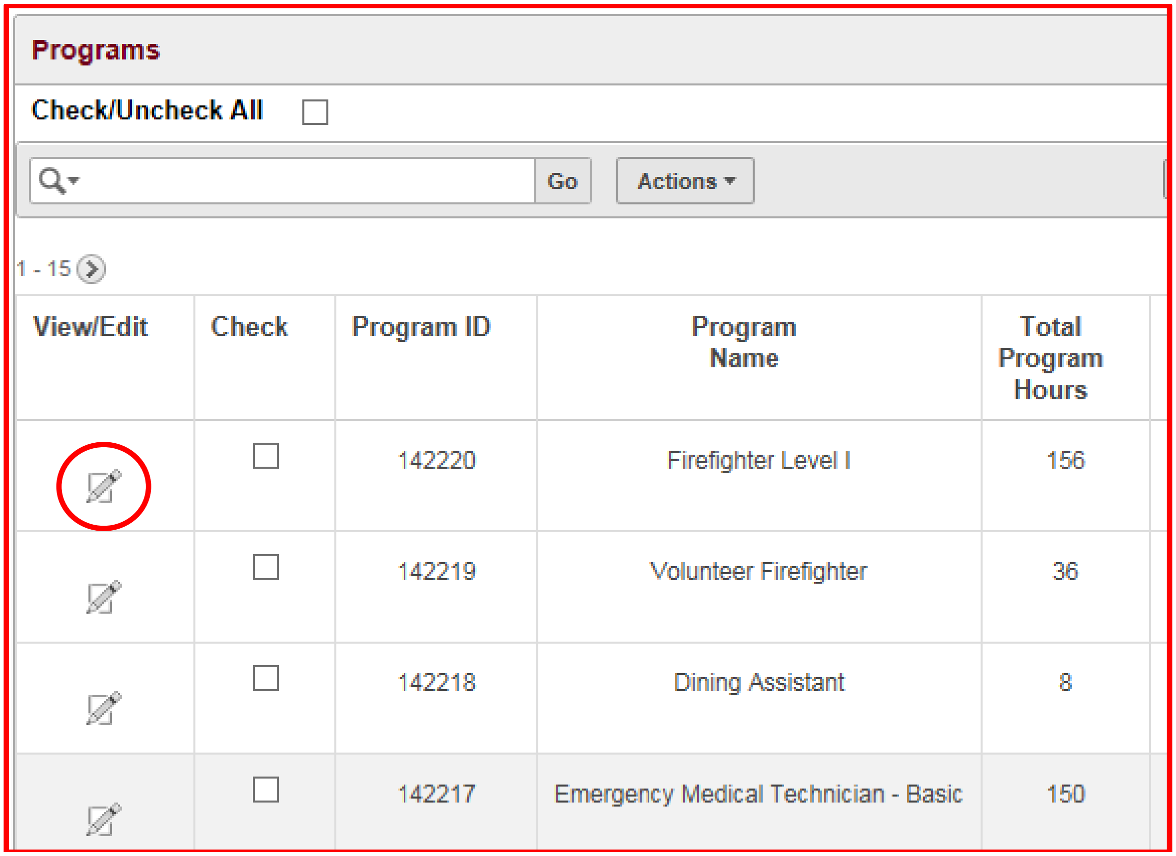
3. Click **Back** when finished viewing the Program information.

NOTE

Only those Programs that are in draft, ready to attest, void and reject allowing updates can be edited.

To edit Program:

1. Click the **DATA tab**.
2. Find the Program to edit and click .



Programs

Check/Uncheck All

Go Actions

1 - 15

View/Edit	Check	Program ID	Program Name	Total Program Hours
		142220	Firefighter Level I	156
		142219	Volunteer Firefighter	36
		142218	Dining Assistant	8
		142217	Emergency Medical Technician - Basic	150

The fields that can be edited are the same as when the Program was added. The exception is that when editing a transferred Program, only the faculty entries can be edited.

3. Make necessary changes.
4. Click Save to keep the changes or click Back to abort and return to the main Program page.

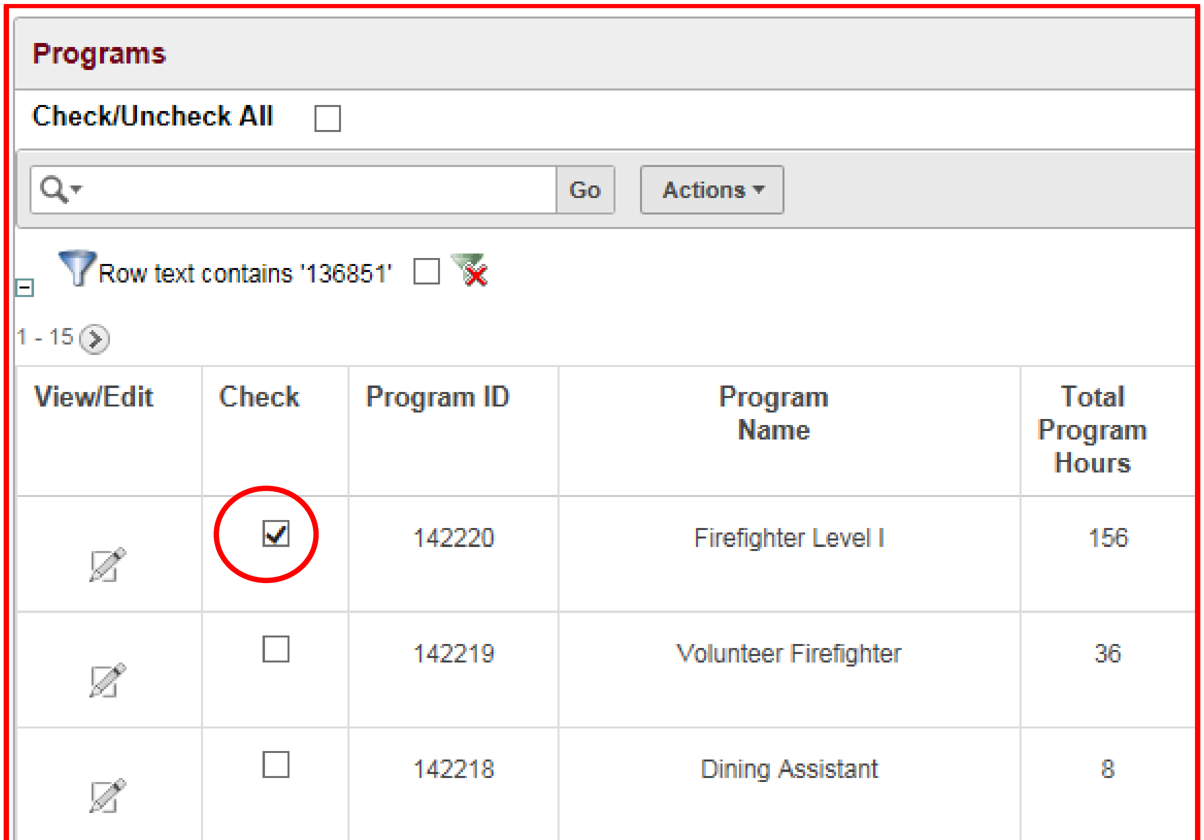
Deleting Programs

NOTE

Only programs that are in a draft status can be deleted. There is no way to return a program to draft status once it is attested. Rejecting a program allowing updates will send it back to the Attestor inbox where the Attestor can modify and re-attest the Program.

To delete a Program:

1. Click the **DATA tab**.
2. Find the Program to delete and select the check box.



View/Edit	Check	Program ID	Program Name	Total Program Hours
	☑	142220	Firefighter Level I	156
	☐	142219	Volunteer Firefighter	36
	☐	142218	Dining Assistant	8

Helpful Tip

Multiple Programs can be selected and deleted. Use the Check/Uncheck All to select or deselect all Programs.

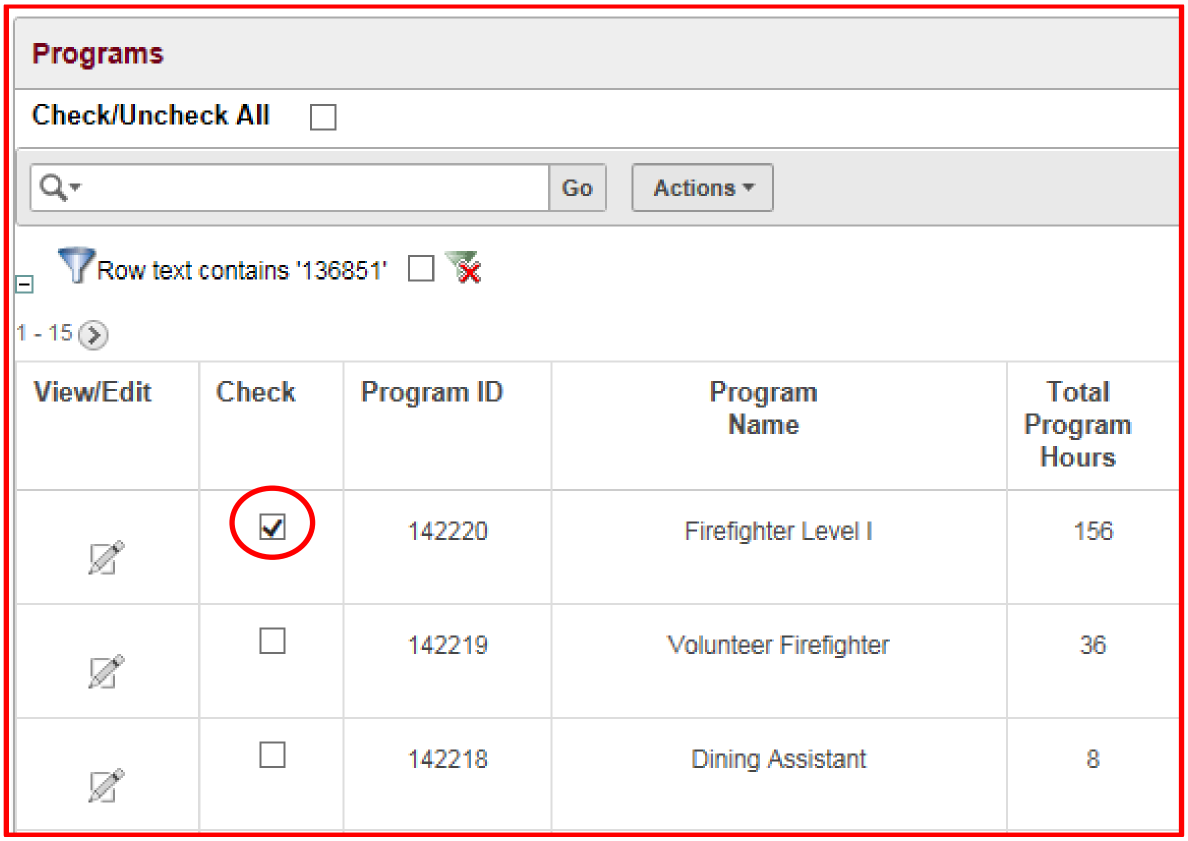
3. Click **Delete Selected**. A confirmation dialog box displays.
4. Click OK to delete the Program or Cancel to return to the main Programs page.

Copying Programs

This feature is useful if a Program that is to be added to the OTC application is similar to one that was offered before. Program copy works by simply copying some program fields into a new program.

To copy a Program:

1. Click the **DATA** tab.
2. Find a single Program to copy and select the check box.
3. Click Copy Selected.



View/Edit	Check	Program ID	Program Name	Total Program Hours
	☑	142220	Firefighter Level I	156
	☐	142219	Volunteer Firefighter	36
	☐	142218	Dining Assistant	8

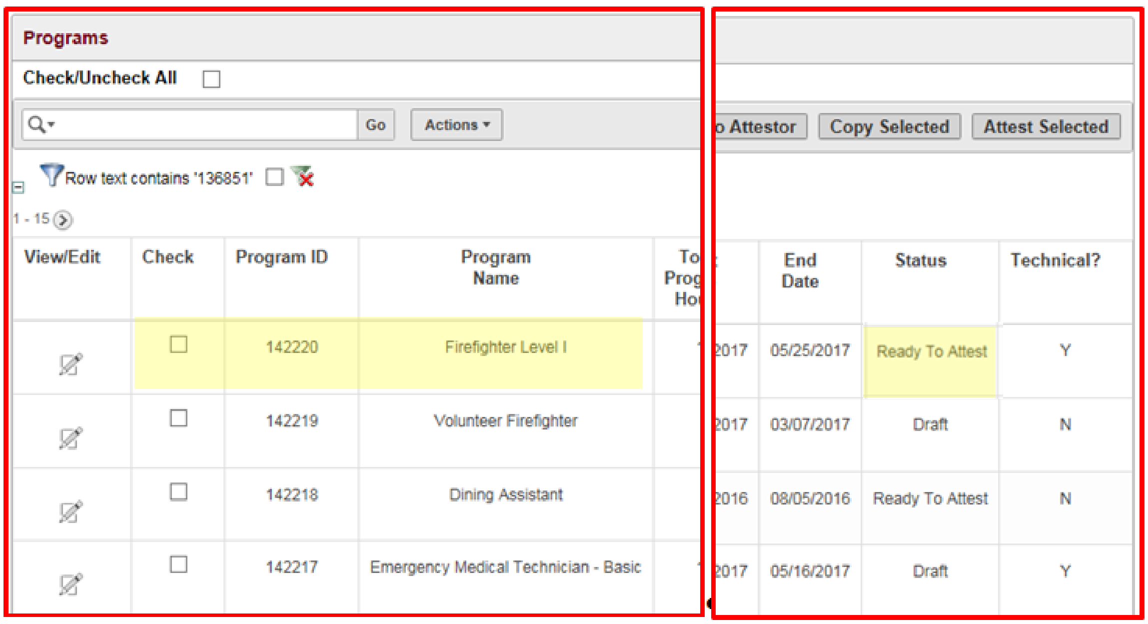
Preparing a Program for Attesting

User can indicate that a Program is ready for attesting by changing the status from Draft to "Ready to Attest."

Only a User can change the status of a Program from Draft to Ready to Attest. However, Attestors can change the status of a Program from Draft directly to Funded or Not Funded.

To ready a Program for attesting:

1. Click the **DATA** tab.
2. Select the **Program** link.
3. Find the Program ready to attest and select the check box. Ensure that the Program status is Draft.
4. Click **Submit To Attestor**.
5. Optional: Ensure that the status has changed from Draft to Ready to Attest.



Attesting Programs

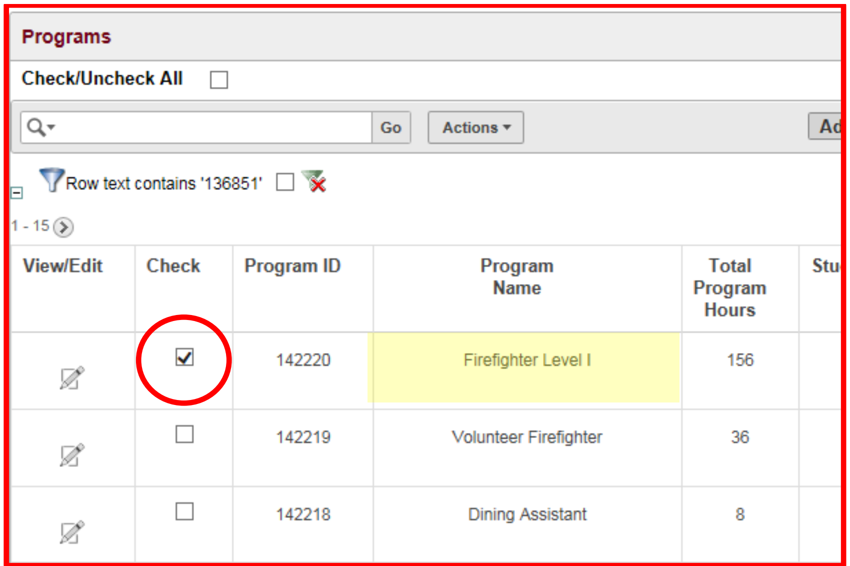
To attest a Program, the following criteria must be met. A Program:

- Must be in Draft or Ready to Attest status
- Have all required fields completed
- Have at least one enrollment with result status and student hours set

There are two ways to attest a program. It can be attested by using the Program page or the Inbox.

To attest a Program using the Program page:

1. Click the **DATA** tab.
2. Select **Program** link.
3. Find the Program to attest and select the check box.



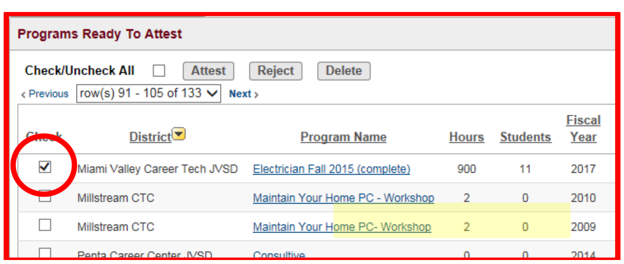
Multiple programs can be selected and attested. Use the Check box to select or deselect all programs.

4. Click **Attest Selected**.

If it is an **Approved Technical Program** is can be attested and if it is attested successfully, the program will be reimbursed. **General Programs** do not need to go through this process. <u>General programs will not be reimbursed.</u> If the OTC wishes to enter detailed data for a General Program that function is available.

To attest a Program using the Inbox link follow these steps:

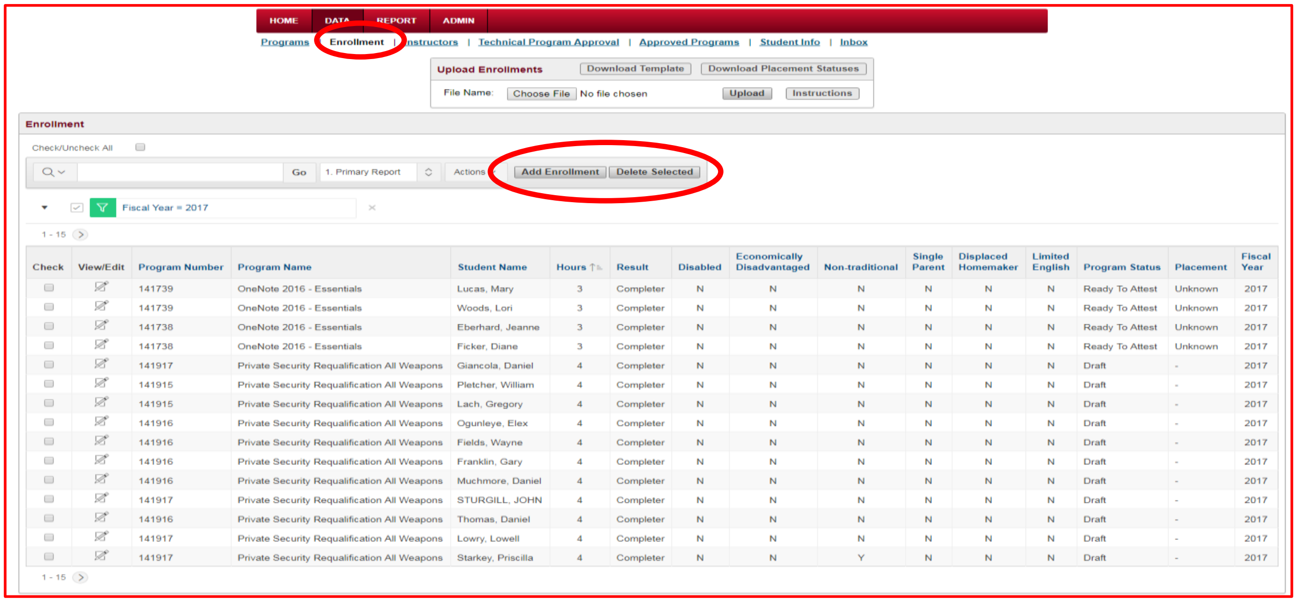
1. Click the **DATA** tab.
2. Select the **Inbox** tab.
3. Find the program to attest from the program "Ready to Attest" section and select the check box.



4. Click **Attest**.

Enrollment Page

The Enrollment page provides Users with the ability to enter new or update existing enrollment data, allowing them to add students to a program one student at a time.



Check	View/Edit	Program Number	Program Name	Student Name	Hours	Result	Disabled	Economically Disadvantaged	Non-traditional	Single Parent	Displaced Homemaker	Limited English	Program Status	Placement	Fiscal Year
		141739	OneNote 2016 - Essentials	Lucas, Mary	3	Completer	N	N	N	N	N	N	Ready To Attest	Unknown	2017
		141739	OneNote 2016 - Essentials	Woods, Lori	3	Completer	N	N	N	N	N	N	Ready To Attest	Unknown	2017
		141738	OneNote 2016 - Essentials	Eberhard, Jeanne	3	Completer	N	N	N	N	N	N	Ready To Attest	Unknown	2017
		141738	OneNote 2016 - Essentials	Ficker, Diane	3	Completer	N	N	N	N	N	N	Ready To Attest	Unknown	2017
		141917	Private Security Requalification All Weapons	Giancola, Daniel	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141915	Private Security Requalification All Weapons	Pletcher, William	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141915	Private Security Requalification All Weapons	Lach, Gregory	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141916	Private Security Requalification All Weapons	Ogunleye, Elex	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141916	Private Security Requalification All Weapons	Fields, Wayne	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141916	Private Security Requalification All Weapons	Franklin, Gary	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141916	Private Security Requalification All Weapons	Muchmore, Daniel	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141917	Private Security Requalification All Weapons	STURGILL, JOHN	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141916	Private Security Requalification All Weapons	Thomas, Daniel	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141917	Private Security Requalification All Weapons	Lowry, Lowell	4	Completer	N	N	N	N	N	N	Draft	-	2017
		141917	Private Security Requalification All Weapons	Starkey, Priscilla	4	Completer	N	N	Y	N	N	N	Draft	-	2017

1 - 15

The following user roles have access to the Enrollment page.

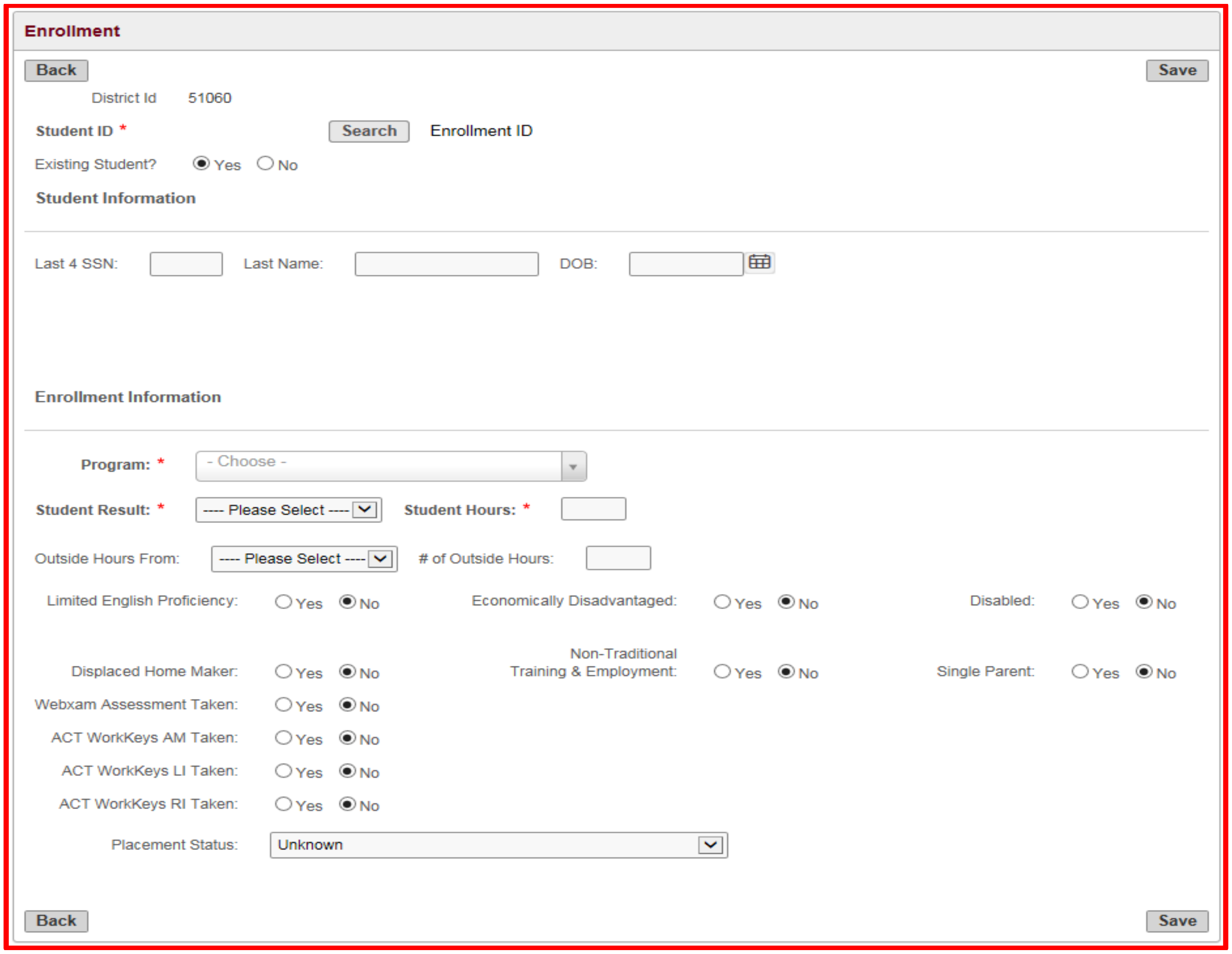
- OTC Attestor (HEI-Auth Role: Attestor)
- OTC User (HEI-Auth Role: OTC User)
- OTC Read Only User (HEI-Auth Role: OTC Read Only User)

From the Enrollment page, users can:

- Search for enrollments per Program using filters
- Add new enrollment information
- Search existing enrollment records
- View and edit existing enrollment details
- Delete existing Program enrollments
- Upload enrollments

Not all user roles can perform every function listed above, but the tables presented earlier in this document explains roles and responsibilities of users.

Adding Enrollments



To add enrollments follow these steps:

1. Click the **DATA** tab.
2. Select the **Enrollment** link.
3. Click **Add Enrollment**.
4. Select the **Yes** radio button if the student is already in the application or the **No** radio button student is new.

If the student exists in the application, proceed to step 6. If the student is new, refer to the Adding Students section for more information.

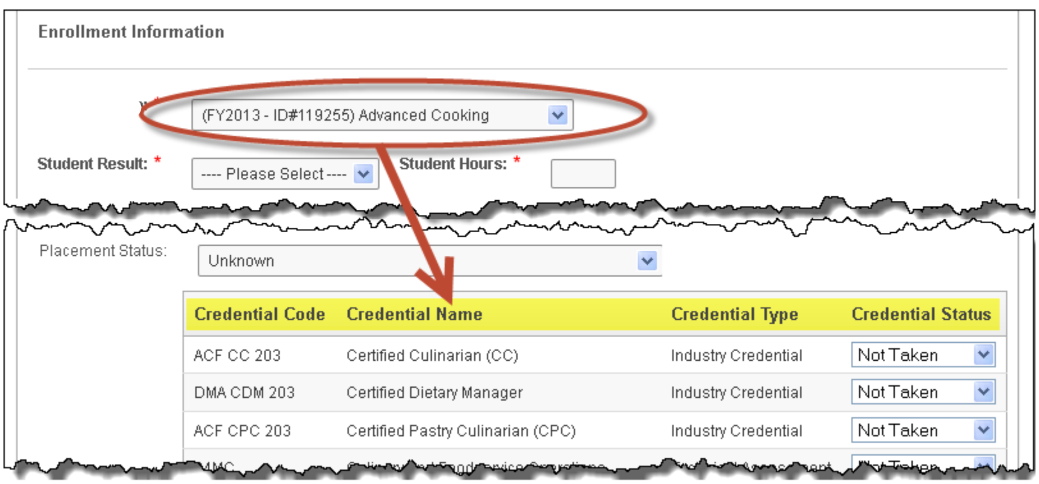
5. Search for the student to enroll by entering one or more of the following:
   - Last four digits of the student's Social Security Number.
   - Student's last name
   - Student's date of birth
6. Click **Search**.
7. Select the Program to enroll the student in from the drop-down list.

Once a program is selected, a section for the program's credential information displays referencing a credential code, credential name, the type of credential (technical assessment, industry credential, or state license), and credential status (select Pass, Fail, or "Not Taken"). This section is optional and is not needed to add an enrollment.

For data submission purposes, the following definitions apply for "type of credential":

A *credential* can be the following:

- Technical Assessment (Assessment or Certificate) – Third-Party Assessment or Certificate curriculum used in conjunction with a locally developed technical program approved by the Chancellor with a grade of C or better or grade of pass if pass/fail basis.
- Industry Credential (Certification) – Third-party recognized industry credential earned by a student after passing an industry certification exam that allows a student to work within their chosen career field.
- State License – Third-party recognized industry credential earned by a student after passing the state board administered exam that allows a student to work within their chosen career field.



8. Select the Student Result from the drop-down list.

There are two categories of student results: Completer and Leaver.

- Completer – Students who successfully complete a post-secondary technical program approved by the Chancellor with a grade of C or better or grade of pass if pass/fail basis. Also, at a minimum, the student has achieved 90% attendance for the class and has met all Program requirements as deemed acceptable for completion by the institution.
    - This type of technical program is developed to prepare a student to take a third-party industry recognized certification exam or a state board license exam.

- Leaver – A student that enrolled into a technical Program at an OTC and left or dropped out of the institution, failing to complete the Program.

Students who are in programs that cross fiscal years and remain in that program into the new fiscal year are considered as continuing students. These students normally show up in the Perkins *3A1 Performance Measure: Retention and Transfer*. This result is entered **automatically** once program years are determined, so institutions do not have to select a category for students falling in this category.

9. Enter the Student Hours.
   - Student hours will vary based on the student's results (see Appendices 1 & 2).
     - Completer – If the student is a *Completer*, please provide the total number of Program hours needed to complete the Program.
       - EXAMPLE: Student enrolled in a 900 hour Program and completes all Program requirements at a minimum of 90% (810 hours) of the program. The institution should input 900 hours in the Student Hours text box (see appendix 2).
     - Leaver – If the student is a *Leaver*, please provide the total number of attendance hours the student achieved.
       - EXAMPLE: Student enrolled in a 900 hour Program and finishes 780 hours of the program, but does not fulfill all the requirements deemed necessary by the institution for completion. The institution should input 780 hours in the Student Hours text box. Submit actual attendance hours for Leavers.
     - Continuing – If the student is *Continuing*, please provide the total number of attendance hours the student achieved within the fiscal year.
       - EXAMPLE: Student enrolled in a 1200 hour Program that crosses fiscal years. In Fiscal Year 1, the student finishes 545 hours of the program. The OTC data system automatically captures the student as *Continuing* and the institution inputs 545 hours in the Student Hours text box. In Fiscal Year 2, the student finishes 655 hours, or at a minimum 90% of the total Program hours to complete the Program meeting all the requirements deemed necessary by the institution for completion. The institution marks this student as a *Completer* and inputs the remaining 655 hours or number of hours that equals to 1200 hours in the Student Hours text box. If the student does not complete in Fiscal Year 2, the institution should mark them as a *Leaver* and input the actual attendance hours in the Student Hours text box.
10. Outside Hours.
    - Select where the Outside Hours come from:
      - Current OTC
      - Another Ohio OTC
      - In-state Institution
      - Out-of-State Institution
      - Other
    - Enter Outside Hours

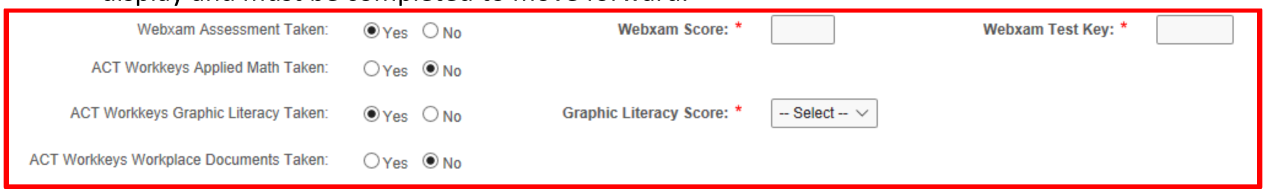
        - These hours are the remaining Student Hours a student has carried with them from a previous institution or past participation in a technical program at the current institution, which they <u>did not complete</u>. It is at the discretion of the institution to accept these hours. The hours must be equivalent to or in alignment with a program's content and/or curriculum. The total hours calculated from the Student Hours and Outside Hours cannot be greater than the total program hours.

11. Select the **Yes** button or the **No** button for the following Special Populations categories:
    - Limited English Proficiency
        - Students whose primary language is not English and/ or live in a family or community in which a language other than English is dominant. This group also includes individuals who need to enhance their abilities in the areas of speaking, reading, writing and understanding the English language.
    - Disadvantaged (Economically Disadvantaged)
        - Any individual or member of a family who receives need based financial assistance, or whose income is at or below the poverty level as defined by the U.S.
            - Economically Disadvantaged can be determined in various ways by an institution. Generally, institutions submit this data based on the following:
                a. Financial Aid
                b. Pell Grant/Student Loans
                c. Federal Poverty Index
                d. Temporary Assistance for Needy Families (TANF)
                e. Supplemental Nutrition Assistance Program (SNAP)
                f. Others (institutions might use other variables to determine economically disadvantaged)
    - Disabled
        - These are those individuals who meet the disability eligibility criteria under the Americans with Disabilities Act of 1990 and the Individuals with Disabilities Education Act of 2005.
    - Displaced Home Maker
        - These are adults who have worked for a substantial number of years providing unpaid household services for family members, and are not currently gainfully employed. This also includes those who:
            - Are unemployed or underemployed and individuals who have had or would have difficulty in securing employment.
            - Have been dependent on the income of another household member but are no longer supported by such income;
            - Have been dependent on public assistance but are no longer eligible for such assistance or may have been terminated from such assistance;
            - Are the parents of a minor child who is supported by public assistance or child support but are within two years of termination from such support.
    - Non-Traditional Training and Employment (Selection is Automatic)
        - <u>The selection is made automatically depending on the gender of the student and the Non-traditional gender of the program in which they have enrolled</u>. The User does not have to self-select. These are students in programs that are

designated as preparing them for occupations or fields of work in which individuals from one gender comprise less than 25% of the total number of individuals employed in that occupation or field of work.

- Single Parent
    - Single parents are defined as individuals who are unmarried or legally separated and have custody or joint custody of one or more minor children. This group also includes pregnant women, and teenagers who are pregnant.

12. Select the **Yes** button or the **No** button for the following Assessment Taken categories:
    - Webxam Assessment Taken
    - WorkKeys Applied Math Taken
    - WorkKeys Graphic Literacy Taken
    - WorkKeys Workplace Documents Taken
13. If the **Yes** button is selected for Webxam Assessment or ACT WorkKeys, additional fields will display and must be completed to move forward.



YES Button	Associated Field
Webxam Assessment Taken	Webxam Score
ACT WorkKeys Applied Math Taken	Applied Math Score
ACT Workkeys Graphic Literacy Taken	Graphic Literacy Score
ACT Workkeys Workplace Documents Taken	Workplace Documents Score

14. Select Placement Status from the drop-down list, which is displayed below.

1. MRE – Military Related
2. MNR – Military non-related
3. ERR – Employed related and pursuing related education
4. ERN – Employed related and pursuing non-related education
5. ERA – Employed related and not pursuing additional education
6. ENR – Employed non-related and pursuing related education
7. ENN – Employed non-related and pursuing non-related education
8. ENA – Employed non-related and not pursuing additional education
9. NWR – Not working and pursuing related education
10. NWN – Not working and pursuing non-related education
11. NWA – Not working but actively seeking employment
12. NWS – Not working and not seeking employment
13. IVL – In the voluntary labor force
14. UNK – Unknown
15. DEC – Deceased

The Placement Status field can be updated at any time by a User or Attestor and is not dependent on Program status. There will be times when a student has not obtained a job immediately or six (6) months after completing their program, and passing a credentialing exam.

- Placement Status refers to a student finding employment immediately or at least six (6) months after completing a program, receiving a third-party credential, enlisting in the military, enrolling in an apprenticeship program, or furthering their education.
    - For employment/placement data, each institution's accrediting body requests verification for students that are identified as employed or placed. The OTCs use two different accreditors: Council on Occupational Education (COE) and the Accrediting Commission of Career Schools and Colleges (ACCSC). There are a set of institutions under the purview of COE and another under ACCSC. These two bodies have different record verification processes for employment. The processes are conducted in the following manner:
        - <u>COE employment/placement verification</u>: Schools must meet a benchmark of 70 percent placement in a career and technical field related to training for the programs offered. During the regularly scheduled accreditation site visits, COE randomly selects 25 students to verify job placement. If the school is found falsely representing student placement, the institution is placed on watch status and in danger of losing accreditation.
        - <u>ACCSC employment/placement verification</u>: Schools must meet a benchmark ranging between 62—70 percent (percentage based on program length) placement in a field related to training for all programs. ACCSC requires written verification of employment from students or employers, and requests this verification during a site visit review.

15. Click **Save**.

NOTE

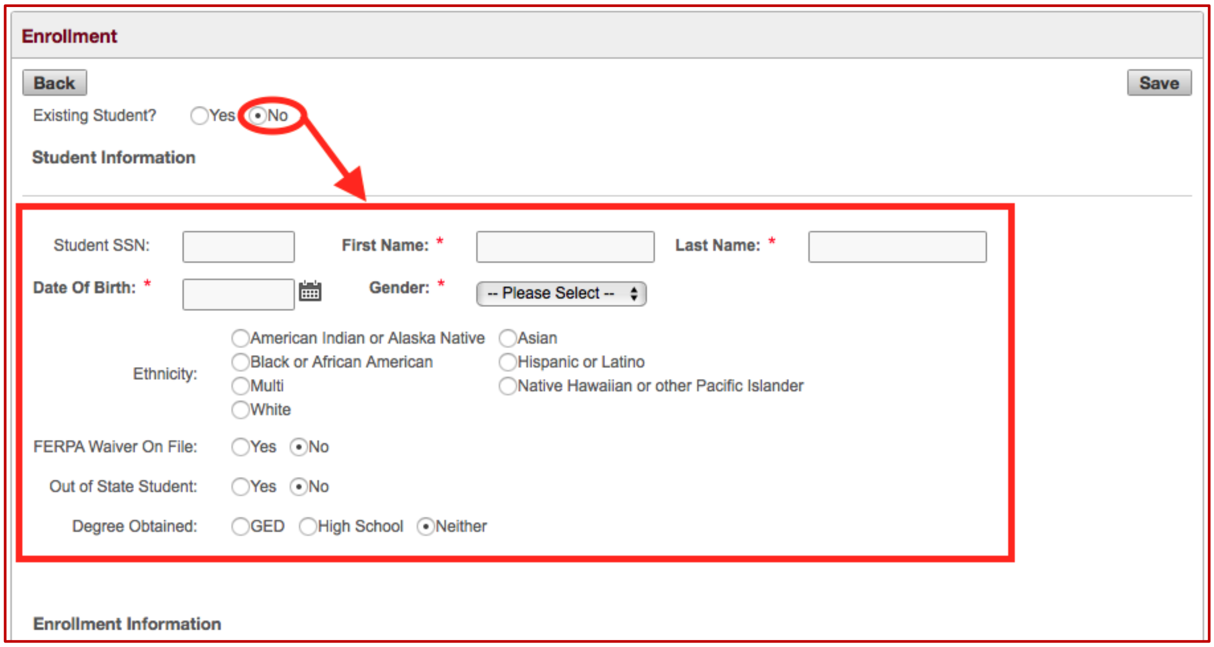
A confirmation message will display if adding the enrollment was successful.

Adding Students

To add students:

1. Click the **DATA** tab.
2. Select the **Enrollment** link.
3. Click 

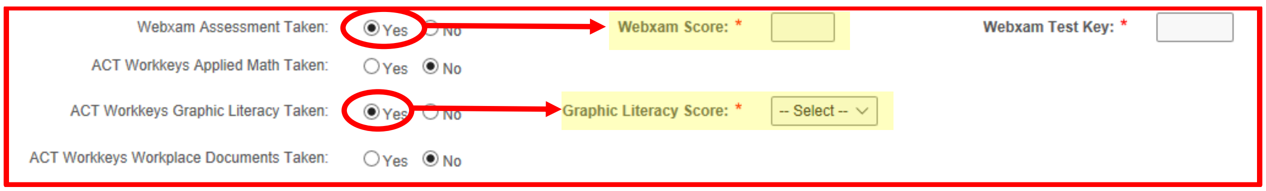
.
4. Select the **No** radio button to indicate that the student is new. A new student section displays.



5. Enter the student information. The following fields are required.
   - First Name
   - Last Name
   - Gender
   - Date of Birth
6. The following fields and buttons are required for reporting.
   - Out of State High School
   - Out of State Student
   - FERPA Waiver on File
7. The following fields and buttons are optional, but could be helpful for current and future reporting.
   - Ethnicity
   - High School Graduation Year
   - High School Attended
8. Select the Program to enroll the student in from the drop-down list.

Once a Program is selected, a section for the Program's credential information displays referencing a credential name, credential code, type of credential (technical assessment, industry credential, or state license), and credential status (select Pass, Fail, or "Not Taken"). This section is optional and is not needed to add an enrollment.

9. Select the Student Result from the drop-down list.
10. Enter the Student Hours.
11. Select the **Yes** button or the **No** button for the following Special Population categories:
    - Limited English Proficiency
    - Disadvantaged
    - Disabled
    - Displaced Home Maker
    - Single Parent
12. Select the **Yes** button or the **No** button for the following Assessment Taken categories:
    - Webxam Assessment Taken
    - WorkKeys Applied Math Taken
    - WorkKeys Graphic Literacy Taken
    - WorkKeys Workplace Documents Taken
13. If the **Yes** button is selected for Webxam Assessment or ACT WorkKeys, additional fields display and must be completed.



YES Button	Associated Field
Webxam Assessment Taken	Webxam Score
ACT WorkKeys Applied MathTaken	Applied Math Score
ACT Workkeys Graphic Literacy Taken	Graphic Literacy Score
ACT Workkeys Workplace Documents Taken	Workplace Documents Score

14. Select Placement Status from the drop-down list.

This step is optional. However, the Placement Status field can be updated at any time by a User or Attestor and is not dependent on Program status.

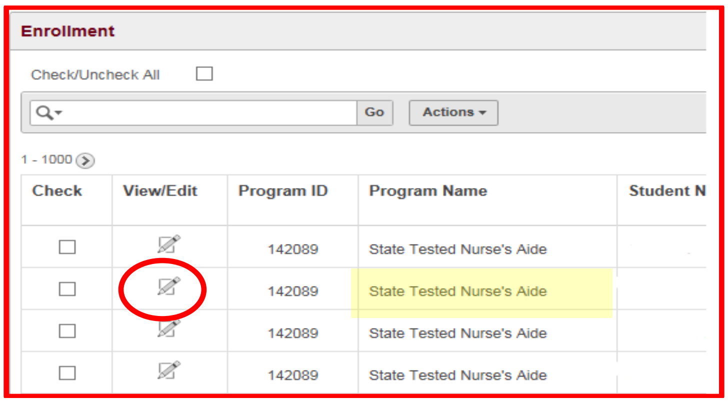
15. Click Save.

Viewing/Editing Enrollments

Student information can be viewed in the Enrollment details page and in the Student Info page. For more information, refer to the Student Info page section.

To view an enrollment:

1. Click the **DATA** tab.
2. Select the **Enrollment** link.
3. Find the Enrollment to view and click .



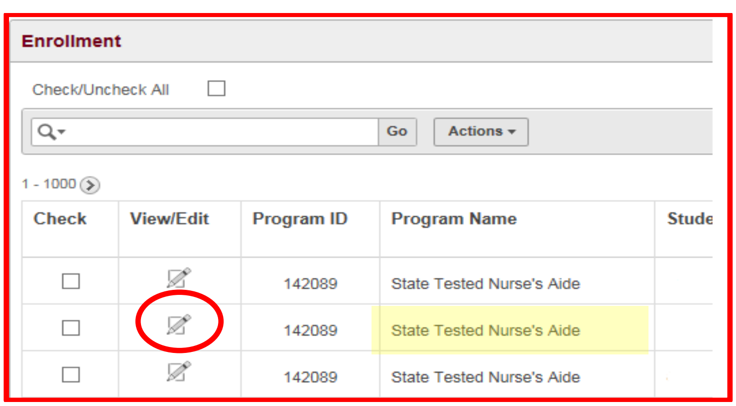
The Enrollment details page displays.

4. Click Back when finished viewing the enrollment information.

Student information is edited in the Enrollment details page.

To edit enrollments (and student information):

1. Click the **DATA** tab.
2. Select the **Enrollment** link.
3. Find the Program to edit and click .



The Enrollment details page displays. Make any necessary changes.

The fields that can be edited are the same as adding an enrollment.

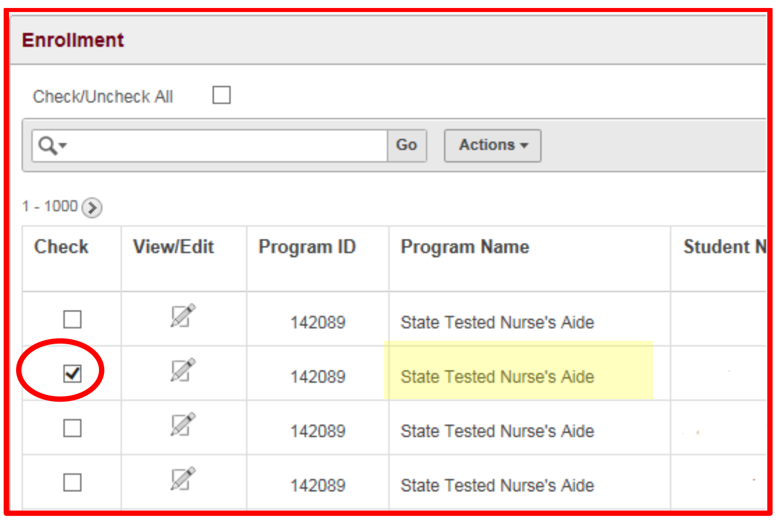
4. Click Save to keep the changes or click Back to return to the main Enrollment page.

Deleting Enrollments

Enrollments can be deleted from a Program only if a Program status is draft, ready to attest, void or rejected allowing updates.

To delete enrollments:

1. Click the **DATA** tab.
2. Select the **Enrollment** link.
3. Find the enrollment to delete and select the check box.



Multiple enrollments can be selected and deleted. Use the Check/Uncheck All check box to select or deselect all enrollments.

4. Click Delete Selected. A confirmation dialog box displays.
5. Click OK to delete the enrollment or Cancel to return to the main Enrollment page.

Uploading Enrollments

Uploading enrollments is the process of adding multiple students of multiple Program(s) in one upload. The same upload can upload enrollments for one or more than one Program. However, in order to add or upload, the Program should be in one of the following statuses:

1. Draft
2. Reject Allowing Updates
3. Void
4. Ready to Attest

Enrollment Upload Valid Values

The following table contains the valid enrollment upload values. Fields that are not required may be left blank. If the template is being edited using Microsoft Excel or another spreadsheet tool, please be sure to format the “Date of Birth” column using the date format with slashes and a 4-digit year (x/xx/xxxx).

<table>
<tr><th>Field</th><th colspan="2">Valid Values</th><th>Required</th></tr>
<tr><td>Social Security Number</td><td colspan="2">9 digits, no dashes or punctuation</td><td>No</td></tr>
<tr><td>First Name</td><td colspan="2">Up to 50 characters</td><td>Yes</td></tr>
<tr><td>Last Name</td><td colspan="2">Up to 50 characters</td><td>Yes</td></tr>
<tr><td>Date of Birth</td><td colspan="2">Date formatted MM/DD/YYYY</td><td>Yes</td></tr>
<tr><td>Gender</td><td colspan="2">M for male or F for female</td><td>Yes</td></tr>
<tr><td>FERPA Waiver On File</td><td colspan="2">Y for yes, N for no</td><td>Yes</td></tr>
<tr><td>Out of State High School</td><td colspan="2">Y for yes, N for no</td><td>Yes</td></tr>
<tr><td>Degree Type</td><td colspan="2">HS, GED, or NONE</td><td></td></tr>
<tr><td>Out of State Student</td><td colspan="2">Y for yes, N for no</td><td>Yes</td></tr>
<tr><td>High School Graduation Year</td><td colspan="2">4 digits</td><td>No</td></tr>
<tr><td>High School ACT Code</td><td colspan="2">5 digits, no dashes or punctuation</td><td>No</td></tr>
<tr><td>Race 1 Code</td><td><u>Value</u>
N
A
B
H
M
P
W</td><td><u>Race</u>
Native American
Asian
Black or African American
Hispanic or Latino
Multi
Native Hawaiian or other Pacific Islander
White</td><td>No</td></tr>
<tr><td>Program Number</td><td colspan="2">Program number, including the “dash” value if the program spans multiple fiscal years.</td><td>Yes</td></tr>
<tr><td>Hours</td><td colspan="2">Number. Up to two decimal places accepted.</td><td>Yes</td></tr>
<tr><td>Outside Hours</td><td colspan="2">Number. Up to two decimal places accepted.</td><td>No</td></tr>
</table>

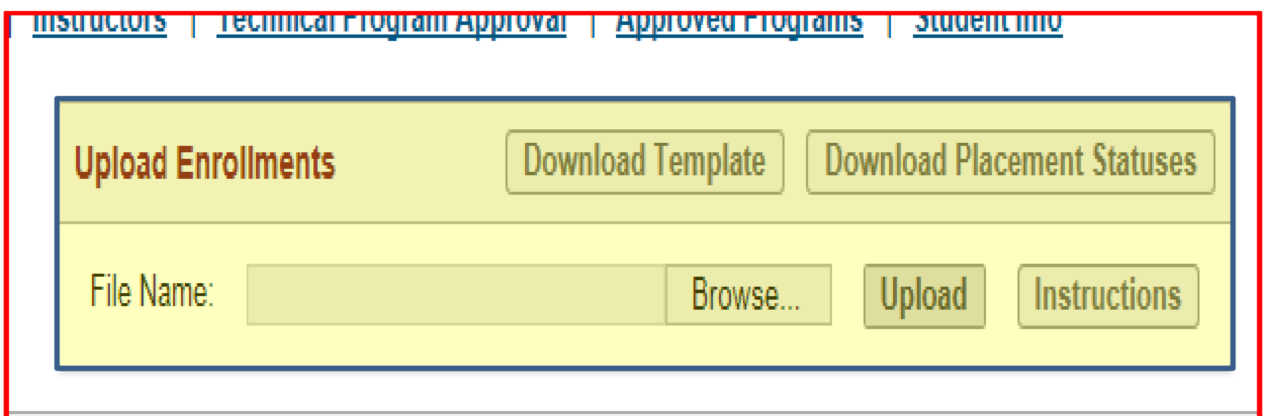
Field	Valid Values	Required
Outside Hours Type	Type **C** for **Current OTC**, **A** for **Another Ohio OTC**, **O** for **Out-of-state institution**, **I** for **In-state institution**, **R** for **Other**	No
Result Code	C for completer, N for Continuing and L for leaver	Yes
Disabled	Y for yes, N for no	Yes
Disadvantaged	Y for yes, N for no	Yes
Displaced Homemaker	Y for yes, N for no	Yes
Limited English	Y for yes, N for no	Yes
Non-Traditional	No longer used.	No
Single Parent	Y for yes, N for no	Yes
Took WEBXAM	Y for yes, N for no	Yes
WEBXAM Score	Number 0 to 100. No decimals.	Only if WEBXAM marked as taken
WEBXAM Test Key	Number. No decimals.	Only if WEBXAM marked as taken
Took WorkKeys Graphic Literacy	Y for yes, N for no	Yes
WorkKeys Graphic Literacy Score	Numbers 3 to 7	Only if WorkKeys GL marked as taken
Took WorkKeys Applied Math	Y for yes, N for no	Yes
WorkKeys Applied Math Score	Numbers 3 to 7	Only if WorkKeys AM marked as taken
Took WorkKeys Workplace Documents	Y for yes, N for no	Yes
WorkKeys Workplace Documents Score	Numbers 3 to 7	Only if WorkKeys WD marked as taken
Credential 1 Code	Credential code (see list of credentials in HEI/OTC)	No

Field	Valid Values	Required
Credential 1 Result Code	P for pass, F for fail, N for not taken	Only when Credential Code 1 present
Credential 2 Code	Credential code (see list of credentials in HEI/OTC)	No
Credential 2 Result Code	P for pass, F for fail, N for not taken	Only when Credential Code 2 present
Credential 3 Code	Credential code (see list of credentials in HEI/OTC)	No
Credential 3 Result Code	P for pass, F for fail, N for not taken	Only when Credential Code 3 present
Credential 4 Code	Credential code (see list of credentials in HEI/OTC)	No
Credential 4 Result Code	P for pass, F for fail, N for not taken	Only when Credential Code 4 present
Credential 5 Code	Credential code (see list of credentials in HEI/OTC)	No
Credential 5 Result Code	P for pass, F for fail, N for not taken	Only when Credential Code 5 present

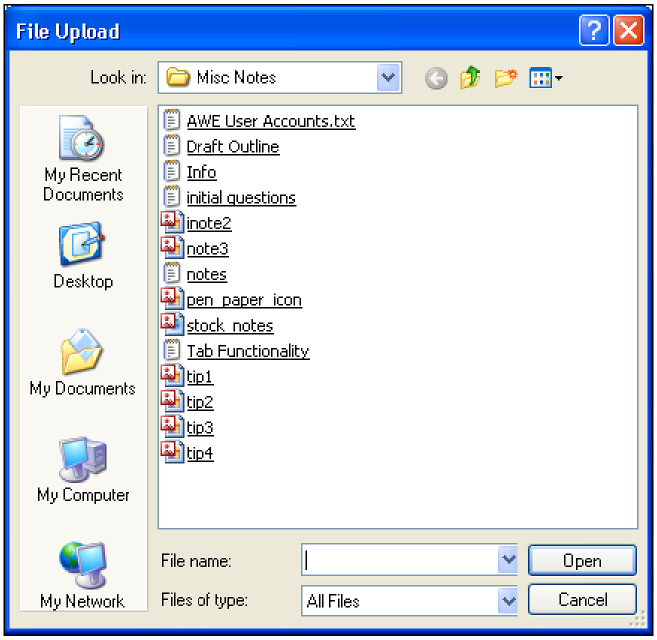
Field	Valid Values		Required
Placement Status (Employment)	**Code**	**Status**	No
	DEC	Deceased	
	ENA	Employed non-related and not pursuing additional education	
	ENN	Employed Non-related and pursuing non-related education	
	ENR	Employed non-related and pursuing related education	
	ERA	Employed Related and Not pursuing additional education	
	ERN	Employed Related and Pursuing Non-related Education	
	ERR	Employed Related and Pursuing Related Education	
	IVL	In the voluntary labor force	
	MNR	Military Non-related	
	MRE	Military Related	
	NWA	Not working but actively seeking employment	
	NWN	Not Working and pursuing non-related education	
	NWR	Not Working and pursuing related education	
	NWS	Not working and not seeking employment	
	UNK	Unknown	

To upload enrollments:

1. Click the **DATA** tab.
2. Select the **Enrollment** link.
3. At the top of the page the Upload Enrollments section displays.



4. Click 
.
5. Find the file to download, select it and click 
.

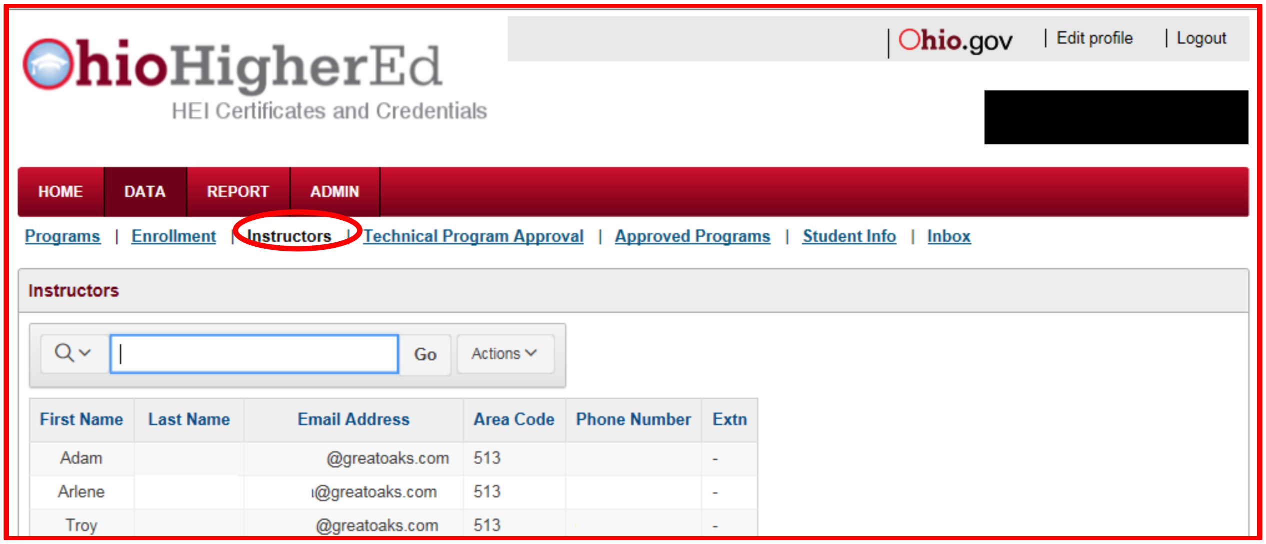


Only .csv files can be uploaded. Also, no commas should be used when uploading a file. (EX: John Doe, Sr. should be John Doe Sr)

6. Click .

Instructors Page

The Instructors page provides the ability to view the faculty that are currently available per district.



The following user roles have access to the Instructors page.

- OTC Attestor (HEI-Auth Role: Attestor)
- OTC User (HEI-Auth Role: OTC User)
- OTC Read Only User (HEI-Auth Role: OTC Read Only User)

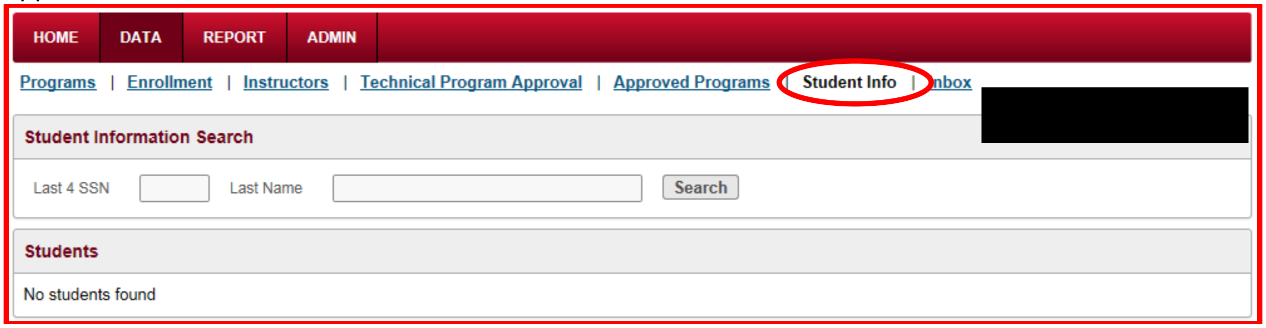
Viewing Instructors

To view instructors:

1. Click the **DATA** tab.
2. Select the **Instructors** link.

Student Information Search Page

The Student Information Search page provides a method for searching for existing students within the application.



The following user roles have access to the Student Search page:

- OTC Attestor (HEI-Auth Role: Attestor)
- OTC User (HEI-Auth Role: OTC User)
- OTC Read Only User (HEI-Auth Role: OTC Read Only User)

From the Student Information Search page, users can:

5. Search for students by the last four digits of the student's social security number or by the student's last name
6. View detailed information about a student

Searching for Existing Students

To search for existing students:

1. Click the **DATA** tab.
2. Select the **Student Info** link.
3. Enter the last four digits of the student's social security number or the student's last name.

Entering both the student's last name and the last four digits of the social security number narrows the search results. Both search criteria are not needed.

4. Click 

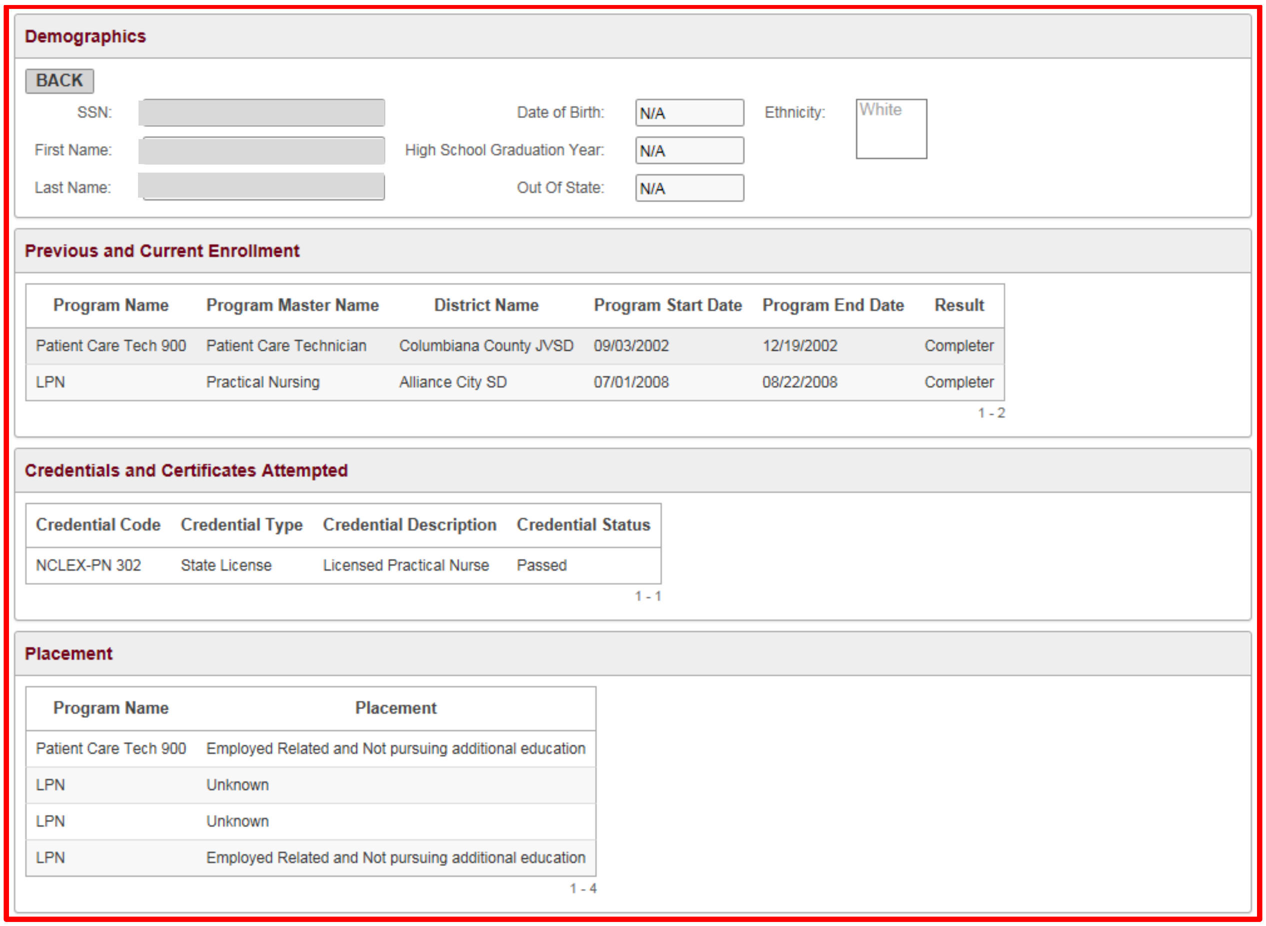
.

Viewing Student Details

Once a search for a student is performed, information about that student can be viewed including enrollments, certificates, assigned Programs and the Programs previously taken.

To view student details:

1. Click the **DATA** tab.
2. Select the **Student Info** link.
3. Enter the last four digits of the student's social security number.
4. (Optional) Enter the student's last name.
5. Click Search.
6. Click .



Demographics

BACK

SSN:		Date of Birth:	N/A	Ethnicity:	White
First Name:		High School Graduation Year:	N/A		
Last Name:		Out Of State:	N/A		

Previous and Current Enrollment

Program Name	Program Master Name	District Name	Program Start Date	Program End Date	Result
Patient Care Tech 900	Patient Care Technician	Columbiana County JVSD	09/03/2002	12/19/2002	Completer
LPN	Practical Nursing	Alliance City SD	07/01/2008	08/22/2008	Completer

1 - 2

Credentials and Certificates Attempted

Credential Code	Credential Type	Credential Description	Credential Status
NCLEX-PN 302	State License	Licensed Practical Nurse	Passed

1 - 1

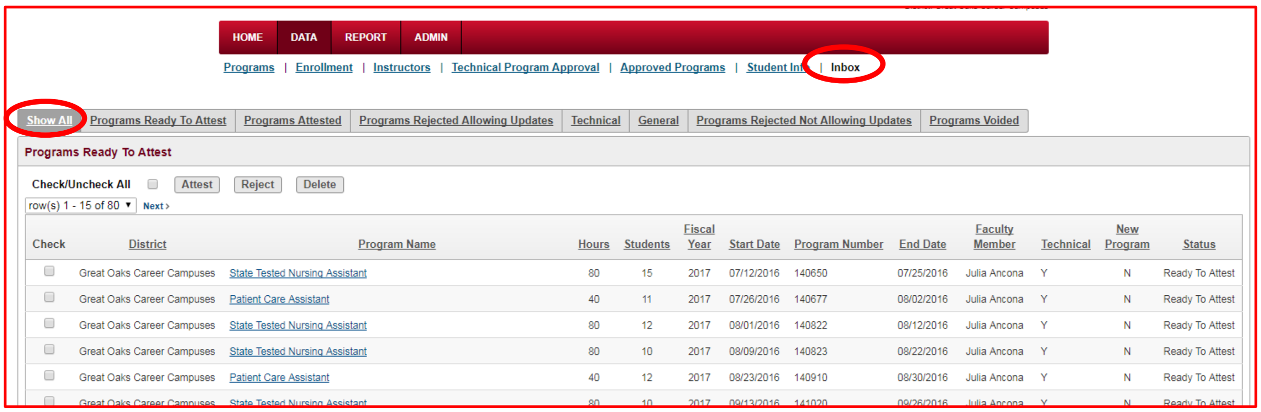
Placement

Program Name	Placement
Patient Care Tech 900	Employed Related and Not pursuing additional education
LPN	Unknown
LPN	Unknown
LPN	Employed Related and Not pursuing additional education

1 - 4

Attestor's Inbox
The Attestor's Inbox displays workload and categorizes Programs by their status. Attestor's responsibility is to Attest/Re-attest a Program.

The Attestor's Inbox displays a list of documents that are pending approval/rejection. The Attestor can select a document from this page and navigate to the Review Details page. The document listed in the Inbox will only be those documents for the user to approve or reject. Between the list of page links and the individual report areas is the "region selector". By default, all regions (reports) of the page are shown, but the user can restrict which region of the page is displayed by selecting a page area from the list.



There are three main activities that occur in the Attestor's Inbox:

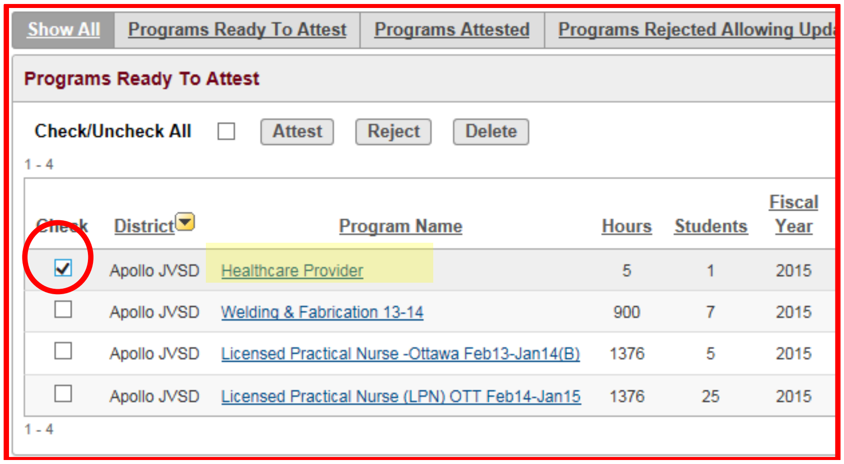
- Working with Programs (Approving, Rejecting and Deleting)
- Viewing historical information about Programs that were approved or rejected
- Making changes to voided Program

Working with Programs
When an Attestor or User creates a Program, it will always be in a *Draft* status. In order to push the *Draft* status Program into *Attested* status, a User has to go through a Ready to Attest process.
Before a Program can be "Funded," the status must be changed from Draft to Attested which is done by the User.

Attesting Programs
However, an Attestor can create a Program and directly approve that program to be Funded or Not Funded by clicking **Attest Selected**.
Attest is only available to users with the Attestor role. Attesting to the Program changes the status to *Attested*.

To attest a Program:

1. Click the DATA tab.
2. Select the Inbox link.
3. Find the Programs to attest and select the appropriate check boxes.



Multiple Programs can be selected and attested. Use the Check/Uncheck All to select all Programs.

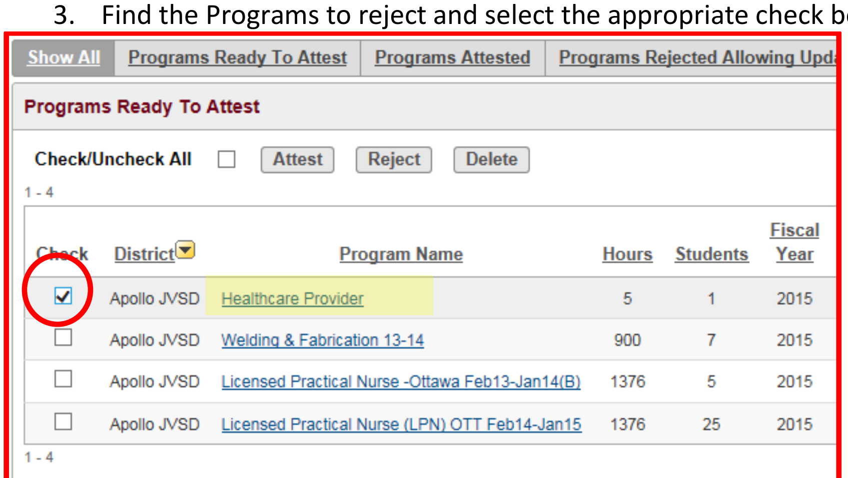
4. Click **Attest**.

Rejecting Programs

Reject is only available to users with the Attestor role. Only Ready to Attest and voided Programs can be Rejected. Once a Program is rejected, it cannot be changed to any other status.

To reject a Program:

1. Click the DATA tab.
2. Select the Inbox link.
3. Find the Programs to reject and select the appropriate check box.



Multiple Programs can be rejected. Use the Check/Uncheck All to select all Programs to reject.

4. Click **Reject**.

Deleting Programs

Only Programs with the ready to attest or void status can be deleted.

To delete a Program:

1. Click the DATA tab.
2. Select the Inbox link.
3. Find the Programs to delete and select the appropriate check box.
4. Select the Program Name hyperlink to view additional information about the Program.

Multiple Programs can be deleted. Use the Check/Uncheck All to select all Programs to delete.

5. Click Delete.

Viewing Attested Programs

Attestors can view all Programs and corresponding statuses in the Inbox including:

7. Programs ready to attest
8. General and Technical Programs
9. Rejected Programs (allowing or without updates)
10. Voided Programs

To view attested Programs:

1. Click the DATA tab.
2. Select the Inbox link.
3. Scroll down the page until the Programs Attested section displays.
4. Select the Program Name hyperlink to view additional information about the Program.

Programs Attested

1 - 1

District	Program Name	Hours	Students	Program ID	Fiscal Year	Start Date	End Date	Faculty Member	Technical	New Program	Status
Apollo JVSD	Healthcare Provider	5	2	132429	2015	10/30/2014	10/30/2014	Crystal Plumpe	N	Y	Attested

1 - 1

Viewing Rejected Programs

Once Programs have been rejected, they are displayed in the Attestor's Inbox as a historical record. Programs can be rejected allowing or not allowing updates.

Once a Program has been rejected allowing updates, the Attestor has the ability to edit and re-attest the Program.

There are three methods for rejecting Programs:

1. Rejecting a Ready to Attest Program. Done by an Attestor
2. Rejected allowing updates. Done by OTC ODHE System Administrators for Programs that they think they need more information on. This kind of rejection allows Attestors to add more information about Program and its enrollments.
3. Rejected not allowing updates. Done by ODHE System Administrators when rejecting a Technical Program. Attestors cannot change rejected Program information.

Programs Rejected Allowing Updates

Programs Rejected Allowing Updates

Check/Uncheck All ☐ Reattest Rejected

1 - 7

Edit	Check	District	Program ID	Program Name	Fiscal Year	Start Date	Faculty Member	Hours	Students	End Date	Technical	New Program	Status
	☐	Apollo JVSD	72408	Consultative -Wendy Fannin	2008	07/01/2007	System User	2	0	06/13/2008	N	N	Admin Rejected (Allowing Updates)
	☐	Apollo JVSD	71925	#2073 WELDING MIG Pulse PreTest	2008	12/20/2007	System User	1	0	12/20/2007	N	N	Admin Rejected (Allowing Updates)

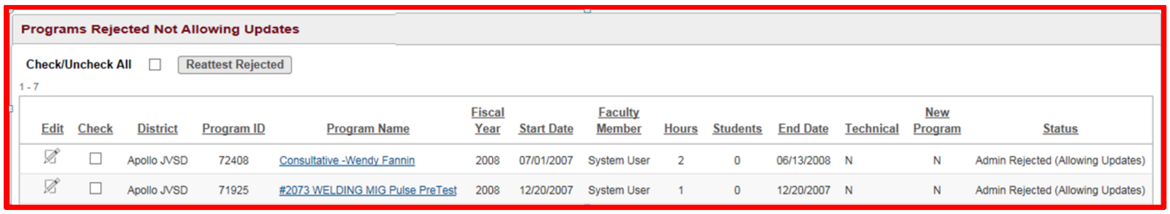
To view Programs Rejected Allowing Updates:

1. Click the DATA tab.
2. Select the Inbox link.
3. Scroll down the page until the Programs Rejected Allowing Updates section displays.
4. Select the Program Name hyperlink to view additional information about the Program.

The Program Details page contains the reason the Program was rejected at the bottom of the page, below the Student Enrollment section.

5. Click if the Program needs to be modified.
6. Make any changes as necessary.
7. Click **Reattest Rejected**.
8. Click **Save** to keep the changes or click **Back** to return to the main Attestor's Inbox page.

Program Rejected Not Allowing Updates



Programs Rejected Not Allowing Updates

Check/Uncheck All ☐ Reattest Rejected

1 - 7

Edit	Check	District	Program ID	Program Name	Fiscal Year	Start Date	Faculty Member	Hours	Students	End Date	Technical	New Program	Status
	☐	Apollo JVSD	72408	Consultative -Wendy Fannin	2008	07/01/2007	System User	2	0	06/13/2008	N	N	Admin Rejected (Allowing Updates)
	☐	Apollo JVSD	71925	#2073 WELDING MIG Pulse PreTest	2008	12/20/2007	System User	1	0	12/20/2007	N	N	Admin Rejected (Allowing Updates)

To view Programs Rejected Not Allowing Updates:
1. Click the DATA tab.
2. Select the Inbox link.
3. Scroll down the page until the Programs Rejected Not Allowing Updates section displays.
4. Select the Program Name hyperlink to view additional information about the Program.

The Program Details page contains the reason the Program was rejected at the bottom of the page, below the Student Enrollment section.

Viewing Approved Technical Programs that are "Funded"

For a Program to be "Funded," it must first receive approval as a Technical Program.

To view Funded Programs:
1. Click the DATA tab.
2. Select the Inbox link.
3. Scroll down the page until the Technical section displays.
4. Select the Program Name hyperlink to view additional information about the Program.

The students enrolled in the class are displayed at the bottom of the page.

Viewing General Programs that are Not Funded

To view Not Funded:
1. Click the DATA tab.
2. Select the Inbox link.

3. Scroll down the page until the General section displays.
4. Select the Program Name hyperlink to view additional information about the Program.

The students enrolled in the class are displayed at the bottom of the page.

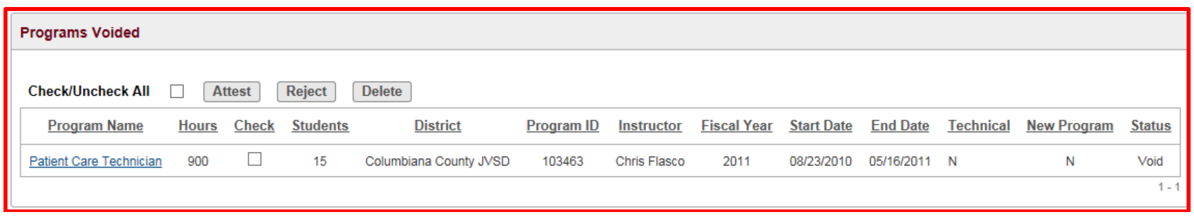
Void Programs

Programs that are already approved by ODHE/HEI ODHE System Administrators can be requested by Users to be voided. Once a Program and its enrollments are voided, the data can be changed and resubmitted for approval to ODHE System Administrators.

There are three main activities that occur in the Void Programs section of the Attestor's Inbox.

- Attest
- Reject
- Delete

Attesting a Voided Program



Programs Voided

Check/Uncheck All ☐ Attest Reject Delete

Program Name	Hours	Check	Students	District	Program ID	Instructor	Fiscal Year	Start Date	End Date	Technical	New Program	Status
Patient Care Technician	900	☐	15	Columbiana County JVSD	103463	Chris Flasco	2011	08/23/2010	05/16/2011	N	N	Void

1 - 1

To attest a voided Program:

1. Click the DATA tab.
2. Select the Inbox link.
3. Find the voided Programs to attest and select the appropriate check box.
4. Select the Program Name hyperlink to view additional information about the Program.

Multiple voided Programs can be attested. Use the Check/Uncheck All to select all Programs to attest.

5. Click Attest.

To reject a voided Program:

1. Click the DATA tab.
2. Select the Inbox link.
3. Find the voided Programs to reject and select the appropriate check box.
4. Select the Program Name hyperlink to view additional information about the Program.

Multiple voided Programs can be rejected. Use the Check/Uncheck All to select all voided Programs to reject.

5. Click 

.

To delete a voided Program:

1. Click the DATA tab.
2. Select the Inbox link.
3. Find the voided Programs to delete and select the appropriate check box.

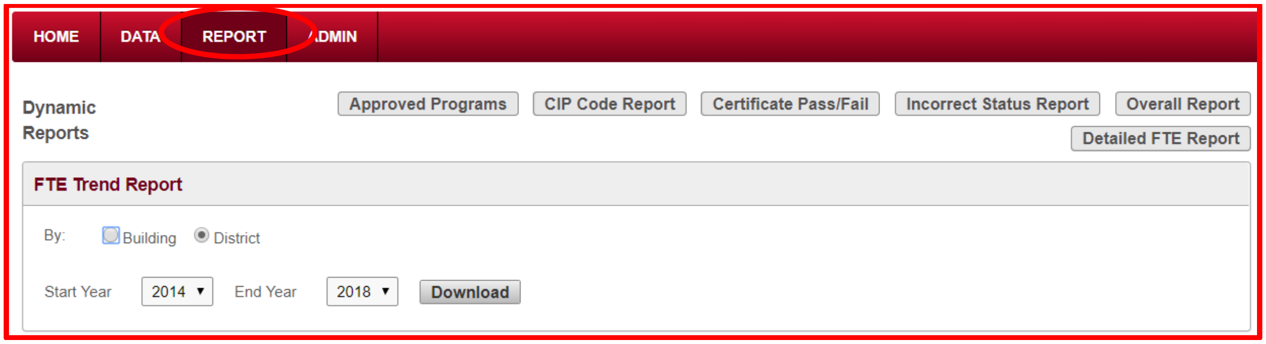
Multiple voided Programs can be deleted. Use the Check/Uncheck All to select all voided Programs to delete.

4. Click 

.

Reports

Reports are generated at the district level.



From the REPORT tab, users can:

Download dynamic reports including:

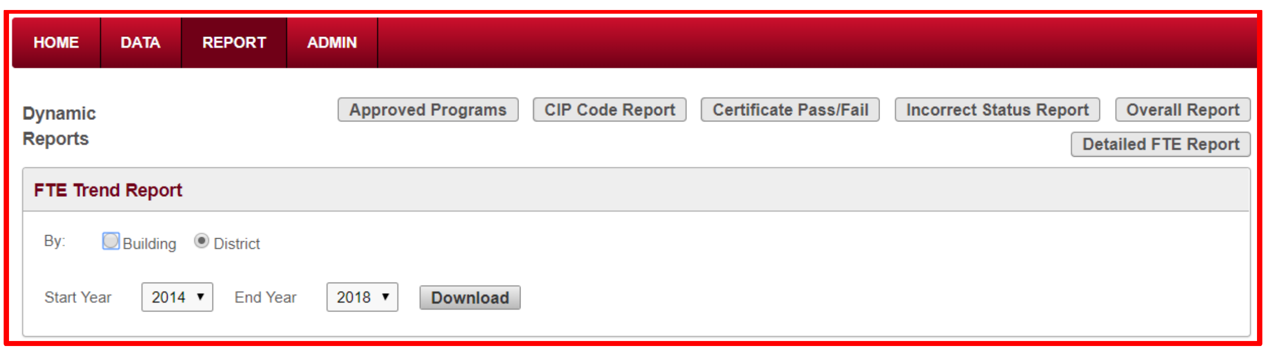
- FTE Trend Report
- Approved Programs
- CIP Code Report
- Certification Pass/Fail
- Incorrect Status Report
- Overall Report
- Detailed FTE Report

The following user roles have access to the REPORT tab:

- OTC Attestor (HEI-Auth Role: Attestor)
- OTC User (HEI-Auth Role: OTC User)
- OTC District General Staff (HEI-Auth Role: OTC Read Only User)

Report Types

The Data System produces dynamic reports. Dynamic reports are generated when a user clicks Download.



FTE Trend Report

The FTE Trend Report is a dynamic report. The report can be generated for a specific fiscal year for each OTC.

The FTE Trend Report contains the number of FTE hours generated by technical programs. The user can also select the start year and end year for the report.

FTE Trend from 2009 to 2013

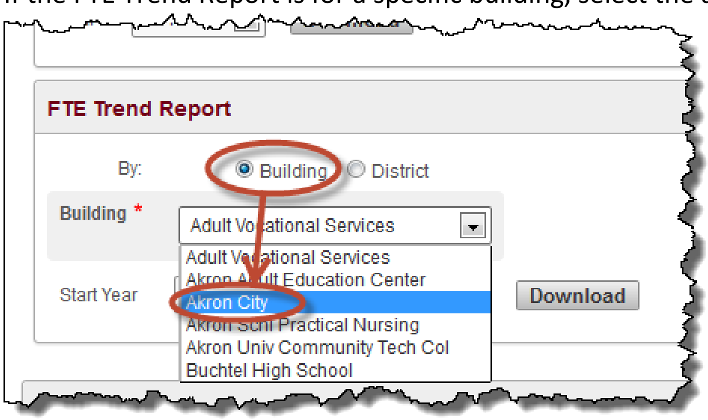
	2009	2010	2011	2012	2013
Reimbursed (FTE)	600,022.50	567,334.00	547,909.00	531,025.50	511,035.00
Non-Reimbursed (FTE)	0.00	0.00	0.00	0.00	0.00

Downloading a FTE Trend Report

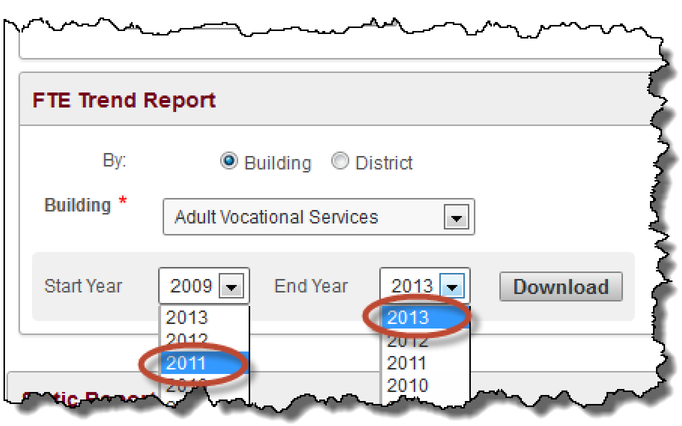
To download a FTE Trend Report:

1. Click the REPORT tab.
2. Select the Building or District radio button for the report.

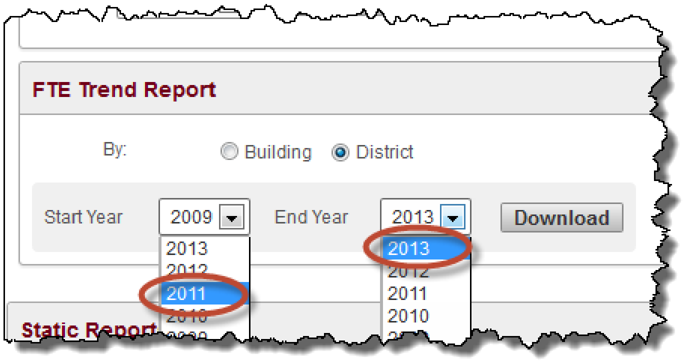
If the FTE Trend Report is for a specific building, select the appropriate one from the drop-down list.



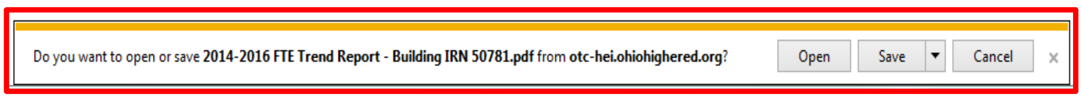
3. Select the date range from the drop-down lists.



4. If the FTE Trend Report is for a specific district, select the date range.



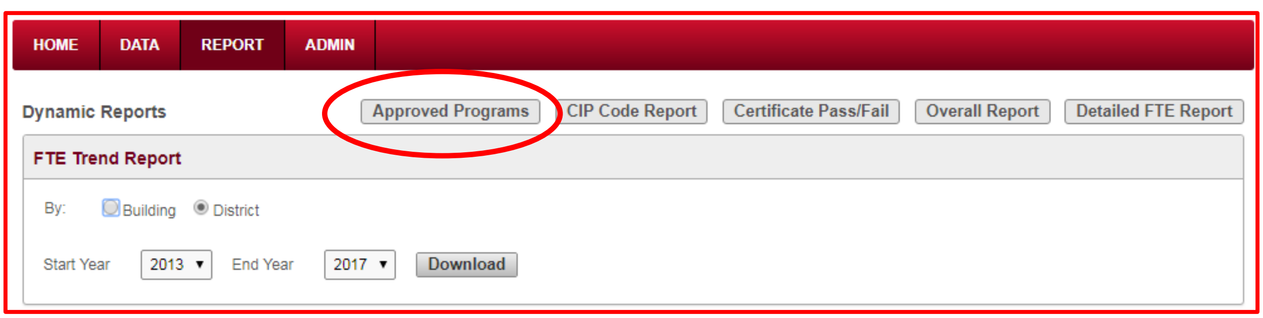
5. Select the date range for the report.
6. Click Download.
7. Select either to save the report on your local hard drive or to open the file for immediate viewing.



8. Click Open, Save or Cancel.

Approved Programs Report

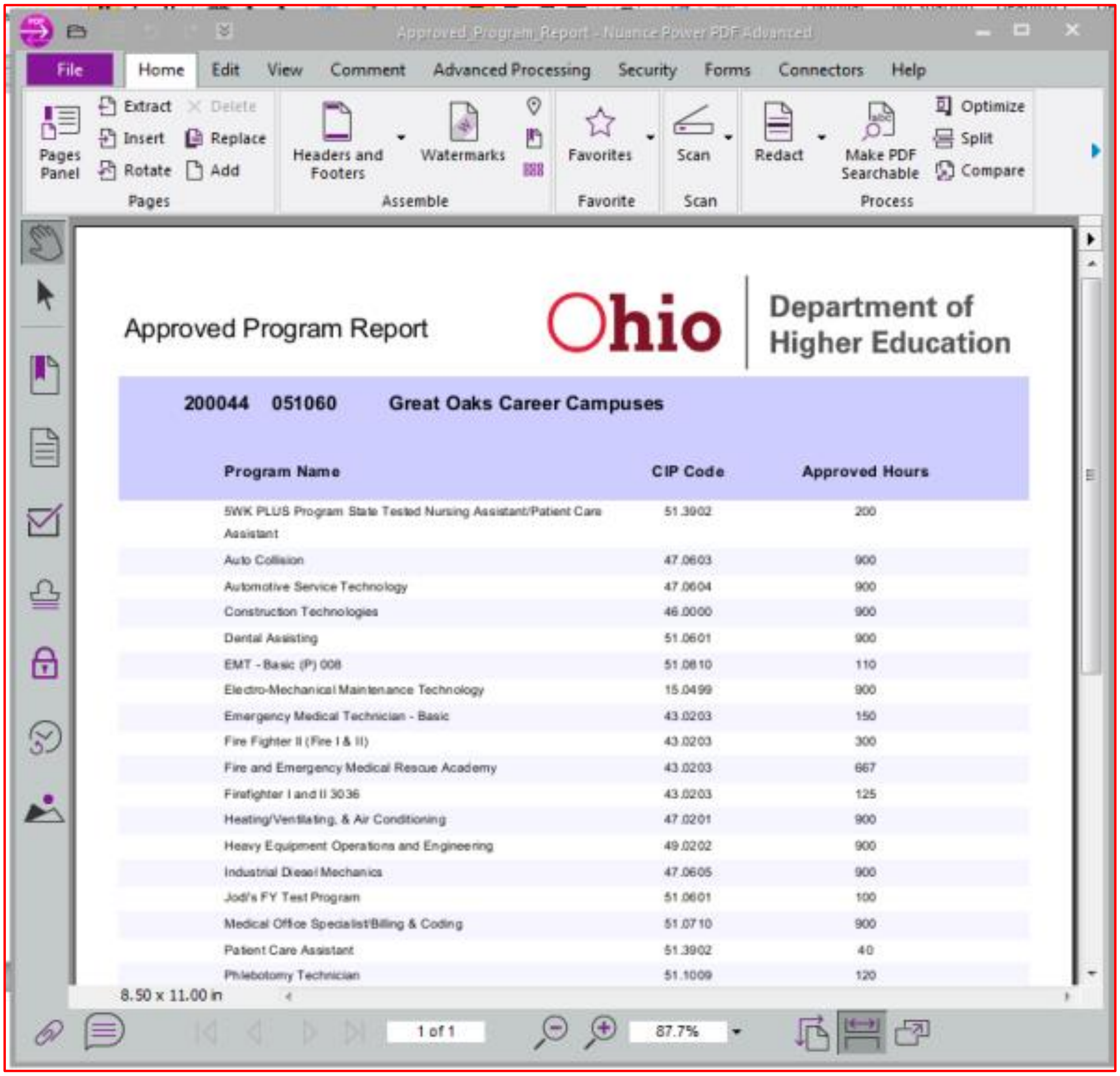
The Approved Programs Report generates a list of the current approved programs at an OTC. The report format consists of program name, CIP code and approved hours for the OTC. This report is generated as the official listing of the Ohio Department of Higher Education's Ohio Technical Center's approved technical programs.



Downloading an Approved Programs Report

To download an Approved Programs Report:

1. Click the Approved Programs button.
2. A PDF is generated with the most current list of Approved Technical Programs on ODHE letterhead.



Approved Program Report

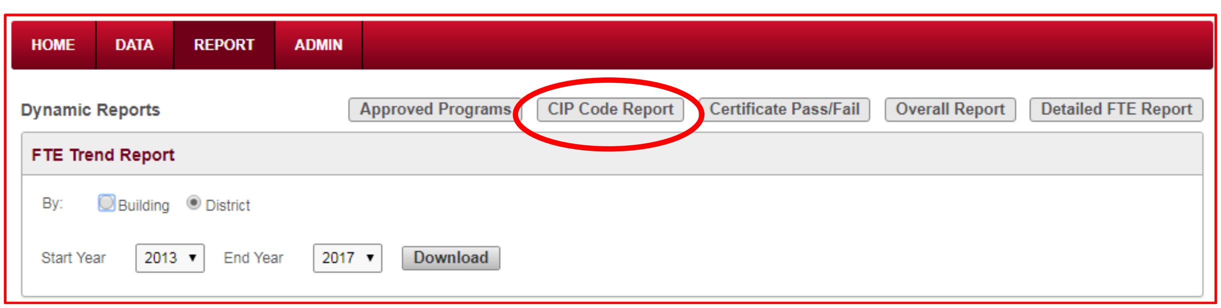
Ohio | Department of Higher Education

200044 051060 Great Oaks Career Campuses

Program Name	CIP Code	Approved Hours
SWK PLUS Program State Tested Nursing Assistant/Patient Care Assistant	51.3902	200
Auto Collision	47.0603	900
Automotive Service Technology	47.0604	900
Construction Technologies	46.0000	900
Dental Assisting	51.0601	900
EMT - Basic (P) 008	51.0810	110
Electro-Mechanical Maintenance Technology	15.0499	900
Emergency Medical Technician - Basic	43.0203	150
Fire Fighter II (Fire I & II)	43.0203	300
Fire and Emergency Medical Rescue Academy	43.0203	667
Firefighter I and II 3036	43.0203	125
Heating/Ventilating, & Air Conditioning	47.0201	900
Heavy Equipment Operations and Engineering	49.0202	900
Industrial Diesel Mechanics	47.0605	900
Jodi's FY Test Program	51.0601	100
Medical Office Specialist/Billing & Coding	51.0710	900
Patient Care Assistant	51.3902	40
Phlebotomy Technician	51.1009	120

CIP Code Report

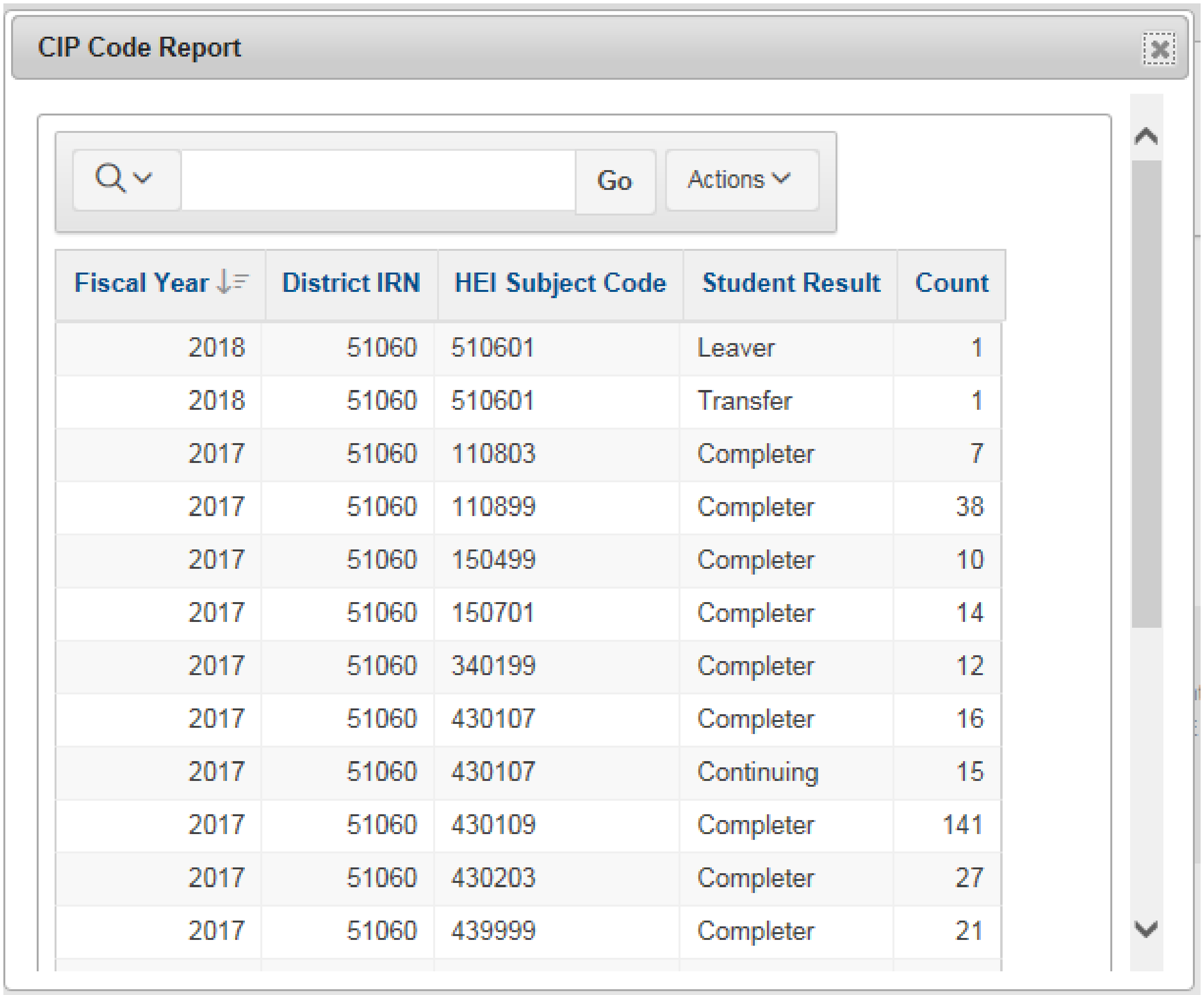
The CIP Code Report generates at table listing the fiscal year, district IRN, HEI subject code, student results and the count. This report will generated a detailed list of the number of students in the HEI subject code by student result and fiscal year.



Downloading an CIP Code Report

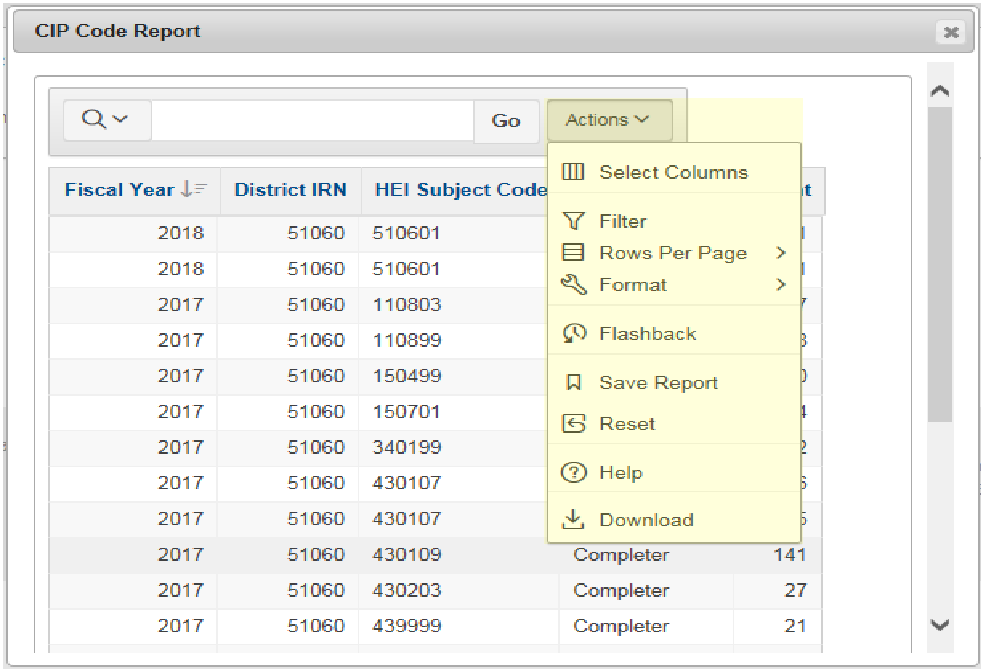
To download a CIP Code Report:

1. Click the CIP Code Report button.
2. The CIP Code Report will appear.

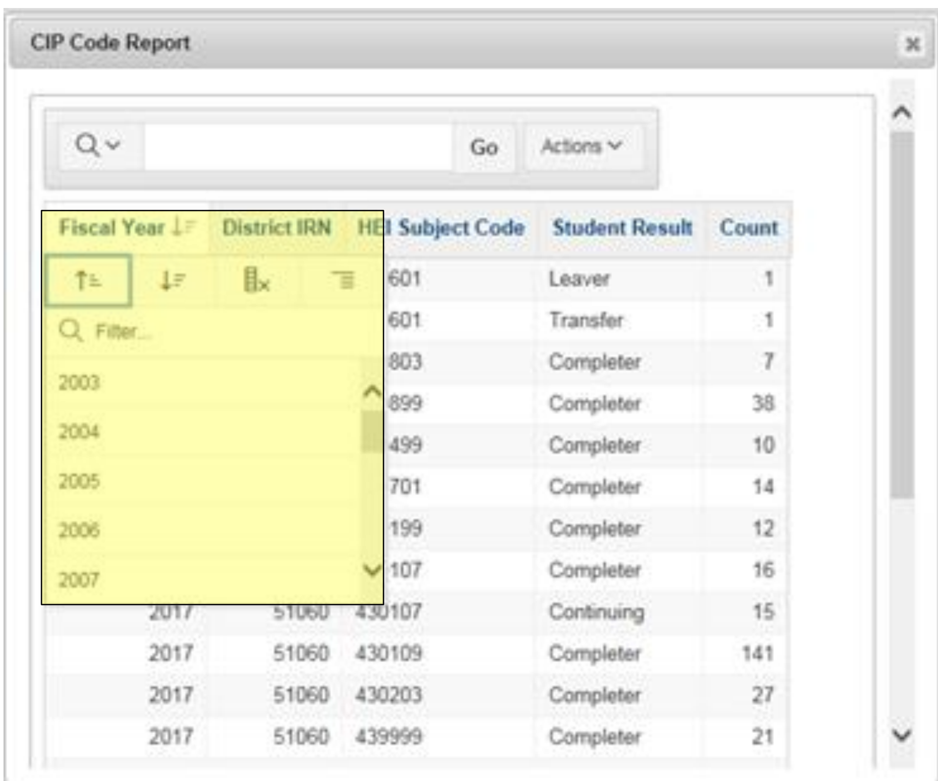


Fiscal Year	District IRN	HEI Subject Code	Student Result	Count
2018	51060	510601	Leaver	1
2018	51060	510601	Transfer	1
2017	51060	110803	Completer	7
2017	51060	110899	Completer	38
2017	51060	150499	Completer	10
2017	51060	150701	Completer	14
2017	51060	340199	Completer	12
2017	51060	430107	Completer	16
2017	51060	430107	Continuing	15
2017	51060	430109	Completer	141
2017	51060	430203	Completer	27
2017	51060	439999	Completer	21

3. Click the Actions button to retrieve detailed data.

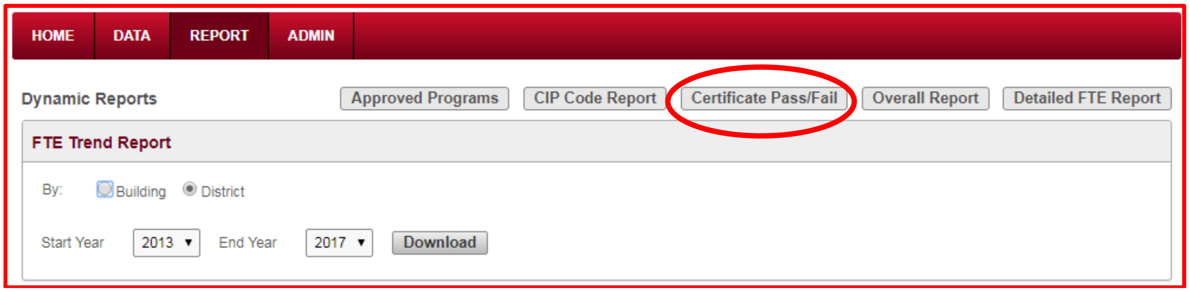


4. If you would like to define the data on the screen to a specific option(s) use each columns definitions menu to define your data.
   - Click any of the column headers



Certificate Pass/Fail Report

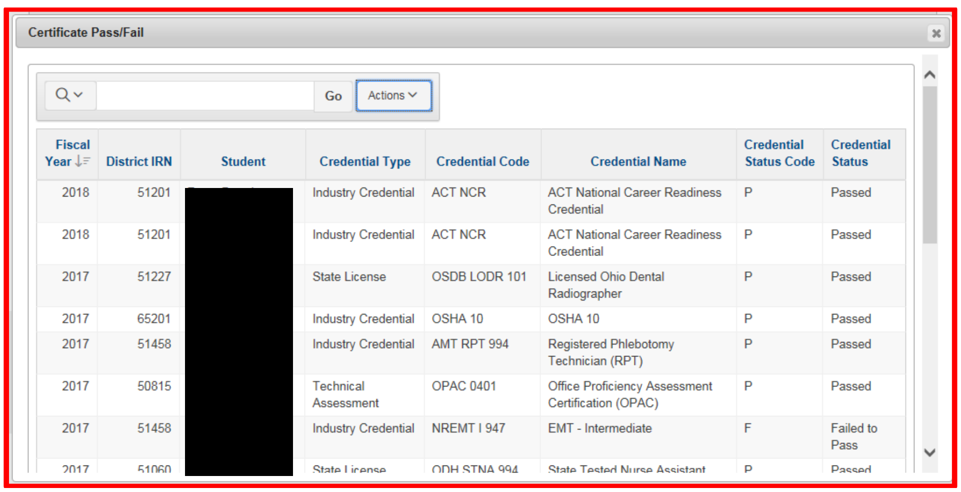
The Certificate Pass/Fail Report generates information on all credential testing that is reported into the system. It contains the fiscal year, district IRN, student name, credential type, credential code, credential name, credential status code and credential status. This report displays the pass/fail status of students that have taken a credential.



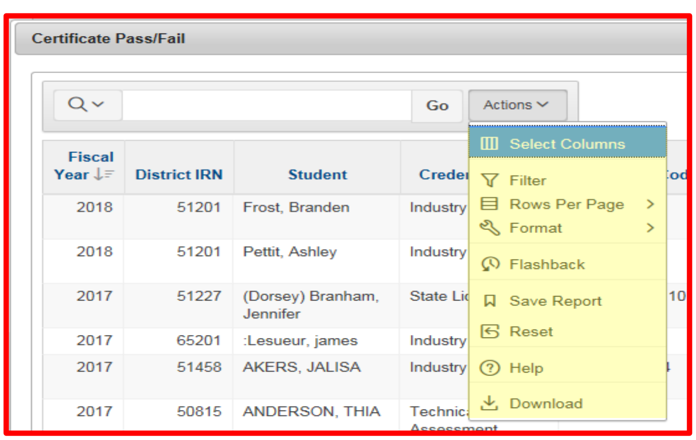
Downloading Certification Pass/Fail:

1. Click the  button

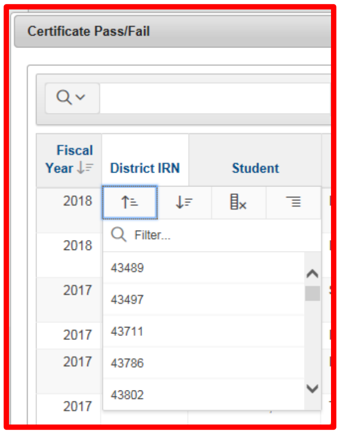
2. The CIP Code Report will appear.



3. Click the Actions button to retrieve detailed data.

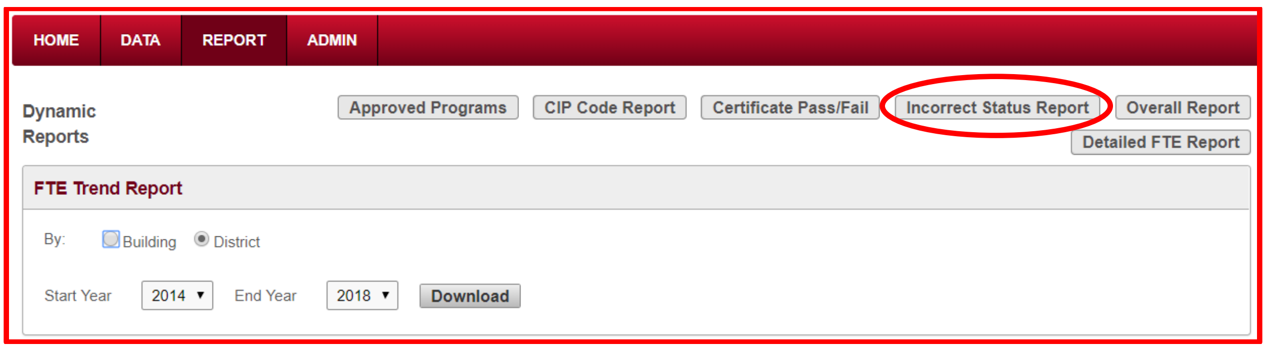


4. If you would like to define the data on the screen to a specific option(s) use each columns definitions menu to define your data.

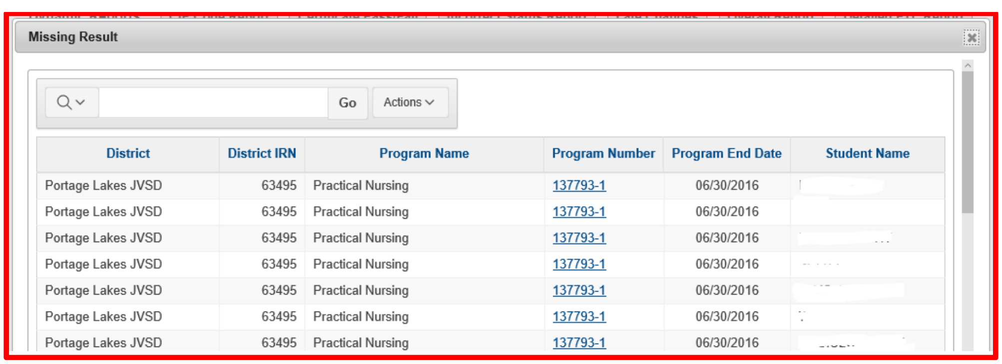


Incorrect Status Report

The Incorrect Status Report generates data for all student records that have an error on the record.



As seen in the screen shot below, the page contains six (6) columns of data. Each column represents a data element found within the system. The User can click the Program Number to view the record of the student and identify the errors in that record.



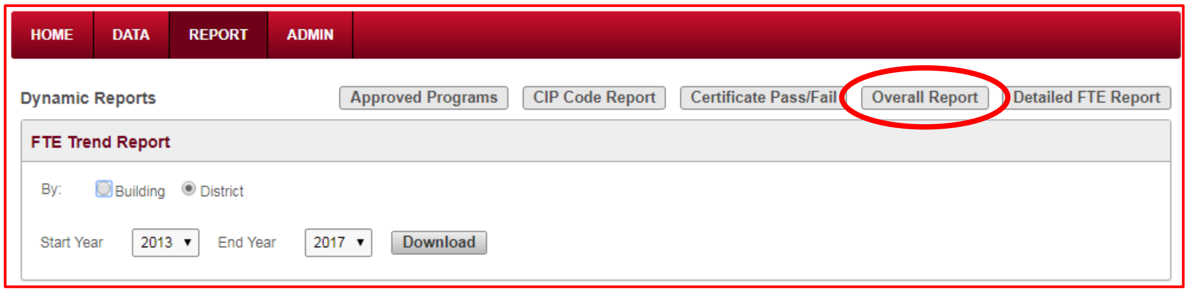
To produce reports from the Incorrect Status Report function:

1. Click the  button

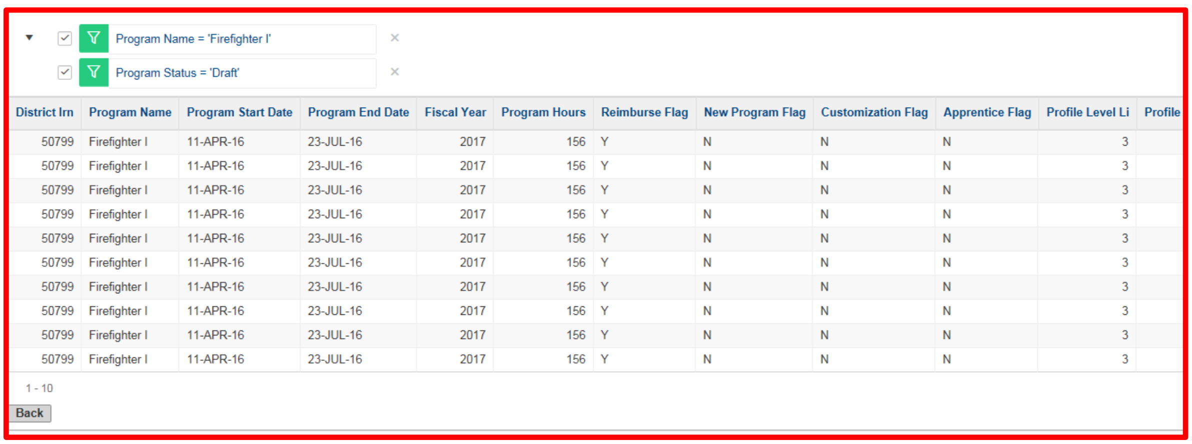
2. The Incorrect Status Report will appear.
3. Click on the Actions button to refine detailed data in the table.

Overall Report

The Overall Report generates data for all programs and fiscal years in the system.



As seen in the screen shot below, the page contains 173 columns of data. Each column represents a data element found within the system allowing you to query the entire system to define and design the results to the User's preference. The User can create their own tables, graphs and charts specific to their data needs.



Program Name = 'Firefighter I'

Program Status = 'Draft'

District Irn	Program Name	Program Start Date	Program End Date	Fiscal Year	Program Hours	Reimburse Flag	New Program Flag	Customization Flag	Apprentice Flag	Profile Level Li	Profile
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	
50799	Firefighter I	11-APR-16	23-JUL-16	2017	156	Y	N	N	N	3	

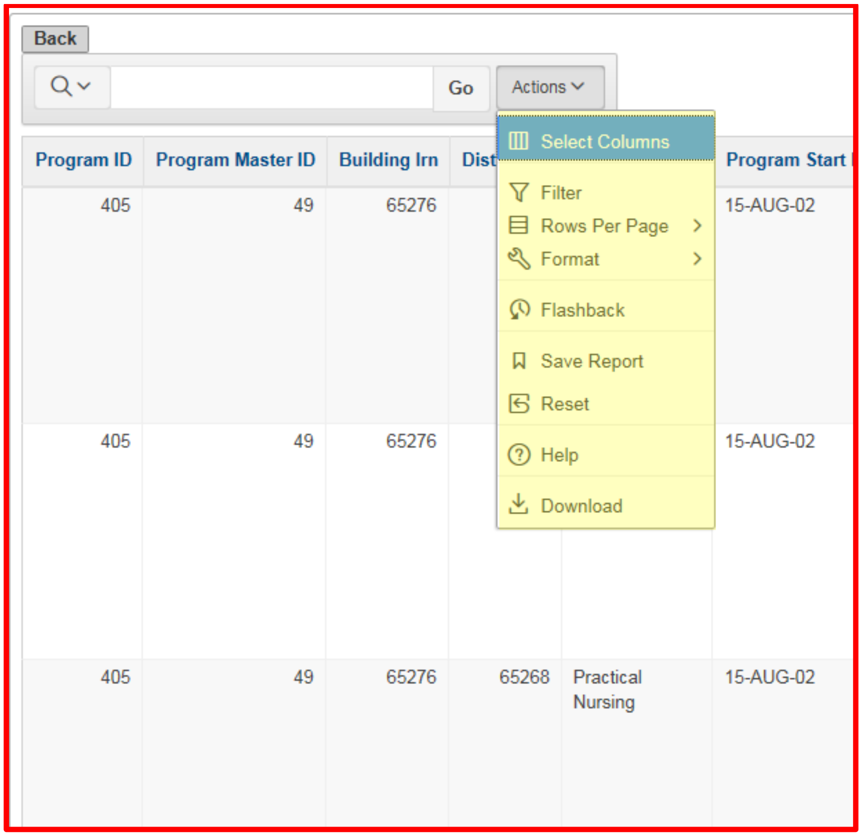
1 - 10

Back

To produce reports from the Overall Report function:

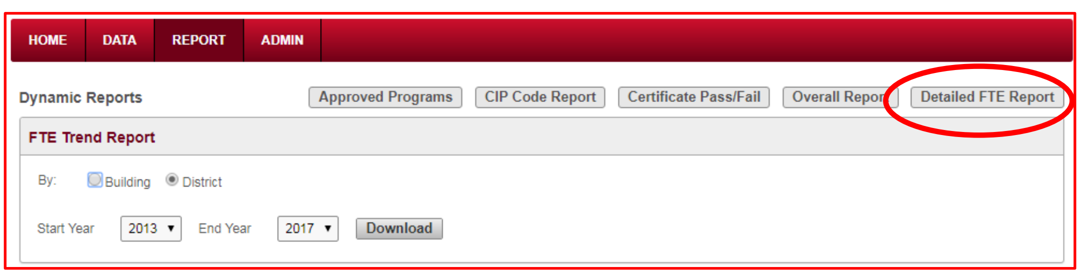
1. Click the  button

2. The Overall Report will appear.
3. Click on the Actions button to refine detailed data in the table.



4. If you would like to define the data on the screen to a specific option(s) use each columns definitions menu to define your data.
   - Click any of the column headers

Detailed FTE Report
The Detailed FTE Report generates FTE data for all programs and fiscal years in the system. It contains 52 columns of data. The columns are data elements from the Program and Enrollment tables in the system.



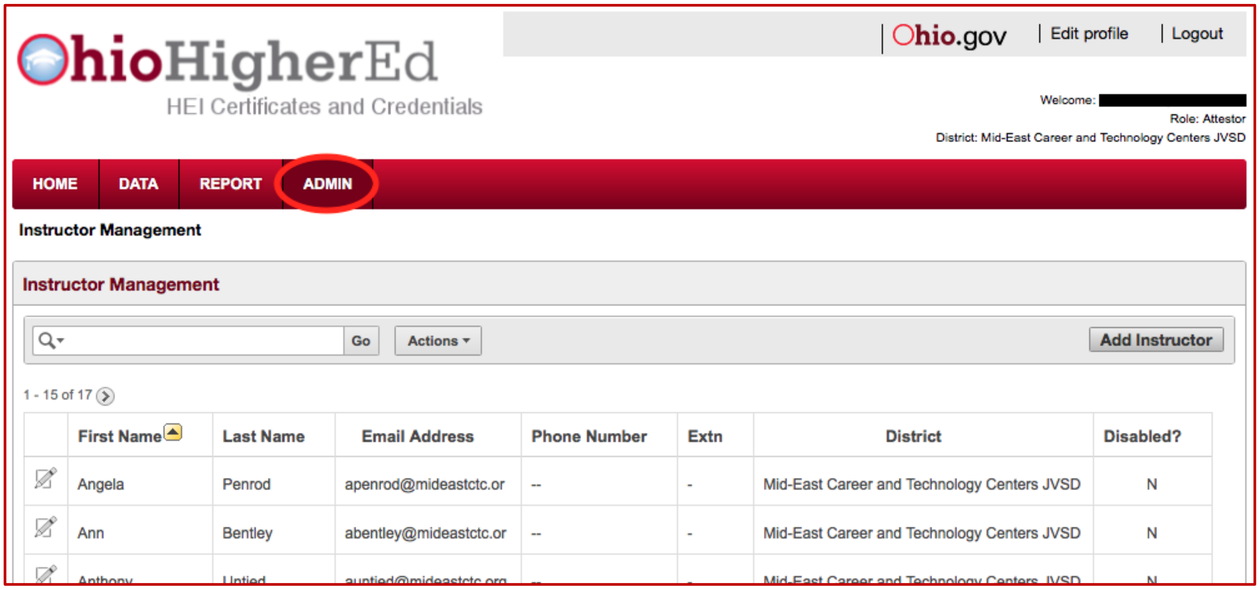
1. Click the Detailed FTE Report button
2. The Detailed FTE Report will appear.
3. Click on the Actions button to refine detailed data in the table.
4. If you would like to define the data on the screen to a specific option(s) use each columns definitions menu to define your data.
   - Click any of the column headers

Admin

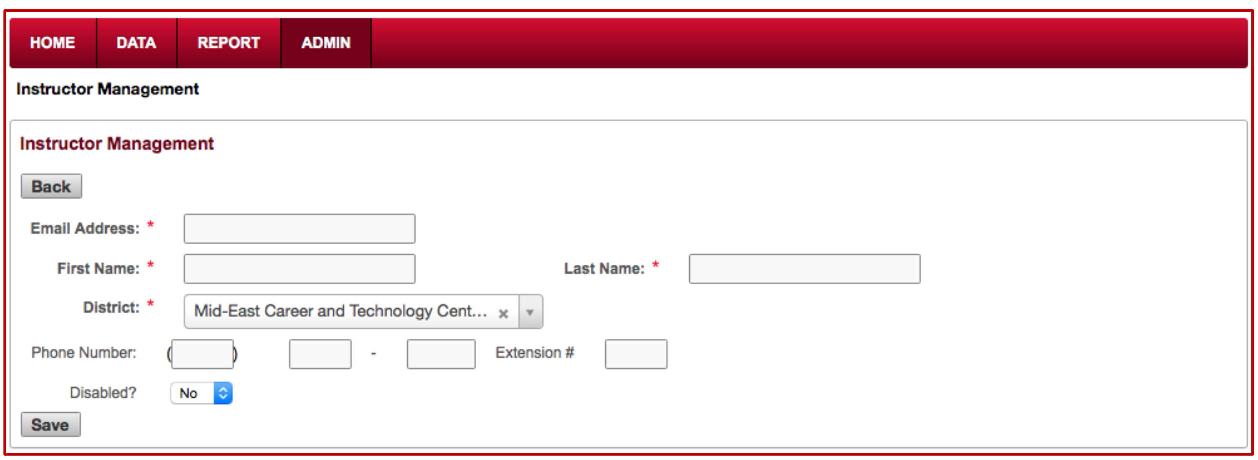
The "Admin" section allows the Attestor to add instructors or reference contact to their district, edit instructors or reference contact within their district, and disable instructors or reference contact.

Instructor Management

The Attestor, being the main point of contact for data entry at each institution, is the only individual that has access to the Admin tab. This tab enables the user to add, edit and disable instructors within the OTC application.



Adding an Instructor or Reference Contact



To add an instructor or reference contact:

1. Click ADMIN tab.
2. Click the **Add Instructor** button.
3. Enter the following information:
    - User Name
    - Email Address

- First Name
- Last Name
- Phone Number (optional)

4. Click Save or click Back to return to the main User Management page without creating a new user account.

Editing an Instructor or Reference Contact

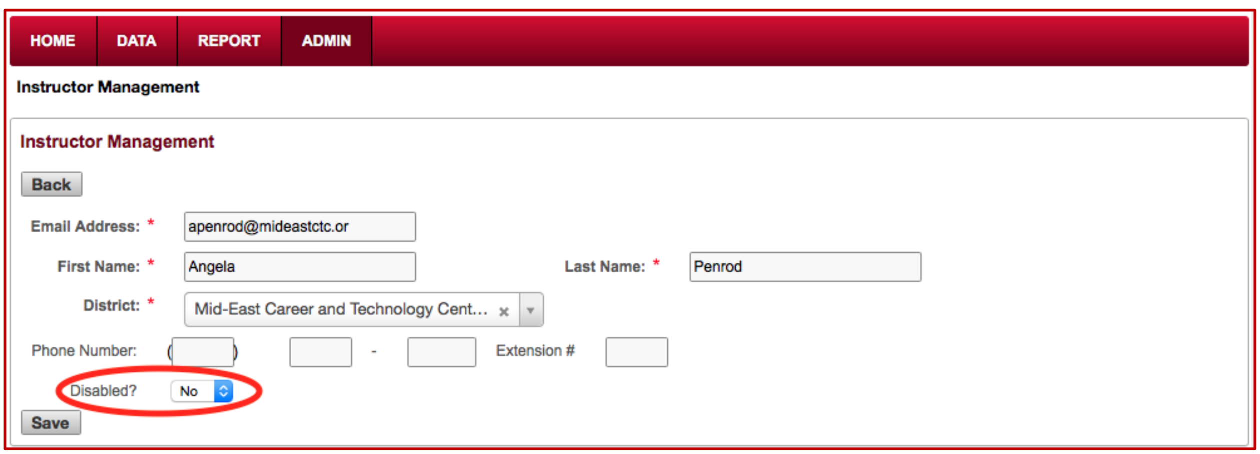
To edit an instructor:

1. Click the ADMIN tab.
2. Find the instructor to edit and click .
3. Make any necessary changes.
4. Click Save to keep the changes or click Back to return to the Instructors page.

Disabling an Instructor or Reference Contact

To disable an instructor:

1. Click the ADMIN tab.
2. Find the instructor to disable and click .



3. Set the Disabled select list to Yes.
4. Click Save to keep the changes or click Back to return to the Instructors page.

SECTION 3: DATA SYSTEM OUTPUTS

The information submitted to the HEI/OTC database by each institution is viewed as necessary to meeting the goals of each institution, the state of Ohio, and the federal government. The three key data outputs of the system are the OTC state subsidy, the Carl D. Perkins federal report (CAR), and Perkins federal subsidy. This section will focus on the core data areas of the system, primary data elements found in all three data outputs, definitions for data elements, explanations for data being extracted from the system for specific outputs, and rationale that supports data submission methodology.

PROGRAM APPROVAL, ENROLLMENT, and PROGRAM DATA

As noted in Section 1, Program Approval, Enrollment and Program data are the core data areas of the system. Essentially, the approved program information is necessary to verify programs that will be offered by institutions, enrollment information submitted into the system are the students enrolled in an OTC, and the program information is all the programs at an OTC that students are enrolled. These could be:

1. Technical Programs – Programs that prepare students for a career in a technical field; or
2. General Programs – Programs that may not lead to a career but enhances an individual's skill level.

Student enrollment and Program information should be submitted no more than two weeks after the completion of a Program. However, there is an annual deadline for submission (see data submission calendar in section 1).

CORE DATA ELEMENTS

The core data elements are the elements used to generate state subsidy, Perkins performance measures, and Perkins federal subsidy. Below are the primary data elements used for the data system's outputs:

- Completion (Completer)
- Leaver
- Continuing*(Program/student)
- Non-Traditional
- Credential**
- Employment/Placement**
- Disadvantaged (Special Populations)**

* Students in programs that cross fiscal years are automatically identified with this status in the system.
** Self-reported by students via institution's follow-up process or self-identification.

Out of the list of data elements, Completion (completer), Leaver, and Non-traditional are elements identified by the institution and based on a student's academic programs and progress once enrolled.

STATE SUBSIDY

The passing of Am Sub H.B. 59 required the Chancellor of the Board of Regents (now the Ohio Department of Higher Education), the Superintendent of Public Instruction, and the Governor's Office of Workforce Transformation to hold a series of consultations with the Ohio Technical Centers to develop an appropriate funding formula to distribute funds based on student outcomes, beginning in fiscal year 2015.

In order to develop a performance-based funding model for postsecondary workforce certificate programs for adults at the Ohio Technical Centers (OTC), the Chancellor asked Ohio Department of Higher Education staff to convene a group of stakeholders that ensured that the process was driven by the Ohio Technical Centers. This group included superintendents, adult program directors and OTC treasurers recommended by the Ohio Association of Career Technical Superintendents (OACTS) and the Ohio Association of Career Technical Education's Postsecondary Adult Career Education (ACTE PACE). The stakeholder group began meeting in Fall 2013 and also included representation from the Ohio Department of Education, the Governor's Office of Workforce Transformation and Ohio Department of Higher Education staff.

The intention of state subsidy is to offset expense of open enrollment Programs. Unless it operates like an open enrollment Program with similar tuition rates and potentially available to any student, Contract/Customized training **is not** eligible for state subsidy.

The OTC Performance Funding Consultation Group proposed that OTC subsidy allocations be disbursed through a performance-based formula beginning in FY 2015 calculated with a three-year average and based on a full-time equivalent of 450 clock hours of enrollment in an **Approved Technical Program** on four major performance metrics, retention, completion, credential, employment. The three year average is designed to allow a student that earns a credential or finds employment within three years (funding formula is based on a three year average) of being reported as a "completer" or "leaver" to be included in that category for funding for that year they are reported as such. These metrics will be:

- **Retention –** 20% shall be distributed based on each Center's full-time equivalent students who complete 50% of an Approved Technical Program as a measure of student retention.
- **Completion –** 25% shall be distributed based on each Center's full-time equivalent students who successfully complete a technical program approved by the Chancellor with a grade of C or better or grade of pass if pass/fail basis.
- **Credential –** 5% shall be distributed based on the proportion of each Center's full-time equivalent students to the total full-time equivalent students who have earned a third-party industry recognized credential (certification or license) approved by the Chancellor.
- **Employment –** 50% shall be distributed based on each Center's full-time equivalent students who have found employment, military service or additional post-secondary education and training. The calculation for eligible full-time equivalent students shall be based on students who have completed at least 50 percent of a technical program approved by the Chancellor.

Generating Full-Time Equivalents

In order to generate OTC state subsidy, Full-Time Equivalents (FTEs) based on 450 clock hours are used. These are calculated based on the number of hours a student has earned in a program. The chart below provides an example:

(Example of how FTE are generated)

STUDENT	PROGRAM	PROGRAM HOURS	FTE
A. Doe	Technical Program 1	300	.667
B. Doe	Technical Program 2	450	1
C. Doe	Technical Program 3	900	2
D. Doe	Technical Program 4	1250	2.78

Performance Funding Calculations
The following definitions, explanations and examples of how the OTC state subsidy is calculated based on data inputs within the OTC database.

RETENTION

- 20% shall be distributed based on each Center's full-time equivalent students who complete 50% of an approved program of study as a measure of student retention.

DATA SOURCE:

- This is calculated from the "Completer" and "Leaver" data. It generates FTEs of students that have completed over 50% of the Programs they were enrolled in and were marked as leavers or completers.

Example 1:
A student in a 600 hour program completed the requirements of the program.

YEAR	PROGRAM NAME	PROGRAM ID	STUDENT HOURS	PROGRAM HOURS	STATUS
2016	HVAC	001	600	600	COMPLETER
TOTAL	**HVAC**	**001**	**600**	**600**	**COMPLETER**

Example 2:
A student in a 600 hour program that left the program before completion; however, the student completed over 50% of the program to be counted in the Retention funding calculation.

YEAR	PROGRAM NAME	PROGRAM ID	STUDENT HOURS	PROGRAM HOURS	STATUS
2016	HVAC	001	450	600	LEAVER
TOTAL	**HVAC**	**001**	**450**	**600**	**LEAVER**

Example 3:
A student in a 600 hour program that left the program before completion. As you can see, they did not complete 50% of the program, so they will not be counted in the Retention funding calculation.

YEAR	PROGRAM NAME	PROGRAM ID	STUDENT HOURS	PROGRAM HOURS	STATUS
2016	HVAC	001	250	600	LEAVER
TOTAL	**HVAC**	**001**	**250**	**600**	**LEAVER**

Students identified as leavers could still be counted in the Credential and Employment/Placement calculations for funding. There are cases where students gain credentials during the program and then leave or gain employment after they leave. However, they will not be counted as a Completer, unless they return and complete the program.

<u>**COMPLETION**</u>

- 25% shall be distributed based on each Center's full-time equivalent students who successfully complete a post-secondary technical program approved by the Chancellor with a grade of C or better or grade of pass if pass/fail basis.

DATA SOURCE:

- This is calculated from the "Completer" data. It generates FTEs of students that completed Program hours.

Example:

A student in a 600 hour program completed the requirements of the program.

YEAR	PROGRAM NAME	PROGRAM ID	STUDENT HOURS	PROGRAM HOURS	STATUS
2016	HVAC	001	600	600	COMPLETER
TOTAL	**HVAC**	**001**	**600**	**600**	**COMPLETER**

<u>**CREDENTIAL**</u>

- 5% shall be distributed based on the proportion of each Center's full-time equivalent students to the total full-time equivalent students who have earned a credential from an industry recognized third party. Note: Credential portion is outside the 95% guarantee

DATA SOURCE:

- This is calculated from the "Credential" data. It generates FTEs of students that received a credential. If the student has received multiple credentials that are associated with the program, the formula will only calculate one (1) credential.

<u>**EMPLOYMENT**</u>

- 50% shall be distributed based on each Center's full-time equivalent students who have found employment, military service or additional post-secondary education and training.

DATA SOURCE:

- This is calculated from "Employment/Placement" data. It generates FTEs of students that gained employment or seeking further education. It generates FTEs of students that have completed over 50% of the Programs they were enrolled in and were marked as leavers or completers.

Calculations for Programs that Cross Fiscal Years

An OTC program can be offered during a single fiscal year or over multiple fiscal years. The institution makes this choice. If an institution chooses to offer a program over multiple fiscal years, this might affect how and when funding is calculated and allocated for the institution.

Below are a few examples depicting how funding is calculated for programs that cross fiscal years.

Example 1:

A student in a 2000 hour program that spans three fiscal years completed the requirements of the program. Here, the student started the program in FY 2014 and completed it in FY 2016. Once the institution selects this student as a "Completer," the system begins to add all student hours for a total. Since the student completed 2000 hours in a 2000 hour program, the student will be counted in the

Retention funding for meeting the 50% program completion threshold as well as the Completion funding category for completing all program requirements.

YEAR	PROGRAM NAME	PROGRAM ID	STUDENT HOURS	PROGRAM HOURS	STATUS
2014	HVAC	001	500	2000	Continuing (Transfer)
2015	HVAC	001	500	2000	Continuing (Transfer)
2016	HVAC	001	1000	2000	COMPLETER
TOTAL	**HVAC**	**001**	**2000**	**2000**	**COMPLETER**

Example 2:
A student in a 900 hour program that spans two fiscal years left the program. Still, this student completed at least 50% of the program, which places them in the Retention funding portion of the formula.

YEAR	PROGRAM NAME	PROGRAM ID	STUDENT HOURS	PROGRAM HOURS	STATUS
2015	HVAC	001	500	900	Continuing (Transfer)
2016	HVAC	001	200	900	LEAVER
TOTAL	**HVAC**	**001**	**700**	**900**	**LEAVER**

Example 3:
A student in a 600 hour program that spans two fiscal years left the program. In this scenario, the student will not be counted for Retention. However, if they earned a credential, they could be counted. Unfortunately, if they do gain employment, they will not be counted because they must complete at least 50% of their program to be counted for employment/placement funding.

YEAR	PROGRAM NAME	PROGRAM ID	STUDENT HOURS	PROGRAM HOURS	STATUS
2015	HVAC	001	250	600	Continuing (Transfer)
2016	HVAC	001	20	600	LEAVER
TOTAL	**HVAC**	**001**	**270**	**600**	**LEAVER**

In programs that cross fiscal years, funding is calculated when an institution identifies a student as a “Leaver” or a “Completer.” In the examples above, the “Status” column shows if someone is “Continuing.” Although the student generated hours, those hours are not calculated until the student is identified as a “Leaver” or “Completer.”

All calculations for OTC subsidy funding are based on a three year average. It is understood by ODHE that all students may not immediately receive their credential or gain employment after program completion. However, the OTC database system is a longitudinal database and can connect those accomplishments with a student’s program completion record. Still, institutions wanting to receive funding for credential and employment data must submit this information within three years of their program completion.

Subsidy Schedule
All subsidy allocations are based on a three year average. Please check the ODHE website to view the subsidy distribution calendar and the fiscal year data used for the subsidy three year average.

PERKINS ACCOUNTABILITY and FUNDING FORMULA
The Carl D. Perkins Act of 2006 (Perkins IV) was signed into law by the President on August 12, 2006 to provide an increased focus on the academic achievement of career and technical education students, strengthen the connections between secondary and postsecondary education, and improve state and local accountability.

Annually, states must provide a report to the United States Department of Education (USDOE), Office of Career, Technical, and Adult Education (OCTAE) providing information on enrollment and performance. This report is known as the Consolidated Annual Report (CAR). The state report is generated based on the Program and enrollment data submitted by institutions through the HEI/OTC database.

Perkins Core Indicators
With accountability being a key piece of Perkins legislation, a prescribed set of Perkins Core Indicators were established through a set of consultations with states to work toward a standardized format for data collection. For Postsecondary institutions, colleges and for those states with Adult career technical programs like Ohio, Perkins legislation established five core indicators for performance. These indicators are as follows:

- Technical Skill Attainment
- Completion (Credential, Certificate, or Degree)
- Retention and Continuing
- Placement
- Non-Traditional Participation and Completion

Performance Measures

The legislation establishes definitions to be used for each indicator in order to measure performance (see Appendix 5). However, it is up to states to ensure they can collect or use current database system elements that are aligned or closely aligned to the Perkins Performance Measure definitions.

The following are data definitions and approaches used to meet Perkins Performance Measure requirements. Also, there is information specific to the types of data elements used by OTCs in order to meet performance measure definitions, as well as the source for this information.

PARTICIPANT AND CONCENTRATOR DEFINITIONS

PARTICIPANT: An OTC student that has completed a minimum of 10% of an Approved Technical Program.

CONCENTRATOR: An OTC student that has completed 20% of an Approved Technical Program.

The Perkins Participant and Concentrator definitions determine how institutions count Perkins students. Students at an OTC can be enrolled in an Approved Technical Program but will not be considered a part of Perkins until they have completed at least 10% of their program requirements. At that point, they will be considered a Participant. For Concentrator status, they must meet the 20% threshold.

Perkins Participation and Concentration does not mean that only these students can benefit from the innovation, support, and funding that the Perkins grant might provide. Perkins funding is allocated based on an eligible institution's concentrators. The funding is not a direct benefit to students (i.e., Pell, scholarships, loans, etc.), but provides funding for student support services (i.e., instructors, equipment, advisors, etc.) offered by the institution.

1A1 – TECHNICAL SKILL ATTAINMENT

NUMERATOR: Concentrators who left Approved Technical Programs in the reporting year and **Passed** a **state recognized technical skills assessment**.

DENOMINATOR: Concentrators who left Approved Technical Programs in the reporting year and **Passed** or **Failed to Pass** a **state recognized technical skills assessment**.

The Perkins Technical Skill Attainment measure is looking at concentrators in both the numerator and denominator, and identifying if these students were able to receive their credential or failed to obtain one based on whether they passed or failed their credential examinations. The chart below provides a view of the credential section found within the data system. This is the area where institutions must choose the student's credential status. Only those selected as "Passed" or "Failed to Pass" will show up in this measure. If the credential was offered and the student did not take it, then they would not show up in this particular measure.

Credential Name	Credential Code	Credential Type	Credential Status
ABC Carpentry	ABC C 1011	Industry Credential	Not Taken Passed Failed to Pass
ABC Electrical	ABC E 1011	Industry Credential	
ABC HVAC	ABC HVAC 1011	Industry Credential	Not Taken

2A1 – CREDENTIAL, CERTIFICATE, OR DEGREE

NUMERATOR: Concentrators who left Approved Technical Programs in the reporting year and **Passed** a **state recognized technical skills assessment**.

DENOMINATOR: Concentrators who left Approved Technical Programs in the reporting year and **Passed** or **Failed to Pass** a **state recognized technical skills assessment**; or completed an Approved Technical Program without an industry credential associated with it; or dropped out of the program.

The Credential, Certificate, or Degree measure is sometimes referred to as the completion measure; however, it's looking specifically at those students who received their credential after passing their credential examination. This does not take into account all the students who completed a program that wasn't associated with a credentialing exam. Moreover, the denominator population includes all those who passed and failed to pass like 1A1's denominator. Yet the difference is its inclusion of everyone in programs that did not have an industry credential attached and those who might have dropped out before completing their program.

Similar to 1A1, this measure pulls information from the selection of credential status found in the program area as seen on the "Credential Status" chart above.

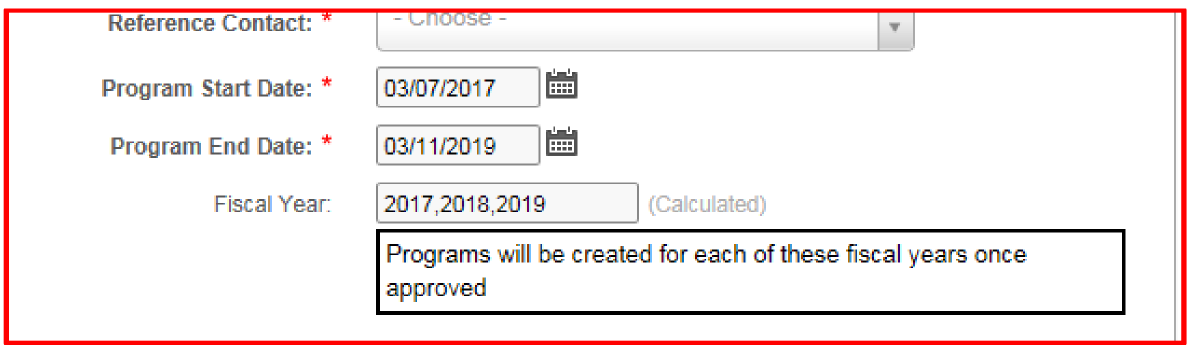
3A1 – STUDENT RETENTION OR TRANSFER

NUMERATOR: Concentrators in the previous year that were enrolled in an Approved Technical Program that crosses fiscal years and in the reporting year either continued, completed, or left the program.

DENOMINATOR: Concentrators in the previous year that were enrolled in an Approved Technical Program that crosses fiscal years.

Since OTC programs are not designed for students to seamlessly transfer from one OTC or college to another, the Student Retention or Transfer measure is really looking at students who continued in their program from one fiscal year to the next, based on the program's duration. The measure looks at the previous fiscal year and connects with the current fiscal year to determine if students previously enrolled continued into the current fiscal year either leaving their program before finishing or completing their program to obtain their credential.

This data is generated based on institutions correctly inputting the program start and end date into the system. If the program crosses fiscal years, the Fiscal Year box will show the number of fiscal year associated with the program. The system then generates a program ID that will be associated with students who leave or complete.



4A1 – STUDENT PLACEMENT

NUMERATOR: Concentrators who left an Approved Technical Program the previous year and were reported as 1 – 10 on the Post Program Placement Chart.

DENOMINATOR: Concentrators who left an Approved Technical Program the previous year and were reported as 1 – 13 on the Post Program Placement Chart.

The Student Placement measure is specific to students who were employed at least 6 months after program completion, are in the military, or in apprenticeship programs. As you can see from the Post Program Placement Chart areas 1-10 meet this criteria. Of course, apprenticeship is only captured based on the programs identified as such during program approval. Students in these programs would be included in the count too.

This is calculated from "Employment/Placement" data below. The Program Placement Chart outlines the specific numbers 1-13 that are pulled for the measure. The Fiscal Year Employment Quarters provides the months included for each quarter in the Fiscal Year. The 2nd Quarter is noted in this measure.

Post Program Placement Chart

1. MRE – Military Related
2. MNR – Military non-related
3. ERR – Employed related and pursuing related education
4. ERN – Employed related and pursuing non-related education
5. ERA – Employed related and not pursuing additional education
6. ENR – Employed non-related and pursuing related education
7. ENN – Employed non-related and pursuing non-related education
8. ENA – Employed non-related and not pursuing additional education
9. NWR – Not working and pursuing related education
10. NWN – Not working and pursuing non-related education
11. NWA – Not working but actively seeking employment
12. NWS – Not working and not seeking employment
13. IVL – In the voluntary labor force
14. UNK – Unknown

97. DEC – Deceased

Fiscal Year Employment Quarters

July, August, September	–	1st Quarter
October, November, December	–	2nd Quarter
January, February, March	–	3rd Quarter
April, May, June	–	4th Quarter

5A1 – NON-TRADITIONAL PARTICIPATION

NUMERATOR: Participants in an Approved Technical Program in the reporting year that are identified as females or males in a nontraditional CTE program.

DENOMINATOR: All Participants in an Approved Technical Program in the reporting year that are identified as a nontraditional CTE program.

5A2 – NON-TRADITIONAL COMPLETION

NUMERATOR: Concentrators in an approved technical program in the reporting year that completed their program and identified as females or males in a nontraditional CTE program.

DENOMINATOR: All Concentrators in an Approved Technical Program in the reporting year that completed their program and identified as females or males in a nontraditional CTE program.

The Non-Traditional Participation and Completion measures are pulling information from the non-traditional criteria selected by the institution based on the students' status during enrollment. Also, non-traditional occupation is determined from national Field of Work List developed by the National Alliance for Partners in Equity (NAPE).

Perkins Enrollment

Perkins institutions are also responsible for providing enrollment information on the students and programs being measured for performance. Enrollment is based on the "Participant" and "Concentrator" definitions. Participant information provides a headcount of all students in technical Programs that meet the participant definition. Participants are calculated and reported by:

- Gender
  - Male
  - Female
- Race/Ethnicity
  - American Indian or Alaskan Native
  - Asian
  - Black or African American
  - Hispanic/Latino
  - Native Hawaiian or Other Pacific Islander
  - White
  - Two or More Races
  - Unknown
- Special Populations
  - Individuals With Disabilities (ADA)
  - Economically Disadvantaged
  - Single Parents
  - Displaced Homemakers
  - Limited English Proficient
  - Nontraditional Enrollees

Concentrator information provides a headcount of all students in technical Programs that meet the concentrator definition. Concentrators are calculated and categorized by Program into the following program areas:

- Agricultural Education
- Business Education
- Family & Consumer Science
- Health Careers
- Marketing Education
- Public Safety Services
- Industrial & Engineering
- Adult Workforce Education
- Mental Health Education

PERKINS FEDERAL SUBSIDY

The Ohio Technical Centers (OTC) Perkins funding formula is based on students flagged as disadvantaged by the institution and completed at least 20% of a technical Program (i.e., leads to technical certificate or industry-recognized credential). FTE are generated according to the number of hours completed by these disadvantaged students.

For the Perkins subsidy distribution, "Disadvantaged" is described as:

- Economically Disadvantaged
- Individuals with disabilities
- Non-Traditional
- Single Parents
- Displaced Homemakers
- English Language Learners/Limited English Proficient

PERKINS FUNDING FORMULA

1. Institution's Disadvantaged FTEs ÷ statewide total of Disadvantaged FTEs = Institution's statewide % of Disadvantaged FTEs.
    - **EXAMPLE:** Ohio Technical Center – 635 FTE ÷ 7453 Total FTE = 8.52%

2. Institution's statewide % of Disadvantaged FTEs * the state's Perkins allocation amount = Institution's Perkins allocation.
    - **EXAMPLE:** Ohio Technical Center – 8.52% * $3,547,845 = $302,276.39

The Perkins Formula and Its Fluctuating Nature

The Perkins Formula isn't the easiest formula for consistency from year to year. The fate of each institutions Perkins dollars relies on the number of disadvantaged FTEs an institution can generate.

For example, an institution can gain in enrollment, increase the number of available programs, and offer these programs at higher FTEs, yet this success doesn't necessarily translate into higher numbers of disadvantaged FTEs in eligible programs.

Also, if an institution had 450 disadvantaged FTEs last year it doesn't mean they will have the same number this year. The institution could easily drop to 250, which could possibly put them in jeopardy of falling out of the program simply based on the success of other institutions gaining more disadvantaged FTEs. A drop from 450 to 250 can be realized by programs with less clock hours or programs with more clock hours. Ultimately, if students who are flagged as disadvantaged were in these programs the previous year but not in them the following year, this type of decrease is a reality.

SECTION 4: DATA SYSTEM RULES & CHECKS

Since June 2015, the ODHE has provided guidance to OTC data Users specific to various data checks and rules that will make the process of data submission easier for each institution. The information in this section will cover these rules and provide schedules when data checks occur.

GENERAL DATA SYSTEM RULES AND CHECKS

Data Users should be aware of the following when submitting data:

1. **ENTERING PROGRAM AND ENROLLMENT DATA**
   The OTC Database was designed to enter program and enrollment information at the **END OF A PROGRAM** and not at the start of a program. OTCs will be in violation of the Terms of Agreement if entering students before they have gained any student hours within the program. To prevent misreporting, an institution must enter student program and enrollment information into the data system at the completion of their program. This can occur immediately after program completion or at any time before the September 1 deadline for program and enrollment data entry.

2. **STUDENT HOURS SHOULD NEVER EXCEED PROGRAM HOURS**
   Student hours should not be greater than the Program hours, especially if the Program crosses fiscal years. Program hours should always be equal to or greater than student hours.

3. **PROGRAMS THAT CROSS FISCAL YEARS**
   Programs crossing fiscal years should generate student hours in the first fiscal year for the Program. It should be impossible for a student to have "zero" hours in FY17 and then only have hours in FY18 when they complete. Further, when inputting this data from fiscal year to fiscal year, make sure you enter the correct number of student hours into the system.

4. **STUDENTS IN PROGRAMS THAT CROSS FISCAL YEARS SHOULD MOVE FORWARD INTO THE NEXT FISCAL YEAR**
   Students continuing in their program **should show up** in the next fiscal year. Leavers and Completers **should not** show up in the next fiscal year.

5. **STUDENT HOURS COMPLETED WITHIN A YEAR**
   Please ensure that submitted records reflect the accurate number of student hours in a year. A student who completes 1500 hours in a year may not be impossible, but in most cases very difficult to accomplish. The ODHE will closely review records that show students completing 1500 hours in a year.

6. **SUBMIT ALL OF YOUR PROGRAMS**
   The ODHE strongly encourages OTCs to submit all of their program information, technical and general. In order to receive funding, technical program and enrollment information should be submitted. For general programs, institutions have the option to either submit their student enrollment information or the numbers of students enrolled. Again, this is at the discretion of the institution.

7. **REVIEW YOUR DATA BEFORE SUBMISSION**
   The Attestor should check **ALL DATA** for accuracy before submitting it. This especially goes for uploads from your internal institution system into the OTC database. Please do not make assumptions about the data you have submitted. Make sure you are clear on what you have submitted by reviewing the dashboard and other reports available to you through the HEI system.

STUDENT "DROP INS", "DROP OUTS", AND OUTSIDE HOURS

A. *STUDENT "DROP INS"*
The HEI/OTC database was designed to capture student information in various ways. The system tracks students based on Programs and Enrollment. When students are uploaded or manually entered into the system with their Program information, the Program "start" and "end" dates become important variables in how a student is captured in data pulls. Institutions must understand this point when identifying a student in a Program that crosses fiscal years.

When a Program starts in one fiscal year and crosses over into a new fiscal year, this is considered a Program continuation. The same is true for a student in the Program that crosses fiscal years. This student is continuing in the program.

In some cases, we have institutions that have started a program with a cohort of students in one fiscal year and then end that program the following fiscal year. Throughout the years of the program that crosses fiscal years, the student will either: 1.) Leave—dropping out of the program; 2.) Continue in the program and/or; 3.) Complete—successfully finish the program.

It is also possible for a student to continue in the program but eventually "Leave" during the new fiscal year before completing the Program. These are all acceptable practices and logical scenarios.

However, an issue arises in capturing a student as someone who is continuing when this student **"Drops In."** A "Drop-In" would be identified as a student the institution allows to begin the program later than the original start date. If an institution allows this practice, in order for this "Drop-in" student to be counted as a completer, they must complete the required course work within the allotted time the program is being offered. If the student does not complete within the specified program end date, this student must be marked as a "Leaver."

B. *STUDENT "DROP OUTS"*
Students that "Drop Out" are considered "Leavers" and should be marked as such. These students should not be re-entered into a program they might have previously been enrolled in without reenrolling into the institution as a new student in a new program.

C. *STUDENTS ELIGIBLE FOR OUTSIDE HOURS*
Students that might have started at an OTC but became a "Leaver" at the school, may re-enroll in the same OTC or at another OTC. If this occurs, the previous hours gained at their former institution or at the current institution could be counted toward subsidy, but only if it is in the same program they were previously enrolled. It is at the discretion of the OTC to allow a new or former student to enroll and accept hours associated with the program they are re-enrolling in to.

OTCs must be aware that the hours needed to complete the program the student has been re-enrolled in cannot surpass the number of program hours designated for completion. The accepted hours, when combined with the student's new hours needed for program completion, must ultimately be less than or equal to the total program hours, and should never be greater than the total program hours. (See **Including "Outside" Hours to an Approved Technical Program** on page 46.)

STUDENT ATTENDANCE VERSUS PROGRAM COMPLETION GUIDANCE FOR DATA SUBMISSION

All Ohio Technical Centers (OTCs), based on the direction of their accrediting bodies, United States Department of Education (USDE) Federal Financial Aid guidelines, and their own institutional practices have standard policies that address minimum student attendance requirements for Programs/programs. In some cases, there are different attendance requirements for specific Programs, so attendance percentages might vary by Program. It is the responsibility of the institution to adhere to the direction of their accreditors and USDE as it relates to matters of federal financial aid. For the purposes of state subsidy, however, institutions may use different minimum attendance standards but shall not go beneath a floor of required 90% attendance for successful completion.

For the OTCs submission of data in to the Higher Education Information (HEI) system, we are seeking a level of consistency in reporting Program completions. As always, institutions should report students as Completers and Leavers. However, if a student successfully completes the Program content AND meets the threshold of allowable Program attendance, the institution should report that student's "student hours" as the total Program hours for completion.

- EXAMPLE: Student is enrolled in a 900 hour program. Student attendance threshold for the program is 90%. Student missed a few class sessions, so their total attendance hours have been recorded as 854 hours. However, the student passed in-class assessments demonstrating skill and competency and met all requirements for Program completion as determined by the institution. Instead of reporting 854 student attendance hours, the institution should submit 900 hours signifying the student has satisfactorily meet all Program requirements for the institution's Program.
    - RATIONALE: In many cases, this is similar to how students are awarded credit at a college or university. For example, a student is in a 3 credit hour Program. There are attendance requirements established through federal financial aid, accreditors, and possibly through the school or instructor. However, the student might miss a few classes or many classes and have their letter grade reduced, but still pass the Program by meeting all the requirements of the Program. The student's missed attendance isn't counted against them in receiving the credit. The credit hours are not reduced to 2 hours as opposed to 3 hours received for meeting the requirements.

Students who do not meet the 90% minimum threshold cannot be reported as successfully completed the Program and may only be reported as a Leaver regardless of how many hours they have accumulated through attending class sessions. If the student is in a Program that crosses fiscal years, the system will automatically count this student as continuing.

- EXAMPLE 1: Student is enrolled in a 900 hour program. Student attendance threshold for the program is 90%. Student missed a few class sessions, so their total attendance hours have been recorded as 802 hours (below the 90% threshold). Based on the institution's opinion, the student didn't meet all the requirements of the Program. The institution would submit the student's 802 hours of attendance, and record them as a Leaver.

- EXAMPLE 2: Student is enrolled in a 900 hour program that crosses fiscal years. In FY2017, the student missed a few class sessions, so their total attendance hours have been recorded as 357 hours. For FY2017, the institution would submit 357 student hours in the system. For FY2018, the institution submits the remaining 543 hours if the student completes the program, or the number of hours (453 hours at the minimum) that meets the 90% minimum student attendance threshold for the program. This should equal to the total 900 Program hours over a two year period (or at a minimum, a total of 810 hours at the 90% student attendance threshold. *If the student **doesn't complete** the remaining portion missing the 90% minimum student attendance threshold for the program in FY2018, the institution should submit the actual amount of hours attended and record the student as a Leaver.*

Ohio Department of Higher Education (ODHE) is not advocating for institutions to misrepresent the accuracy of a student completing the necessary requirements designed for Program completion. However, it is at the discretion of the institution whether or not a student has met all requirements for Program completion.

So, if a student has missed classes but has made up those Program hours or met specific competencies within the Program material demonstrating the knowledge and skill level required by the institution for successful completion, it is the responsibility of the institution to determine if the student has successfully completed the Program.

- RATIONALE: For the purposes of creating a level of consistency in the OTC data submission process, primarily for validity and integrity to the performance funding model, submitting the total Program hours for successful completion is a valid approach as opposed to submitting attendance hours that might not reflect the student's total knowledge, skills, and competencies obtained through the participation of the Program. Again, the discretion is upon the institution to make the decision on whether the student satisfactorily met all Program requirements to be determined as a successful Program completer. If the student is not determined as a successful completer, they should be recorded as a Leaver according to the situation.

DATA FINALIZATION POLICY

The ODHE relies on accurate, timely, and consistent data submitted by OTCs throughout the state to disburse funding, evaluate programs, and generate policy recommendations for consideration by the executive and legislative branches of state government. Data utilized for these purposes are most often submitted via the Higher Education Information (HEI)/Ohio Technical Center Database system, which is a comprehensive relational database that includes postsecondary data on the following topics, among others:

- Student Demographics
- Certificate, Certification, and licensure Completions
- Approved Technical and General Programs
- Faculty Information
- Special Populations
- Full-Time Equivalents (FTE)

Of particular significance, the annual allocation of the OTC State Subsidy Distribution is done using a legislatively-authorized performance based funding formula that is reliant upon various data elements submitted through the HEI/OTC data system.

Because of the magnitude of the Perkins Performance Measures, Perkins Federal Subsidy and State Subsidy Distribution, ODHE has developed a formal policy addressing the absolute finalization of institutional HEI/OTC data that affects allocations and performance measures. This policy, which takes effect immediately, addresses the finalization of applicable data for the end of each fiscal year and outlines a standardized process for institutions to follow when requesting corrections and/or updates to data from a current and prior fiscal year.

The purpose of this policy is to protect the integrity of OTC data while providing each institution with the confidence of knowing that their Perkins performance measures and/or allocation will not be impacted by ODHE's alteration of another institution's previously-finalized data.

> *Policy: Notwithstanding a conclusive audit or data discovery confirming the prior overstatement of course enrollments, degrees, or similar data elements by an institution, ODHE will not authorize institutional adjustments to previously finalized HEI data that will result in a change to Perkins Performance Measures or Perkins and State Subsidy funding allocations among institutions.*

To be clear, the policy above does not preclude institutions from making historical data corrections within the HEI system; however, it does preclude those historical data corrections from being integrated into the Perkins Performance Measure numbers and Perkins and State subsidy FTE that are used in the allocation calculations.

A. *INSTITUTIONAL PROCESS FOR SUBMITTING AND FINALIZING DATA*

The process of collecting data from OTCs consists of several steps, each with their own set of errors, warnings, tolerance checks, and verifications through the HEI/OTC data system.

Once all of the required data for a fiscal year is submitted and reviewed by ODHE staff, the ODHE System Administrator will create two reports: *OTC Database System Checks Report* and an individualized report based on an ODHE review of various data sets. These two reports will allow an institution to conduct a preliminary review of information submitted into the system. This is the first review where OTCs will be required to resolve issues and address concerns about data submitted by the September 1 deadline. After the institutional data quality review process is completed and the institution is satisfied that their integrated data produces clock hour summations aligning with what is appropriate to the performance measures/subsidy process and ODHE source data, the next step is for the institution to indicate their preliminary sign-off. The sign-off finalizes the data submitted for the September 1 deadline.

Finalizing this **September 1** deadline data indicates:

1. There will be no more submissions of Program and Enrollment data for the reporting fiscal year, including additions or deletions to existing Program and Enrollment data.
2. The fiscal year's data has been submitted accurately reflecting the institution's current environment, specifically the Program and Enrollment data with the understanding that additional Placement and Credential data can still be submitted to meet other system reporting requirements.

3. The institution certifies that it has completed a thorough review of the data submitted, properly checking potential anomalies and addressing any concerns to ensure accurate submission.

As noted, the September 1 deadline is the final time for submission of Enrollment and Program data for the reporting fiscal year. Still, institutions have more opportunities to submit Placement and Credential data into the system for Perkins Measures and OTC State Subsidy reports.

Perkins Performance Measures and Perkins Subsidy FTE Reports

The Perkins Performance Measures report deadline is **October 31**. This is the final time for Perkins institutions to include additional placement and credential data into the system, so it can be captured in the school's Perkins report. Any Placement or Credential information submitted after this time will not be a part of the reporting year's Perkins report.

Once submitted, ODHE staff will review the data. This review will include Disadvantaged student information (Special Populations) which is used for Perkins Subsidy calculations. After review, the ODHE System Administrator will create a Perkins Performance Measure Report so institutions can conduct a preliminary review of their performance measure results, as well as a report showing Disadvantaged FTE numbers. Institutions must then verify these results within a given timeframe, signing-off to finalize their data.

Finalizing this Perkins Performance Measures and Perkins Subsidy FTE Reports Indicates:

1. The fiscal year's data has been submitted accurately reflecting the institution's current environment, specifically the Disadvantaged student information with the understanding that additional Placement and Credential data can still be submitted to meet OTC State Subsidy Distribution data requirements.
2. The institution certifies that it has completed a thorough review of the data submitted, properly checking potential anomalies and addressing any concerns to ensure accurate submission.

OTC Subsidy Distribution Report

The OTC Subsidy Distribution Report deadline is **February 1**. This is the final time for all institutions to include additional Placement and Credential data into the system, so it can be captured in the school's subsidy distribution report. After ODHE staff reviews the data submitted, the ODHE System Administrator will create an OTC Subsidy Distribution Report (Spreadsheet) for an institution to conduct a preliminary review of the FTEs in the funding formula categories. After this review, institutions will verify the preliminary data by signing-off and finalizing it.

Finalizing the OTC Subsidy Distribution Report data indicates:

1. The fiscal year's data has been submitted accurately reflecting the institution's current data environment, understanding that additional data for any and all areas that impact subsidy reporting cannot be submitted.
2. The institution certifies that it has completed a thorough review of the data submitted, properly checking potential anomalies and addressing any concerns to ensure accurate submission.

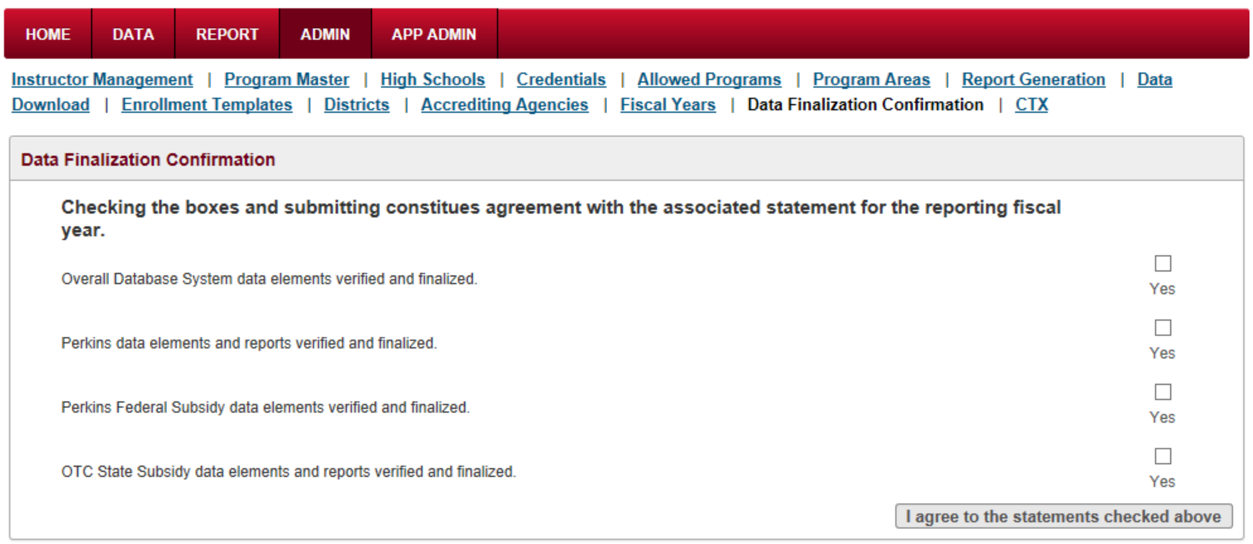
After Finalizing the fiscal year data, Performance Measures and Subsidy (Perkins and State) FTE may *not* be calculated again.

In order to "Finalize" the data, the OTC must sign-off by verifying the data they entered into the system is accurate and valid.

To verify and finalize data follow these steps:

1. Click on the ADMIN tab.
2. Click on the Data Finalization Confirmation link.
3. On the Data Finalization Confirmation screen, mark the box associated with your verification and finalization action.
4. After marking the "Yes" box, click on the "I agree to the statements checked above" box to officially "sign-off."

The institution's sign-off will be confirmed. Please follow the "Data System Finalization Rules Calendar" to make sure all data is entered by the established deadline dates.



B. *APPEALS FOR DATA CHANGES AFTER FINALIZATION*

In very limited circumstances, ODHE recognizes that data reporting errors can occur which may warrant a deviation from the policy outlined above. Therefore, ODHE has adopted a formal process to ensure that all institutions have the opportunity to submit appeals for data changes after finalization.
If an institution determines that an appeal for data change is necessary, the appeal should be initiated via email to the Vice Chancellor of Finance and Data Management. The email should include details and background associated with the data change request, a summary of data that need to be re-submitted, and the estimated length of time needed to extend submission. Once received, appeals will be reviewed by a formal committee comprised of ODHE staff members as well as a select group of OTC representatives, respectively. Once the appeal is fully reviewed, a decision will be made and the institution will be notified accordingly.

C. *DATABASE SYSTEM FINALIZATION CALENDAR*

<u>OTC Database System</u>

1. Deadline: September 1
2. ODHE Checks: September 2 – September 30

- The ODHE checks consist of:
    - Program Approval Data
    - Programs
    - Enrollment Data
    - Programs that cross fiscal years
    - Student Hours vs Program Hours
    - Credentials
    - Special Populations Data
    - Placement Data
    - Other

3. OTC Reviews: October 1 – October 29
    - Send *OTC Database System Checks Report* and potential data issues to institutions
    - Set up times to talk with institutions where there might be anomalies
    - Address issues and concerns
    - Make modifications

4. Finalize Data: October 30
    - All institutions finalize the results of the preliminary data check before the Perkins Measure, Perkins Subsidy, and OTC Subsidy Distribution Reports are produced for review and finalization

<u>Perkins Performance Measures</u>

1. Deadline: October 31

2. Data Run: November 1

3. ODHE Checks: November 1 – November 7 (at least 5 days)
    - The checks consist of:
        - Program Data (Compare to October 30 data)
        - Enrollment Data (Compare to October 30 data)
        - Special Populations Data
        - Performance Measurement Results Comparisons from Previous fiscal year
        - Subsidy Comparisons from Previous fiscal year; checking FTE increase/decrease, etc.

4. OTC Reviews: November 8 – November 22 (10 days or 2 weeks); (at day 7 all major concerns should have been addressed)*
    - Set up times to talk with institutions where there might be anomalies
    - Offer times for institutions to sign up for reviews
    - Address issues and concerns
    - Make modifications

5. Finalize Data:
    - All institutions sign-off on Finalized Data by November 30
    - Send out final reports that will be used for PIP evaluations, etc.
    - Post online before or on December 1

<u>Perkins Federal Subsidy Calculations</u>

6. OTC Calculations: Generally takes place in April or when USDE provides CTE funding information to Ohio.

7. Data Run: November 1 – Data is used from the November Perkins run and based on the review of Special Populations data (Disadvantaged Students). All checks and reviews took place between November 8 – November 22.

8. Contact institutions: Contact schools that fell below $50,000 allowable amount and discuss options (1 week to make decision to form consortium and begin work)

9. Finalize Data:
    - All institutions sign-off on finalized data by November 30
    - Allocations are uploaded into the CCIP on June 1
    - Final allocations will be posted online June 1

<u>OTC State Subsidy Distribution</u>

1. Data Run: Feb. 1

2. ODHE Checks: Feb. 2 – Feb. 8 (at least 5 days)
    - The checks consist of:
        - Program Data (Compare to October 30 data)
        - Enrollment Data (Compare to October 30 data)
        - Subsidy Comparisons from Previous fiscal year; checking FTE increase/decrease, each funding category, etc.
        - Ensuring the category fiscal year data increases if any are reasonable

3. OTC Reviews: Feb. 9 – Feb. 23 (Allow 10 days or 2 weeks); (at day 7 all major concerns should have been addressed) ODHE sends subsidy distribution spreadsheets to institutions for review.
    - Set up times to talk with institutions where there might be anomalies
    - Offer times for institutions to sign up for reviews
    - Address issues and concerns
    - Make modifications

4. Finalize Data:
    - All institutions sign-off on finalized data by March 1
    - Make allocations available by second week in August

*ODHE is not guaranteeing we will be able to address major data issues by day 7 of the 10 day period to check your institution's data. Again, it is important to check your data immediately and inform ODHE with any concerns before this time!

Note: These schedules are subject to change due to unforeseen circumstances. If changes must occur, all OTCs will be notified of the new dates and times for the process of review and finalization.

OTC DATA SYSTEM CHECKS

These are the checks that should be performed by OTCs to ensure their data is ready for finalization.

Please do the following checks of your data:

1. Check the approved program list to make sure it is correct.
    - Are these all of the programs you have offered within the last three years and will potentially offer in the near future?
    - Are any programs missing from the list?

2. Check the Allowed Programs list.
    - Check the status of programs.
        - Are there programs in draft status?
        - Are there programs in Ready to Attest status?
            - Programs must be attested to be counted for funding.
        - Are there programs in Attest status?
            - Programs in Attest status means the program being offered for the fiscal year was not approved by ODHE.

3. Check data uploads.
    - Have you uploaded data?
    - Have you checked the uploaded data to verify it is in the system?

4. Check program information.
    - Are the program dates correct?
    - Are the program names accurate?

5. Check to make sure that Approved Technical programs were not submitted as a General program.
    - The Allowed Program drop down list will reveal those programs that have been approved.

6. Check if the Student is still active – you can see the student in the system.

7. Check if the Program Name is active – you can see the program in the system.

8. Check to make sure the student is a "Completer" or "Leaver."

9. After the program has been Attested, check to make sure the Program Status shows “Funded” (because Approved Technical Programs get funded) for programs being offered or on the approved program list.

10. Check to make sure in programs that cross fiscal years, the student is active in all years of the associated program.

11. Check to make sure that in the first year of programs that cross fiscal years that the Result is “Continuing.”

ODHE DATA SYSTEM CHECKS

These are the checks that will be performed by the ODHE staff to ensure OTCs have properly entered their data into the HEI/OTC Database.

The following checks of OTC data will be performed:

1. Check to see if the student hours are greater than the program hours.
    - The system should be alerting institutions when this occurs, regardless to if it is a one year or continuing year program.
        - If not calculating the full experience it is usually an issue with continuing year programs.

2. Check to see within a one year program or a program that crosses fiscal years if the student hours are entered as zero (0) in one year.
    - If it is a one year program and no hours have been recorded this becomes questionable to why this information was provided by the school.
    - If it is a continuing program and zero (0) hours have been recorded in one of the two or more years of the program, this should not be possible.

3. Check to see with continuing programs if the hours in the first fiscal year are reasonable but the hours in the second year or completion year equal total program hours, which makes student hours greater than programs hours when totaled.
    - The system should catch this and alert the user, but it may not.

4. Review the Data System Check report for Completers below 50% of the program hours and total Completers compared to the 10% and 20% of program hours completed.
    - This is a red flag that might reveal incorrect submissions.

5. Check the list of General programs that have been Attested by the institution and approved by the ODHE System Administrator.
    - If the General programs have programs listed that appear to be technical in nature, this might be from an incorrect submission.
        - Institution might have placed it in the General program box and submitted without checking the technical program dropped down if it is an approved program.
        - Institution did not go through the Program Approval process to have the program approved for it to show on the Approved Program drop down list displayed when offering a program during a fiscal year.

6. Check Special Populations data to see how many disadvantaged students have been properly checked in the system.

7. Identify programs that don't have a credential attached.

8. Produce the OTC Data System Check Report and note potential data system issues.

9. Check program status for the following, which should not be in the system at the end of a fiscal year:
   - Programs waiting to be Attested
   - Programs in Draft
   - Programs that are Ready to Attest
   - Programs that have been Rejected

PERKINS PERFORMANCE REPORTS AND FEDERAL SUBSIDY

1. Program Data (Compare to October 31 Perkins data used for CAR)
   - There should be no new programs added, unless granted through Permission.
   - If new programs have been added, identify and calculate the increase for comparison.

2. Enrollment Data (Compare to October 31 Perkins data used for CAR)
   - There should be no new programs added, unless granted through Permission.
   - If new programs have been added, identify and calculate the increase for comparison.

3. Verify the data code -- Are the criteria all correct?
   - Is the code capturing the information correctly based on the definitions?

4. Run preliminary Perkins report and review data numbers with a side by side comparison spreadsheet revealing increases and decreases in data.
   - Look at report categories and check the trend data (previous fiscal year; reporting fiscal year) to see if there are anomalies.

5. Compare disadvantaged FTE with previous year disadvantaged FTE by each institution.
   - This information would be all 37 participating institutions not categorized with consortiums.
   - Trying to find anomalies in the data worth exploring closer.

6. Compare disadvantaged FTE with previous year disadvantaged FTE by each institution and consortium.
   - This information would include the consortiums, separating them out from the other institutions.
   - Trying to find anomalies in the data worth exploring closer.

OTC STATE SUBSIDY DISTRIBUTION

1. Program Data (Compare to October 31 data in the system)
   - There should be no new programs added, unless granted through Permission.
   - If new programs have been added, identify and calculate the increase for comparison.

2. Enrollment Data (Compare to October 31 data in the system)
   - There should be no new programs added, unless granted through Permission.
   - If new programs have been added, identify and calculate the increase for comparison.

3. Verify the data code -- Are the criteria all correct?
   - The code is capturing the information correctly based on the definitions.
   - Review columns and compare to previous year spreadsheets to ensure that data is consistent to data used in previous years.

4. Run preliminary OTC State Subsidy Distribution report and review data numbers with a side by side comparison spreadsheet revealing increases and decreases in data.
   - Look at report categories and check the trend data (previous fiscal year; reporting fiscal year).

After the data runs and comparisons, if there are potential anomalies, the ODHE System Administrator will contact the institutions to work out any issues before we move to final reviews in order to finalize the data.

When we correct data by request or through discussion with OTCs, it must be logged. We must be able to identify changes that were made and why these changes were made.

*Keep a log of changes made to data based off discoveries.

SECTION 5: CENTER FOR TRAINING EXCELLENCE APPLICATION AND REPORT

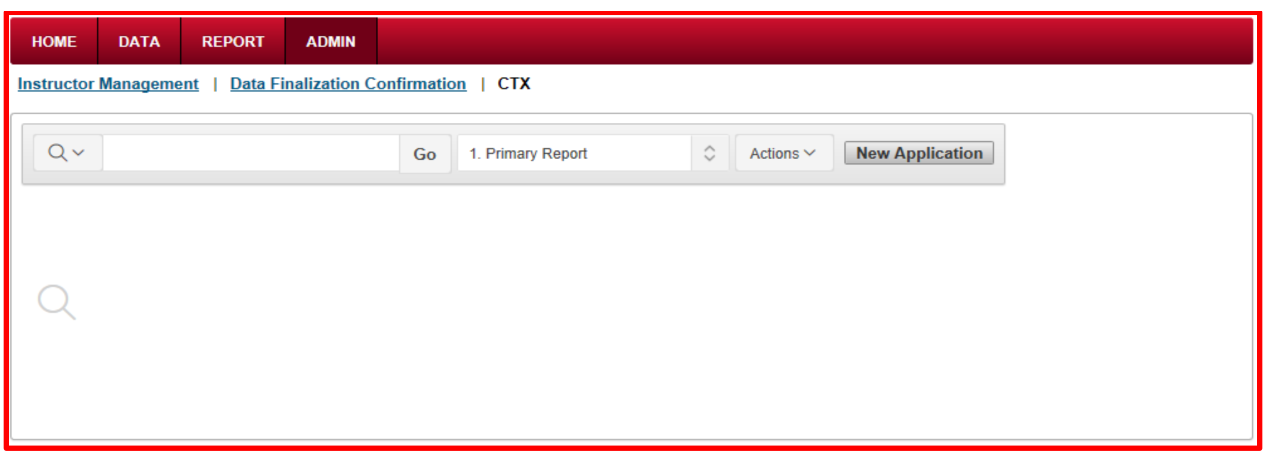
The Ohio Technical Centers (OTC), a part of the Ohio Department of Higher Education (ODHE) since 2009 and formerly known as Adult Workforce Education career centers, provided an opportunity in the 1980s for institutions to become "Full Service Centers." The purpose of a "Full-Service Center" was to provide employers, regardless of their location in Ohio, a cost efficient and educationally effective way to train and upgrade the skills of their personnel. Each Center designated as a "Full Service Center" was expected to offer a common core of training and student support services.

With a goal of reimagining the "Full Service Center" concept to be more focused with providing customized/contract training and business services, ODHE in 2016 convened a group of OTC Superintendents, Directors, and Treasurers to discuss and craft a document proposing a new way for OTCs to qualify for funding that supports an emphasis on "Customized/Contract Training" and "Business Services."

Center for Training Excellence (CTX) was proposed as the new name for institutions that have the capacity to offer customized/contract training and business services, replacing the former "Full Service Center" language and designation.

In order to access the CTX Application and submit it to the ODHE, an OTC must do the following:

1. Log in to your **HEI/OTC** account.
2. You must have **ATTESTOR** level permission to continue with the next steps
3. Click the **ADMIN** button in the main menu.
4. Click **CTX** in the sub menu
5. Click the **New Application** button in the page menu



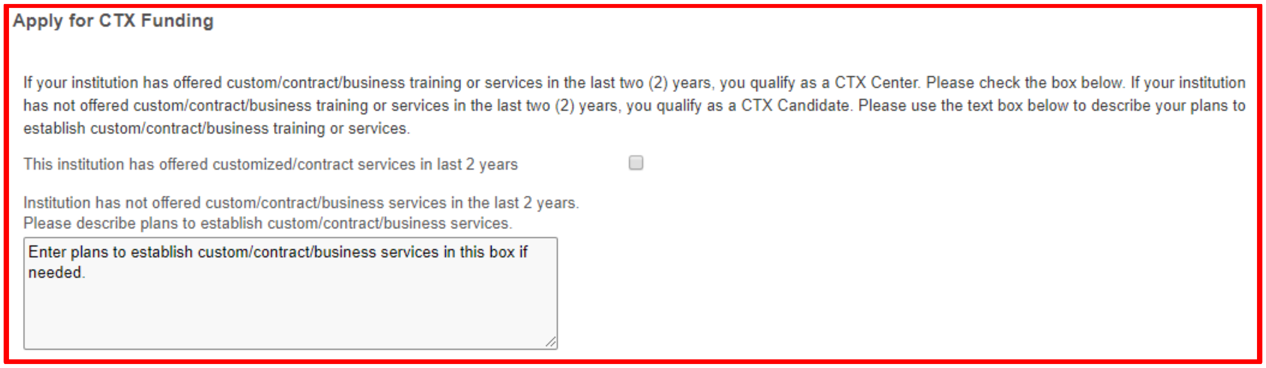
The CTX application for funding is divided into three (3) sections:

1. Apply for CTX Funding
2. Organizational Goals

3. Budget

APPLY FOR CTX FUNDING

On this page, an OTC must identify its status as either a Center for Training Excellence or a Center for Training Excellence Candidate. If it has offered customized/contract training or business consultation services in the last two (2) years, it must check the box. Once checking the box, the User will be taken to the Organizational Goals page.



Apply for CTX Funding

If your institution has offered custom/contract/business training or services in the last two (2) years, you qualify as a CTX Center. Please check the box below. If your institution has not offered custom/contract/business training or services in the last two (2) years, you qualify as a CTX Candidate. Please use the text box below to describe your plans to establish custom/contract/business training or services.

This institution has offered customized/contract services in last 2 years

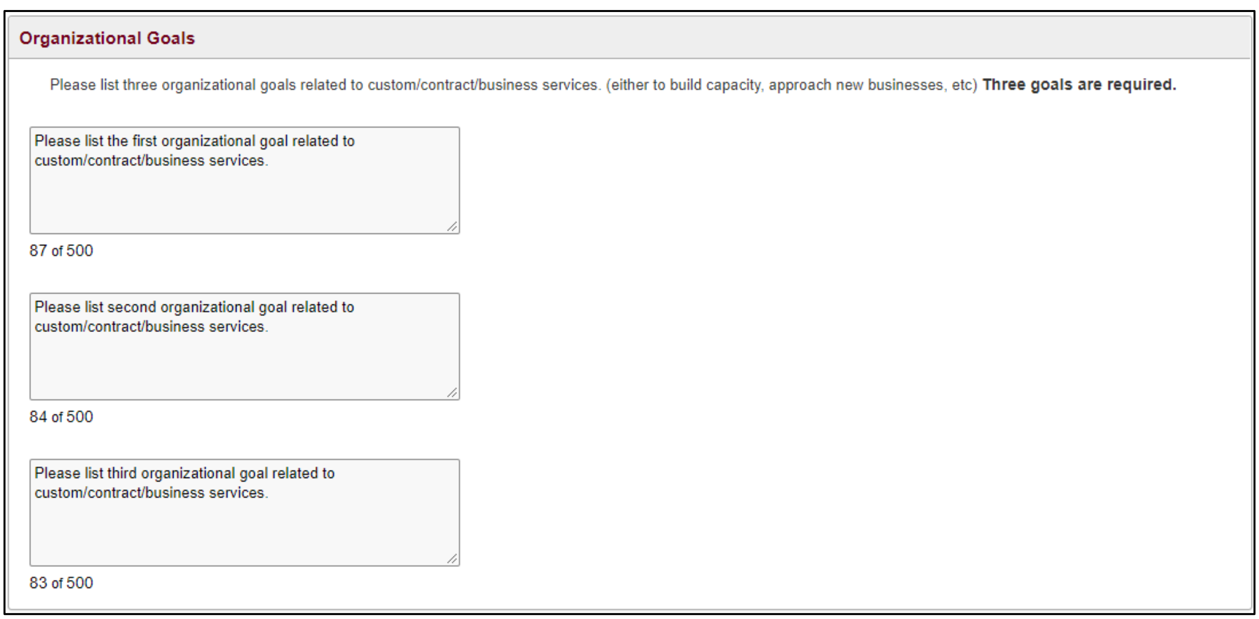
Institution has not offered custom/contract/business services in the last 2 years.
Please describe plans to establish custom/contract/business services.

Enter plans to establish custom/contract/business services in this box if needed.

If the institution has not offered customized/contract training or business consultation services in the last two (2) years, the text box will appear asking you to "Enter plans to establish custom/contract/business services." After the OTC provides its rationale, it will be taken to the Organizational Goals page.

ORGANIZATIONAL GOALS

OTCs must list three (3) goals describing how they plan to offer customized/contract training and business consultation services.



Organizational Goals

Please list three organizational goals related to custom/contract/business services. (either to build capacity, approach new businesses, etc) **Three goals are required.**

Please list the first organizational goal related to custom/contract/business services.

87 of 500

Please list second organizational goal related to custom/contract/business services.

84 of 500

Please list third organizational goal related to custom/contract/business services.

83 of 500

HOW TO APPROACH THE CTX APPLICATION AND SETTING MEASUREABLE GOALS

When you are working in the space of providing trainings or consultation services, you are essentially operating like a vendor that provides a service. You are the business.

Your institution should reach out (i.e., marketing, phone calls, etc.) to businesses or they should come to you because they know you can provide instruction and a curriculum, or work with them to build one, that can be used to train their employees on specific tasks required to enhance the company's output. This is also the true for a business seeking consultative services. For example, a company may need for you to evaluate a business process that will help them understand if training is necessary for their employees, or they might need you to develop a new plan around how the company provides services to their customers.

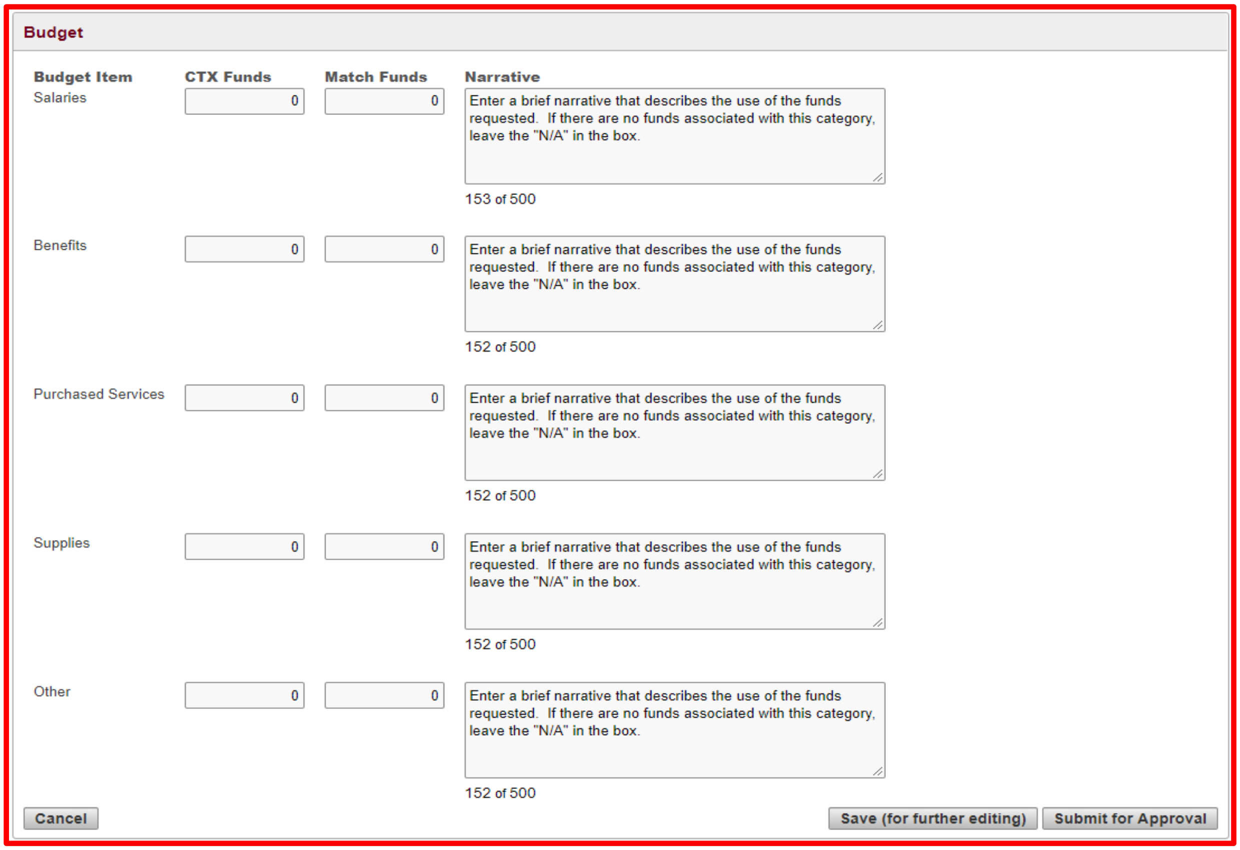
With writing your goals, focus on what CTX is primarily about: providing businesses or organizations with customized/contract training and business consultative services. Also, keep in mind that you will have to report outcomes at the end. Ask yourself: "Did the provided funding cover the goal you set?" or "Are the established goals in the context of the intent of CTX?" A goal to "Increase the number of businesses we partner with for customized training" sounds great. Yet, what is your benchmark for this goal? If you have worked with businesses in the past, one approach might be to say, "Increase the number of businesses we partner with for customized training by 5%" or to state, "Annually we work with 20 businesses for customized training. Our goal is to increase this number by 5% or work with an additional 5 to 10 more businesses."

You might also want to consider the S.M.A.R.T goals technique to help with establishing goals:

S. = Specific
M. = Measurable
A. = Attainable
R. = Realistic and
T. = Time Based

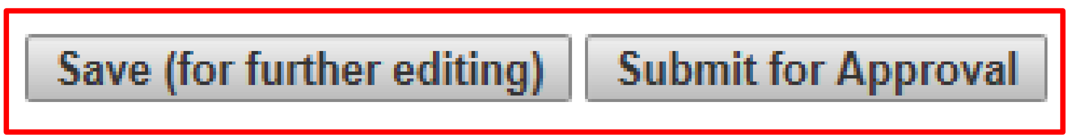
MORE EXAMPLES OF HOW YOU MIGHT WRITE GOALS:

- Establish/expand/reconstitute [name/number/percentage] business advisory councils to [insert purpose here].
- Develop a strategic plan for customized/contract/business services with 3 or 5 year goals.
- Establish/expand/reconstitute services in [name/number/percentage] field(s) to [describe why].
- Increase number of businesses approached for customized/contract/business services by [list a specific number or percent].
- [Insert your OTC desired goal] percent increase in customers reporting satisfaction with services provided (could be a baseline measurement).
- Collaborate with [name/number/percentage] postsecondary partners to [describe in detail why].


Budget

Budget Item	CTX Funds	Match Funds	Narrative
Salaries	0	0	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box. 153 of 500
Benefits	0	0	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box. 152 of 500
Purchased Services	0	0	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box. 152 of 500
Supplies	0	0	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box. 152 of 500
Other	0	0	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box. 152 of 500

Cancel | Save (for further editing) | Submit for Approval



If the OTC has previously provided customized/contract/business services within the last two years, the institution will be considered as a CTX and the ODHE staff will shift immediately to the Organizational Goals for review. However, if the OTC is seeking CTX Candidate status, the ODHE reviewer will read the statement for Candidate status and determine if the rationale meets participation requirements. If it does, the reviewer will continue to the goals section. If it does not, the ODHE reviewer will either contact the institution for more clarity or click on the "Resubmit" button, sending the application back to the OTC to correct the errors for resubmission.

Once an application is submitted, the ODHE Reviewer has three (3) choices:

1. Decline
2. Resubmit
3. Accept

After reviewing the CTX Candidate statement (if one needs to be developed), the Organizational Goals, and the Budget, the Reviewer can accept the application if they believe it meets the application criteria. By clicking on the "Accept" button, the OTC Attestor is alerted with an email message stating that the application has been accepted and will be funded for the new fiscal year.

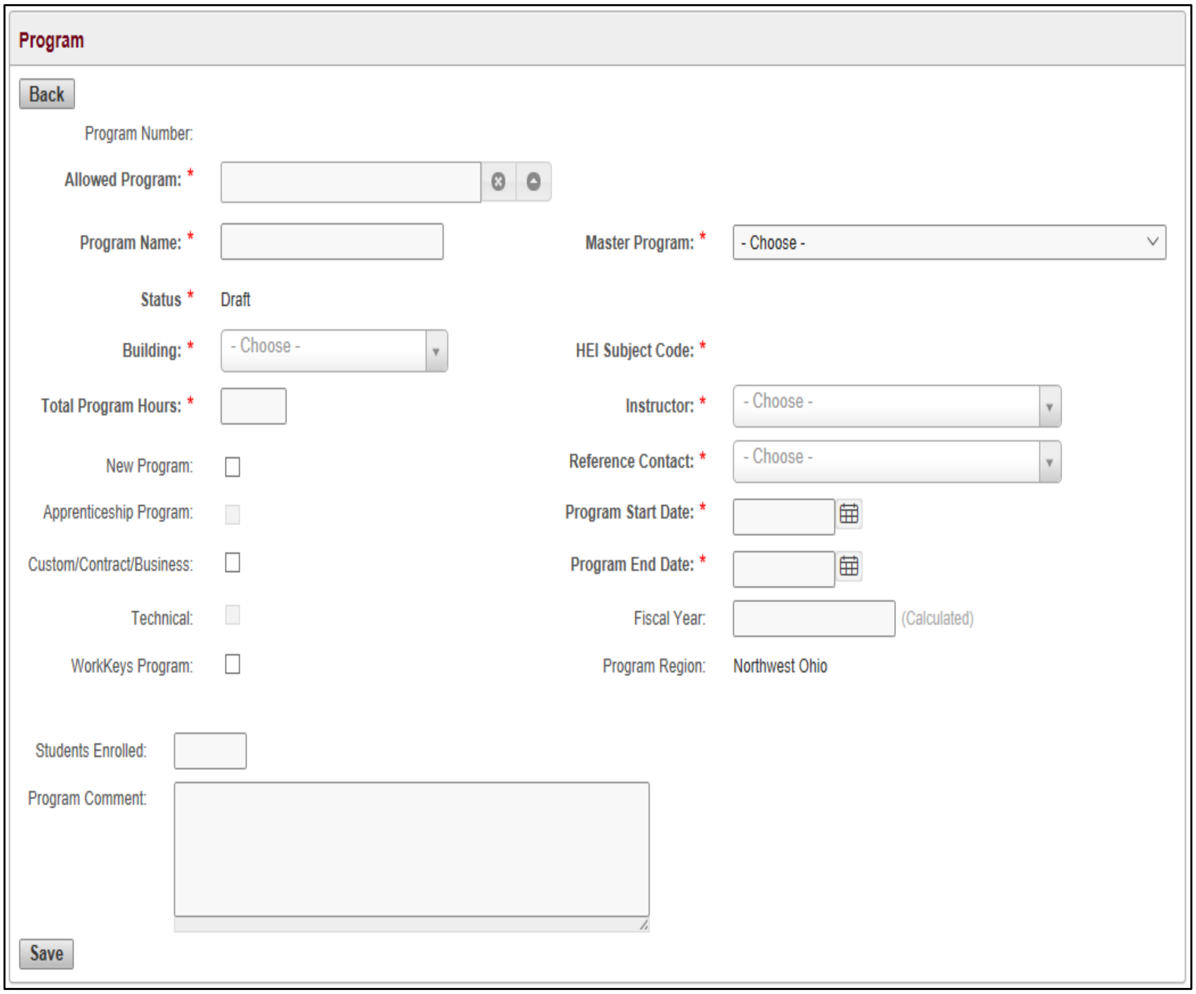
However, during the review of the application, the ODHE Reviewer finds issues with the goals, budget, or CTX Candidate statement, they will click on the Resubmit button. This action causes the below box to appear.

The Reviewer will provide a statement explaining the issue(s) and what needs to be corrected before resubmitting for another review. In some cases, the Reviewer might contact the OTC Director to specifically discuss the issue(s) or seek more clarification before sending it back to the institution.

In the rarest of cases, it is possible for an application to be Declined; however, there will be multiple attempts by the ODHE Reviewer to work with the OTC prior to any resubmission. If an application is declined, that OTC will not receive funding to assist with any contract/customized training or business consultation services.

ENTERING CTX PROGRAMS

At the conclusion of finishing a training or business service, it is the responsibility of the OTC to enter their program data. In order to accomplish this task, the Attestor/User must go to the "Data" section, click on the Data tab and click on "Add Program." This will open the Program page.

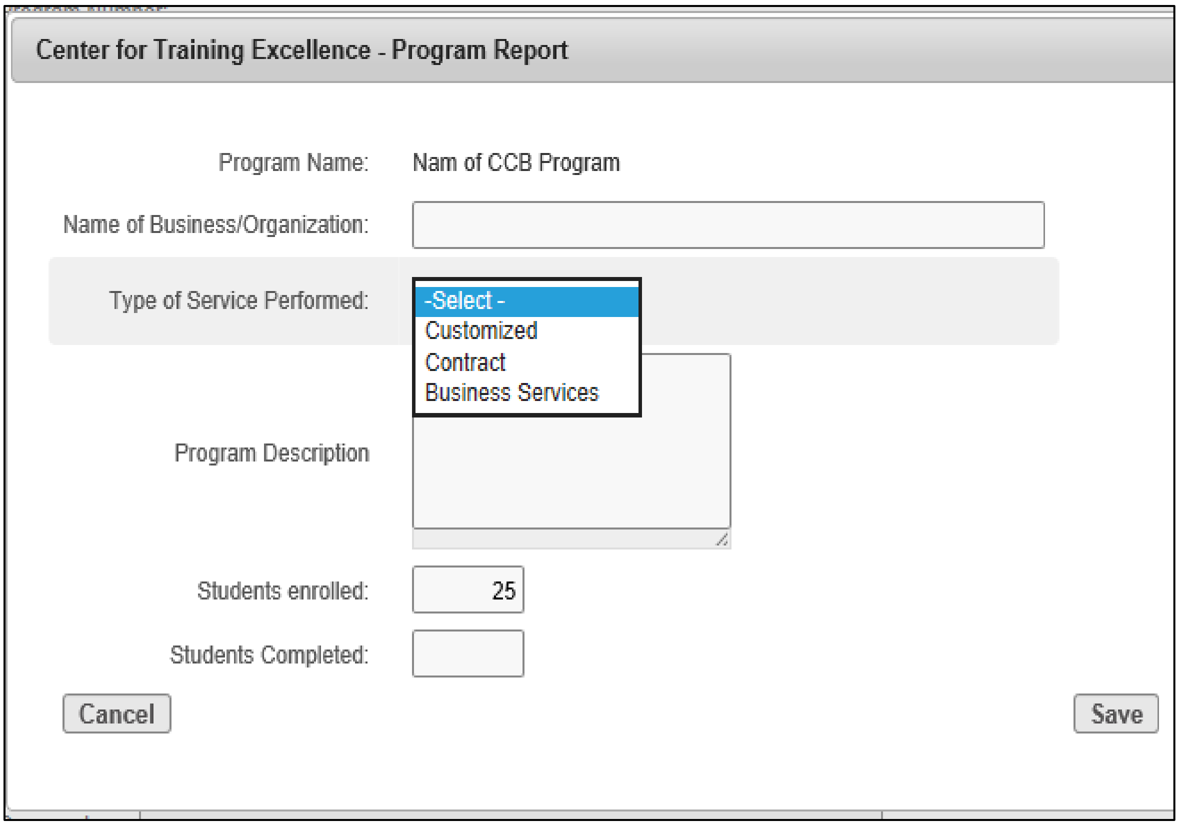


Follow these steps in order to enter the program correctly:

1. **Program Name** – enter name of program
2. **Master Program** – select a master program from the dropdown list
3. **Status** – will automatically populate
4. **Building** – select the location of the program
5. **HEI Subject Code** – will automatically display based on the Master Program
6. **Total Program Hours** – enter the number hours for completion of the program
7. **Instructor** – select instructor name
8. **Reference Contact** – select contact name
9. **Custom/Contract/Business** – check this box for CTX programs
10. **Program Start Date** – enter start date of program
11. **Program End Date** – enter end date of program
12. **Fiscal Year** – will automatically populated base on Program Start and End dates

13. **Students Enrolled** – enter the number of students that have enrolled
14. **Program Comment** – enter comments if needed
15. **Save** – click once, all information is entered

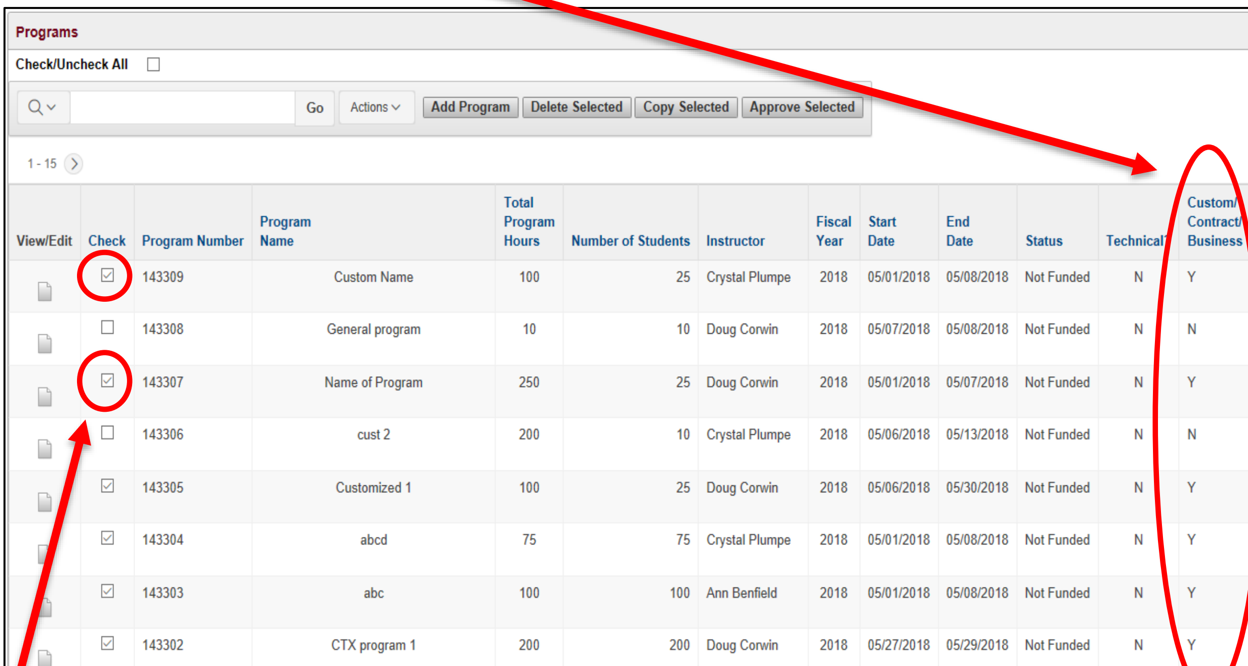
Once the Program page is completed and the Attestor/User clicks SAVE, the CTX- Program Report page will appear.



Follow these steps in order to enter the program information correctly:

1. **Program Name** – this data will self-populate from the previous page
2. **Name of Business/Organization** – enter the name of the business or organization that is sponsoring the program
3. **Type of Service Performed** – select Customized, Contract or Business Services
4. **Program Description** – enter a description of the program
5. **Students Enrolled** – this data will be entered from the previous page
6. **Students Completed** – enter the number of students that have successfully completed the program
7. **Save** – click once, all information is entered

For an additional view, ALL the CTX programs entered in the system will be identified with a "Y" in the Custom/Contact/Business column.



Programs

Check/Uncheck All

Go | Actions | Add Program | Delete Selected | Copy Selected | Approve Selected

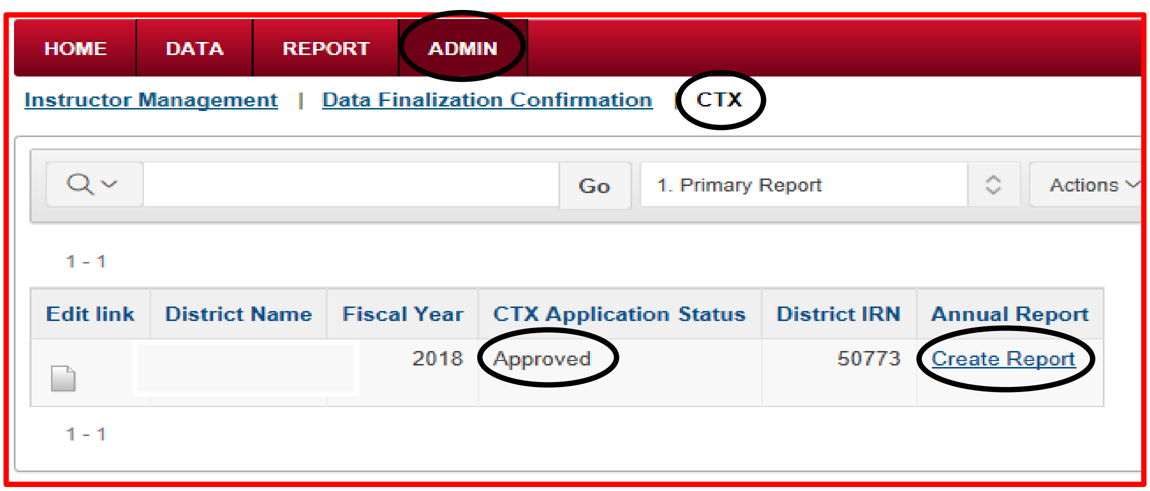
1 - 15

View/Edit	Check	Program Number	Program Name	Total Program Hours	Number of Students	Instructor	Fiscal Year	Start Date	End Date	Status	Technical	Custom/ Contract/ Business
	☑	143309	Custom Name	100	25	Crystal Plumpe	2018	05/01/2018	05/08/2018	Not Funded	N	Y
	☐	143308	General program	10	10	Doug Corwin	2018	05/07/2018	05/08/2018	Not Funded	N	N
	☑	143307	Name of Program	250	25	Doug Corwin	2018	05/01/2018	05/07/2018	Not Funded	N	Y
	☐	143306	cust 2	200	10	Crystal Plumpe	2018	05/06/2018	05/13/2018	Not Funded	N	N
	☑	143305	Customized 1	100	25	Doug Corwin	2018	05/06/2018	05/30/2018	Not Funded	N	Y
	☑	143304	abcd	75	75	Crystal Plumpe	2018	05/01/2018	05/08/2018	Not Funded	N	Y
	☑	143303	abc	100	100	Ann Benfield	2018	05/01/2018	05/08/2018	Not Funded	N	Y
	☑	143302	CTX program 1	200	200	Doug Corwin	2018	05/27/2018	05/29/2018	Not Funded	N	Y

To ensure that CTX programs will be added to your CTX Annual Report, check the box in the row associated with the Custom/Contract/Business column marked "Y."

HOW TO SUBMIT THE CTX ANNUAL REPORT TO ODHE

1. You must have **ATTESTOR** level permission to submit a report.
2. Click the **ADMIN** button on the main menu.
3. Click **CTX** in the sub menu.
4. The **CTX Application Status must** state "Approved."
5. Click the **Create Report** link.



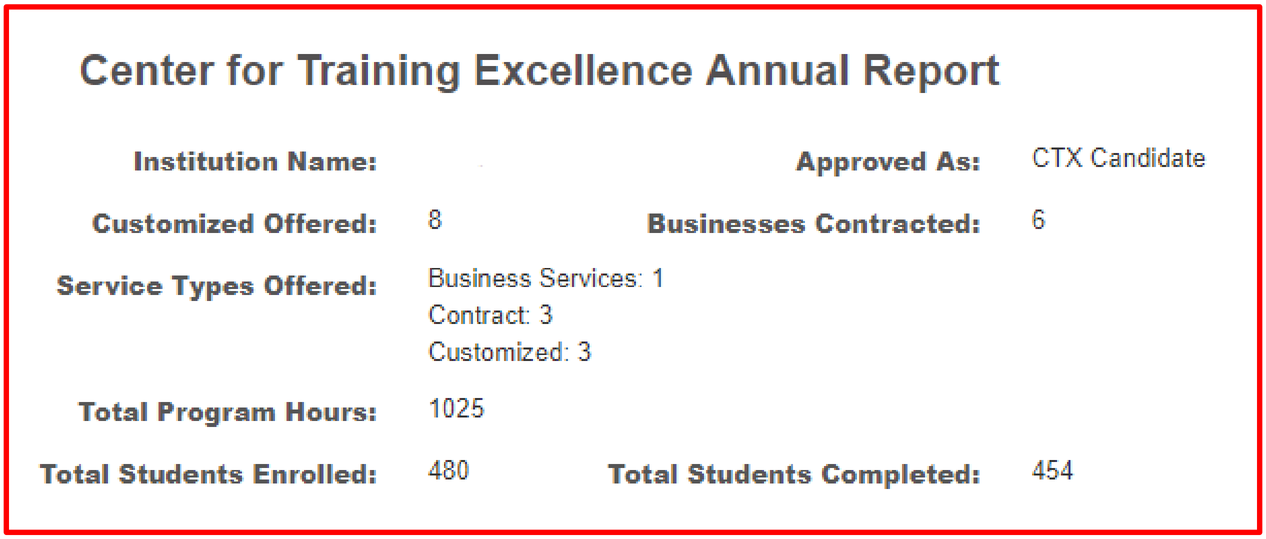
Edit link	District Name	Fiscal Year	CTX Application Status	District IRN	Annual Report
		2018	Approved	50773	Create Report

1 - 1

The Create Report link will produce the Center for Training Excellence (CTX) Report information, which has five sections:

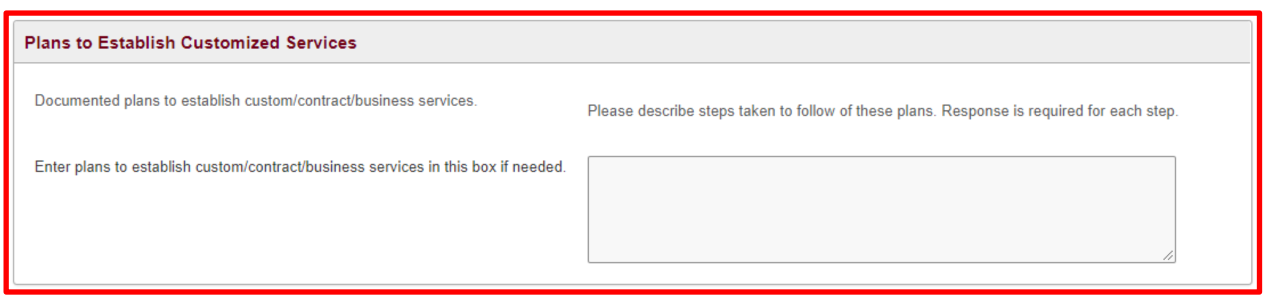
1. Center for Training Excellence Annual Report

   The CTX Annual Report summarizes all the data that the institution entered into the system on the CTX Program page.



2. Plans to Establish Customized Services

   If you were an institution that qualified for the CTX because you had offered training and services for the last two (2) years, this box will not appear. However, for those institutions that are CTX Candidate status and had not offered training or services within the last two (2) years, filled out a box describing their plans to establish training and services. This section displays the plan description and then provides a box to describe the steps taken to establish a training or service presence.



3. Organizational Goals

   During the application process, each institution had to submit three goals. Here you will see those initially submitted goals next to three boxes. In the boxes, the OTC must explain if these goals were achieved and how they were achieved.

Organizational Goals – Response to each goal is required

Documented organizational goals related to custom/contract/business services.	Please describe steps taken to achieve each of these goals.
Please list the first organizational goal related to custom/contract/business services.	
Please list second organizational goal related to custom/contract/business services.	
Please list third organizational goal related to custom/contract/business services.	

4. Approved Budget

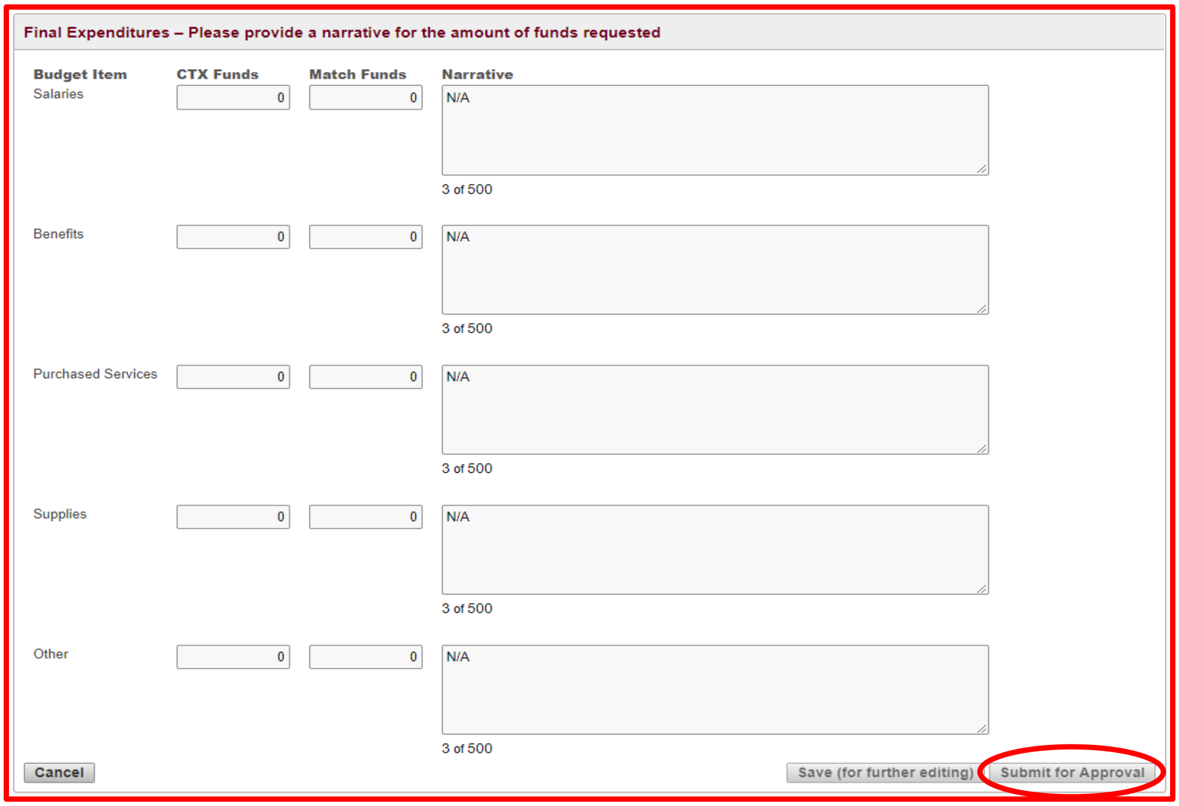
   This section displays the budget that the institution submitted and was approved by ODHE for training and services to be performed.

Approved Budget

Budget Item	CTX Funds	Match Funds	Total Funds	Narrative
Salaries	$0.00	$0.00	$0.00	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box.
Benefits	$0.00	$0.00	$0.00	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box.
Purchased Services	$0.00	$0.00	$0.00	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box.
Supplies	$0.00	$0.00	$0.00	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box.
Other	$0.00	$0.00	$0.00	Enter a brief narrative that describes the use of the funds requested. If there are no funds associated with this category, leave the "N/A" in the box.
Report Total:	**$0.00**	**$0.00**	**$0.00**	

5. Final Expenditures

   By using the Approved Budget overview, the OTC must provide information on how it spent its funds showing if it was in line to what was initially submitted to ODHE. This also means explaining how funds were actually spent in the Narrative portion.

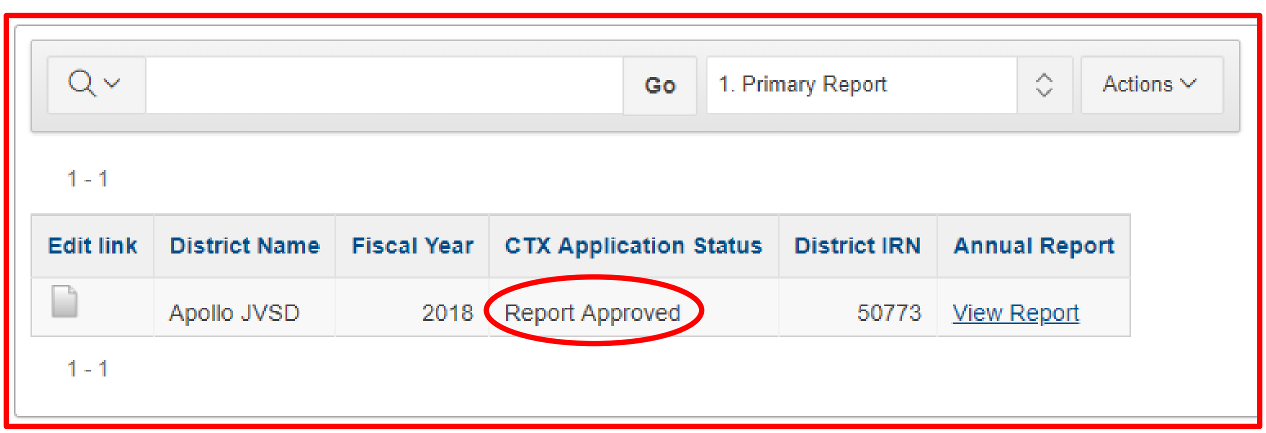

Final Expenditures – Please provide a narrative for the amount of funds requested

Budget Item	CTX Funds	Match Funds	Narrative
Salaries	0	0	N/A (3 of 500)
Benefits	0	0	N/A (3 of 500)
Purchased Services	0	0	N/A (3 of 500)
Supplies	0	0	N/A (3 of 500)
Other	0	0	N/A (3 of 500)

Cancel | Save (for further editing) | Submit for Approval

After completing this portion, the OTC must **submit the report for review and approval** by ODHE. The ODHE staff will review the report and either approve it or send it back to the OTC if there are questions about the submitted information or if more information is needed to finalize the process.

If the report is declined, resubmitted, or accepted (approved), the OTC will receive an email notification informing it of its status.


Go | 1. Primary Report | Actions

1 - 1

Edit link	District Name	Fiscal Year	CTX Application Status	District IRN	Annual Report
	Apollo JVSD	2018	Report Approved	50773	View Report

1 - 1

APPENDICES

APPENDIX 1: RACE/ETHNICITY REQUIREMENTS

Categories developed in 1997 by the Office of Management and Budget (OMB) that are used to describe groups to which individuals belong, identify with, or belong in the eyes of the community. The categories do not denote scientific definitions of anthropological origins. The designations are used to categorize U.S. citizens, resident aliens, and other eligible non-citizens. Individuals are asked to first designate ethnicity as:

- Hispanic or Latino or
- Not Hispanic or Latino

Second, individuals are asked to indicate one or more races that apply among the following:

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

Hispanic or Latino
A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.
American Indian or Alaska Native
A person having origins in any of the original peoples of North and South America (including Central America) who maintains cultural identification through tribal affiliation or community attachment.
Asian
A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
Black or African American
A person having origins in any of the black racial groups of Africa.
Native Hawaiian or Other Pacific Islander
A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
White
A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
Nonresident alien
A person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely. Note: Nonresident aliens are to

be reported separately in the places provided, rather than in any of the racial/ethnic categories described above.
Resident alien (and other eligible non-citizens)
A person who is not a citizen or national of the United States but who has been admitted as a legal immigrant for the purpose of obtaining permanent resident alien status (and who holds either an alien registration card (Form I-551 or I-151), a Temporary Resident Card (Form I-688), or an Arrival-Departure Record (Form I-94) with a notation that conveys legal immigrant status such as Section 207 Refugee, Section 208 Asylee, Conditional Entrant Parolee or Cuban-Haitian). Note: Resident aliens are to be reported in the appropriate racial/ethnic categories along with United States citizens.
Race/ethnicity unknown
The category used to report students or employees whose race and ethnicity are not known.

If an individual omits or refuses to provide his or her racial and ethnic identity, that person should be reported in the "Race and ethnicity unknown" category. In some instances, it may be necessary for the Department to request additional information about the race and ethnicity of individuals at the postsecondary level in order to resolve specific issues, e.g., those presented in a discrimination complaint or compliance review.
(http://www2.ed.gov/policy/rschstat/guid/raceethnicity/questions.html#postsec)

APPENDIX 2: Perkins Federal Performance Measure Definitions

Technical Skill Attainment (1A1)

Numerator: Number of CTE concentrators who left adult workforce education in the reporting year and passed State-recognized technical skill assessments.

Denominator: Number of CTE concentrators who left adult workforce education in the reporting year and took State-recognized technical skill assessments.

Credential, Certificate, or Degree (2A1)

Numerator: Number of CTE concentrators who left adult workforce education in the reporting year and received an industry-recognized certificate or license.

Denominator: Number of CTE concentrators who left adult workforce education in the reporting year.

Student Retention or Transfer (3A1)

Numerator: Number of status-known CTE concentrators enrolled in adult workforce education the previous reporting year and who, during the reporting year, remained enrolled in the same adult workforce education institution or transferred to another adult workforce education institution or a 2- or 4-year postsecondary institution.

Denominator: Number of status-known CTE concentrators enrolled in adult workforce education the previous reporting year and who, in the previous reporting year, did not earn an industry-recognized certificate or license.

Student Placement (4A1)

Numerator: Number of status-known CTE concentrators who were employed, in military service or in apprenticeship programs in the second (2nd) quarter following the program year in which they left adult workforce education.

Denominator: Number of status-known CTE concentrators who, in the previous year, left adult workforce education.

Nontraditional Participation (5A1)

Numerator: Number of CTE participants from underrepresented gender groups in the reporting year who participated in an adult workforce education program that leads to employment in nontraditional fields.

Denominator: Number of CTE participants in the reporting year who participated in an adult workforce education program that leads to employment in nontraditional fields.

Nontraditional Participation (5A2)

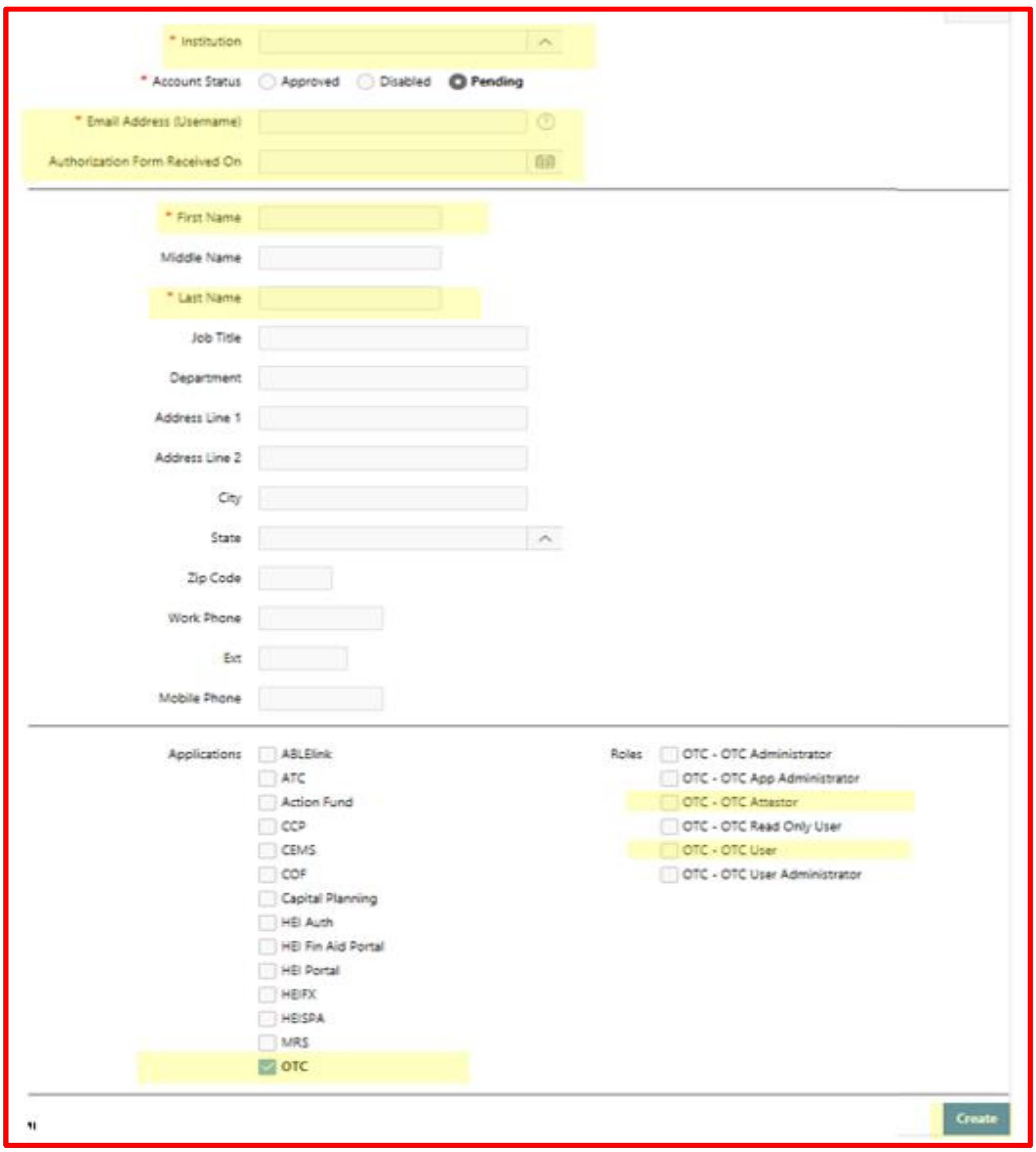
Numerator: Number of CTE concentrators from underrepresented gender groups in the reporting year who completed an adult workforce education program that leads to employment in nontraditional fields.

Denominator: Number of CTE concentrators in the reporting year who completed an adult workforce education program that leads to employment in nontraditional fields.

APPENDIX 3: HOW TO MANAGE USERS AND ATTESTORS

1. Go to https://heiauth.ohiohighered.org/ and enter Username and Password
2. Press the **Add a New Account** button (lower right corner of page)
3. Enter required data for the user:

    a. Institution, Email Address (Username), First Name and Last Name
    b. Click on the **OTC** box in the Applications section of the page
    c. Then select **OTC – OTC User** or **OTC – OTC Attestor**
        i. Remember no OTC can have more than two Attestors
4. Press **Create** once all information is in the system.
5. An email notification will go out the User or Attestor for that user to set their password.

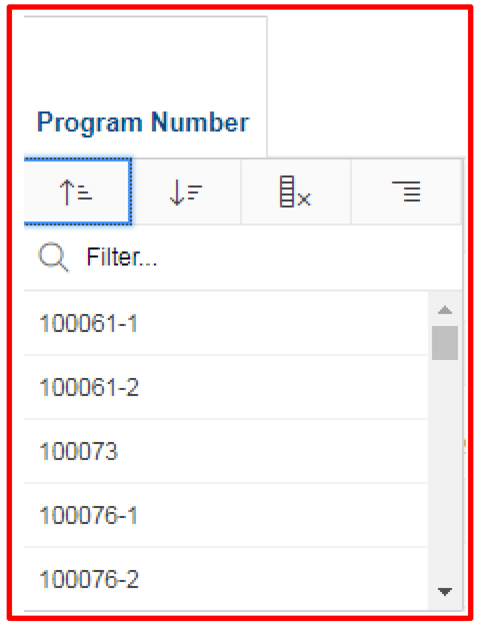


APPENDIX 4: How to Create Customized Reports in the OTC Database System

In order to create reports, please go to the "Overall Report" Function.

Using the Column Heading menu

Clicking the column in a table will display a column heading menu. Positioning the cursor over each icon displays a tooltip that describes that icons function.

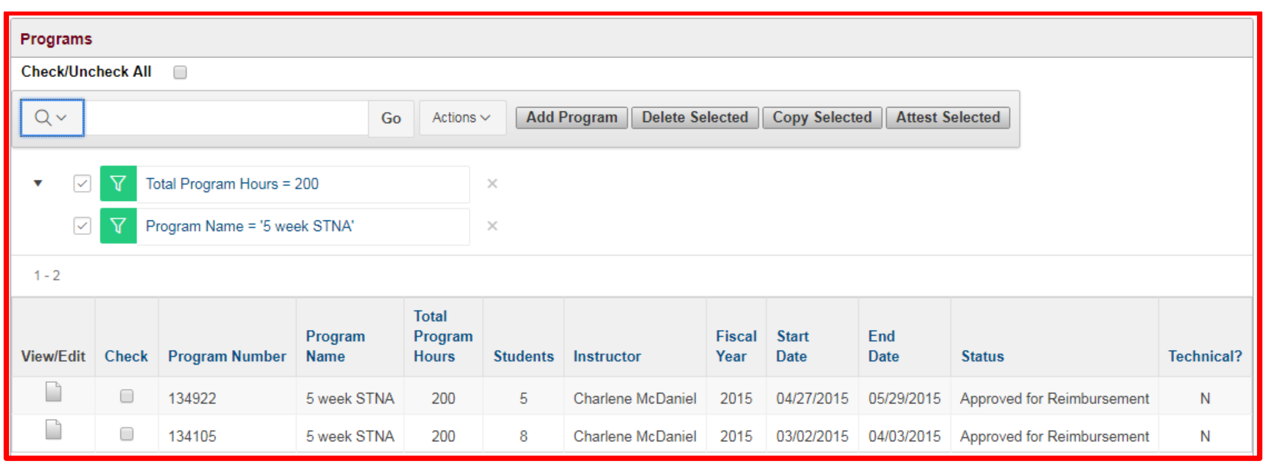


Column Heading menu options include:

1. Sort Ascending - Sorts the report by the column in ascending order.
2. Sort Descending - Sorts the report by the column in descending order.
3. Hide Column - Hides the column. Not all columns can be hidden. If a column cannot be hidden, the Hide Column icon does not display.
    - To show a hidden column, select **Reset** from the Actions menu.
4. Control Break - Creates a break group on the column. This pulls the column out and makes it a header for all records that fall under that heading.
5. Filter - Enter a case sensitive search criteria. Entering a value reduces the list of values at the bottom of the menu. You can then select a value from the list

Using Interactive Reports Filters

When you customize an interactive report, a filter displays between the search bar and the report. The following illustration shows a report with two filters: `Total Program Hours = '200'` and `Program Name = '5 week STNA'`. Filters display in the Report Settings area above the report. You can show or hide the filter details by clicking the arrow to the left of the filter name.

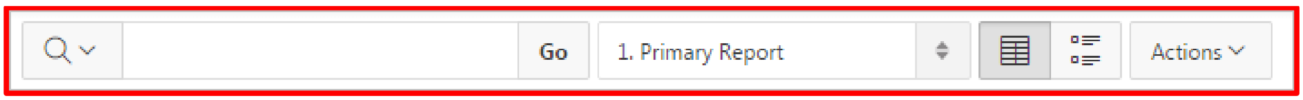


Using Interactive Reports

The purpose of an interactive report is to enable the user to customize the appearance of the data through searching, filtering, sorting, column selection, highlighting, and other data manipulations.

An Interactive Report allows users to create highly customized reports. Users can alter the report layout by hiding or exposing specific columns and applying filters, highlighting, and sorting. They can also define breaks, aggregations, charts, group data, and add their own computations. Once customized, the report can be saved as either a private or public report. Most interactive reports include a search bar, Actions menu, Column Heading menu, and edit icons in the first column of each row.

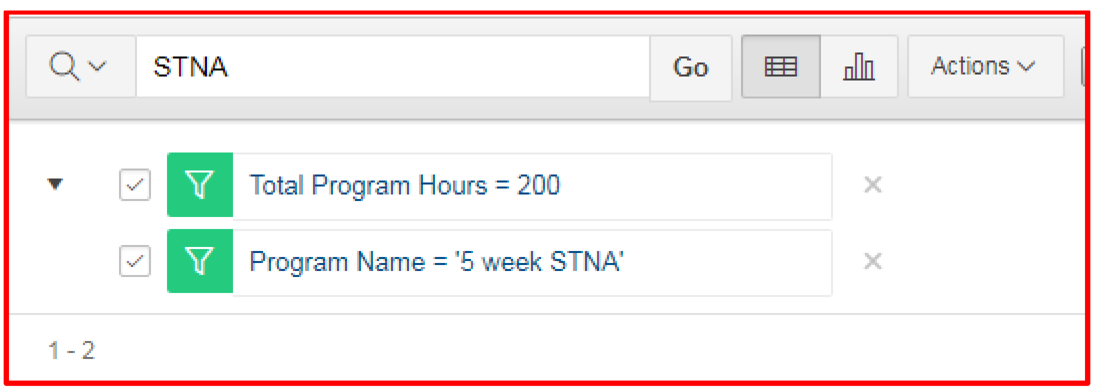
Using the Search Bar



A search bar displays at the top of most interactive reports and may include the following features:

- Select columns to search icon - Resembles a magnifying glass. Click this icon to narrow your search to specific columns. To search all columns, select **All Columns**.
- Text area - Enter case insensitive search criteria and then click **Go**.
- Go button - Executes a search.
- View Report - Displays alternate default and saved private, or public reports.
- View icons - Switches between an icon, report and detail view of the default report (if enabled). May also include Chart and Group By View (if defined).
- Actions menu - Use the Actions menu to customize an interactive report.

Using the Select Columns to Search Icon

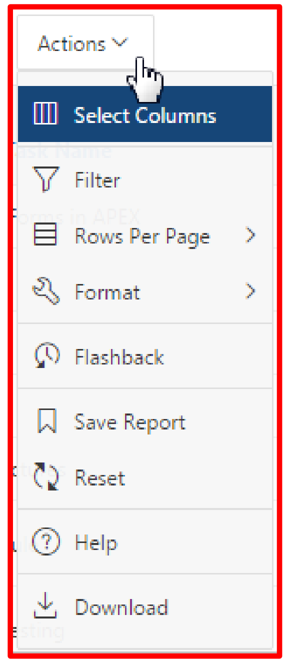


The Select columns to search icon displays to the left of the search bar. Click this icon to display a listing of all columns in the current report. To search specific columns:

1. Click the **Select columns to search** icon and select a column.
2. Enter keywords in the Text area and click **Go**.
3. To disable the filter, select the **Enable/Disable Filter** check box.
4. To delete the filter, click the **Remove Filter** icon.

How to use the Actions menu?

The Actions menu appears to the right of the Go button on the Search bar. Use the Action button to customize your on screen view or report for printing.



The Action menu appears to the right of the Go button on the Search bar. Use this menu to customize an interactive report:

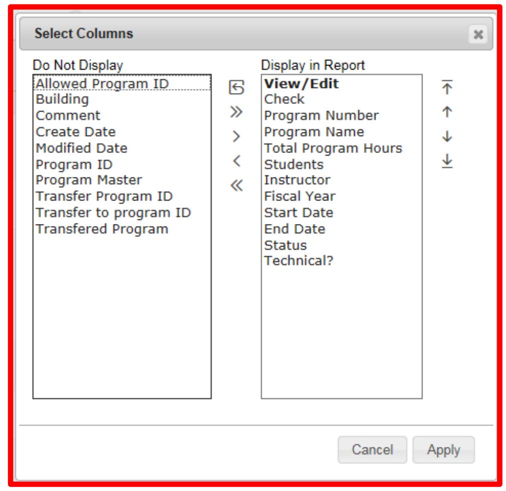
- **Select Columns** specifies which columns to display and in what order.
- **Filter** focuses the report by adding or modifying the filter choices or a specific column or row
- **Rows Per Page** determines how many rows display in the current report
- **Format** contains the following submenu for:
  - Sort - Changes the columns to sort and determines whether to sort in ascending or descending order.
  - Control Break - Creates a break group on one or several columns. This pulls the columns out of the interactive report and displays them as a master record.
  - Highlight - Defines a filter that highlights the rows that meet the filter criteria.
  - Compute - Enables users to add computed columns to a report.
  - Aggregate - Enables users to perform mathematical computations against a column.
  - Chart - Displays the report data as a chart.
  - Group By - Enables users to group the result set by one or more columns and perform mathematical computations against columns.
- **Flashback** - Enables users to view the data as it existed at a previous point in time.
- **Save Report** - Saves the interactive report for future use.
- **Reset** - Resets the report back to the default report settings.
- **Help** - Provides descriptions of how to customize interactive reports.
- **Download** - Downloads a report

How to use functions:

Select Column

To select columns you would like to use on your screen:

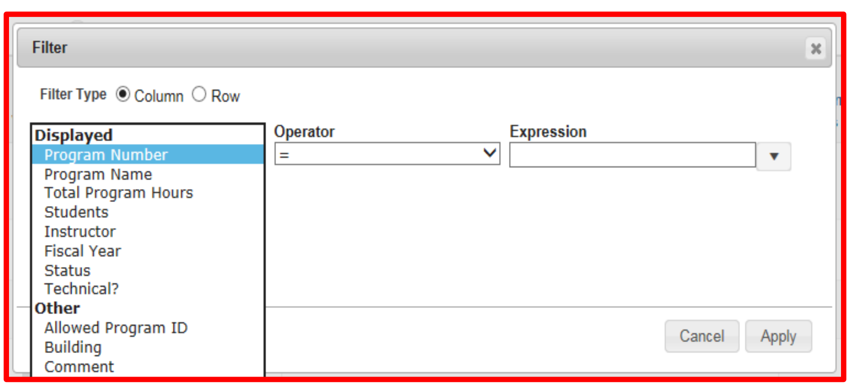
1. Click Actions
2. Click Select Columns
3. Select columns you want to appear on screen. Here you will also be able to move columns from either the **Do Not Display** or **Display in Reports** columns. You can also change the order of the table by moving the selected item up or down on the list.
4. Click Apply and the table will appear with the columns that you have selected.



Column Filter

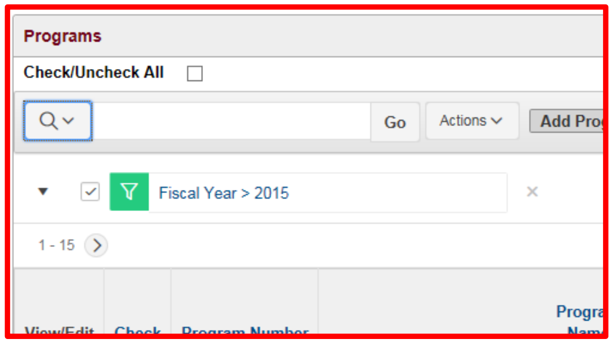
To filter the columns that you would like to use on your screen:

1. Click Actions
2. Click Filter
3. For Filter Type, select Column
   a. Select Column
   b. Select Operator
   c. Select Expression
4. Click Apply



To revise the filter:

1. Click the filter name
2. Choose another column
3. Click Apply



To disable the filter:

1. Uncheck the filter
2. Allow page to refresh

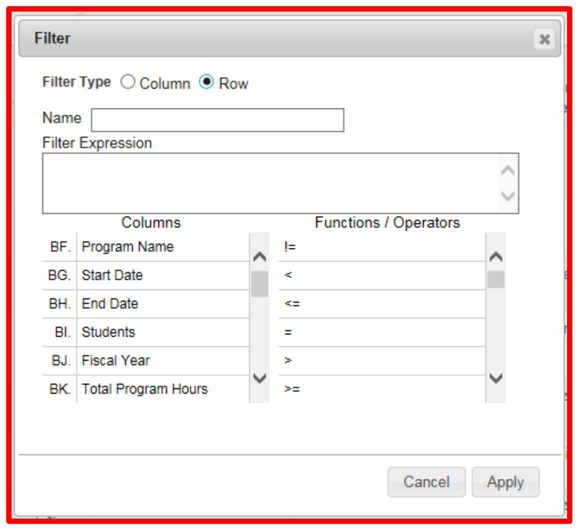
To delete the filter:

1. Click the "X" box right of the filter box

Row Filter

To filter the rows that you would like to use on your screen:

1. Click Actions
2. Click Filter
3. For Filter Type, select Row
   a. Name – enter a name that describes filter
   b. Filter Expression – select from the columns below
   c. Click Apply
4. Click Apply



To revise the filter:

1. Click the filter name
2. Edit your query
3. Click Apply

Disable the filter:

1. Uncheck the filter
2. Allow page to refresh

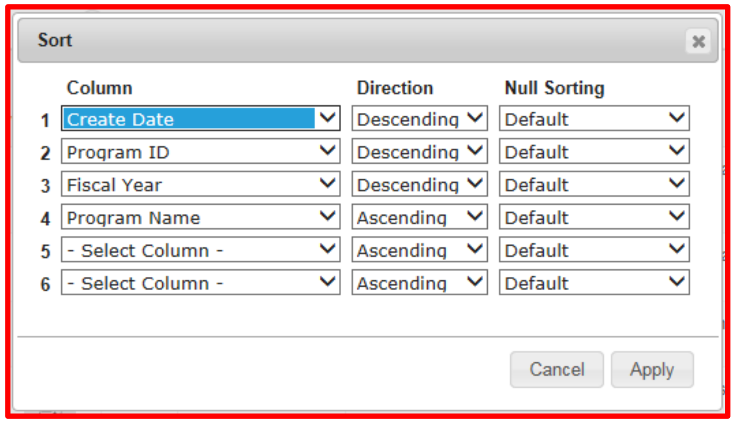
To delete the filter:

1. Click the "X" box right of the filter box

Rows Per Page

To specify the number of rows that display on the page by selecting rows Per Page on the Actions menu:

1. Click the Actions menu
2. Select the rows Per Page
3. From the submenu, select the number of your choice



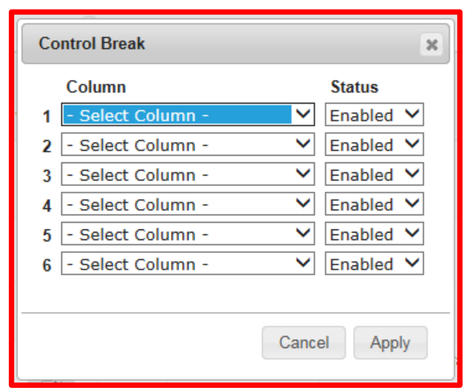
Format – Sort

To specify column display use Sort the Format submenu.

1. Click the Actions menu
2. Select Format and then click on Sort
3. Select a column
4. Sort direction (Ascending or Descending)
5. Select Null Sorting (Default, Nulls Always Last, or Nulls Always First).

Format – Control Break

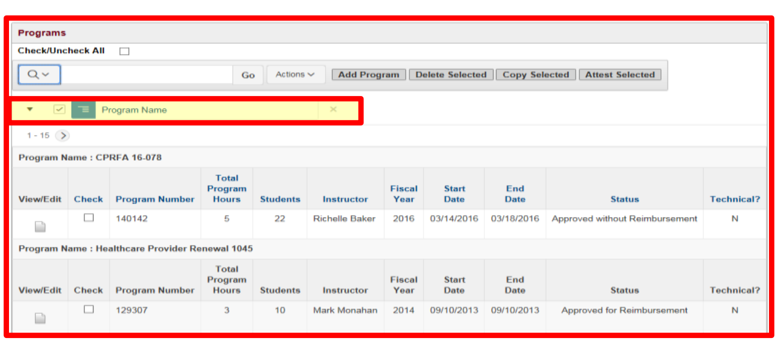
To create a break group on one or several columns. This report pulls the columns out of the interactive report and displays them as a master record.



1. Click the Actions menu
2. Select format and click Control Break
3. Select the column and then the status (Enable or disable)
4. Click Apply

Note the defined filter displays in the Report Settings area above the report.

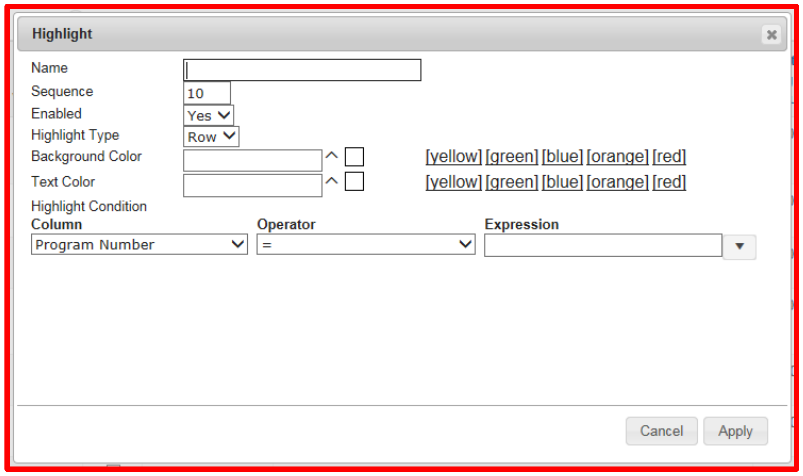
5. Click the left arrow to expand the filter.
6. To disable the Control Break filter, deselect the Enable/Disable Filter check box. To activate a disabled filter, select the Enable/Disable Filter check box again.
7. To delete the filter, click the "X" which is the Remove Control Break.

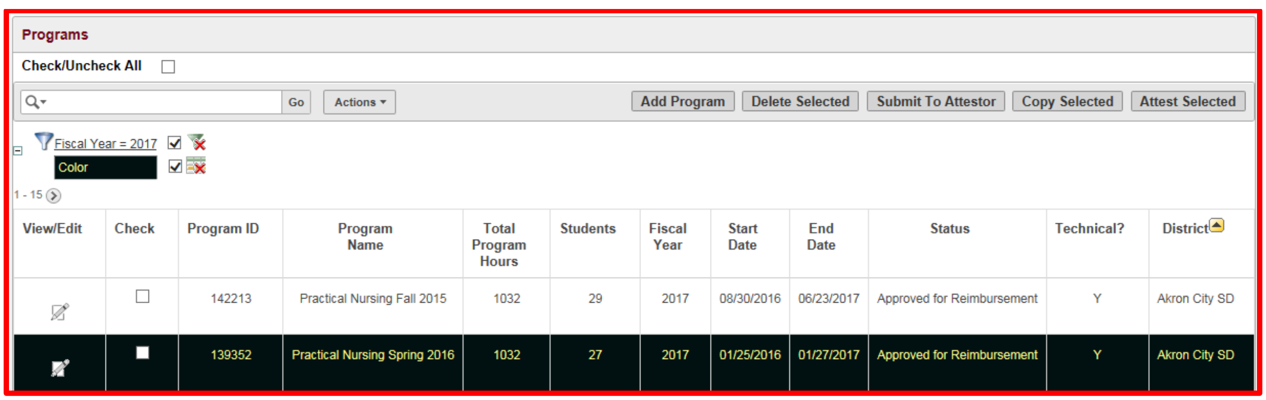


Format – Highlight

To customize the display to highlight specific rows in a report select "Highlight" on the Actions format submenu.

1. Click Actions
2. Select format and then Highlight
3. Edit the following information:
    a. Name – Enter a name that describes highlight
    b. Sequence should be set to "0"
    c. Enable – Select Yes
    d. Highlight Type – Select Cell or row
    e. Background color – Select the color for the background highlighted area
    f. Text color – Select the a color for the text in highlighted area
    g. Highlighted Condition – Select a column, an operator and expression for the highlight





To revise the highlight, click the highlight name and make the edits that you need.

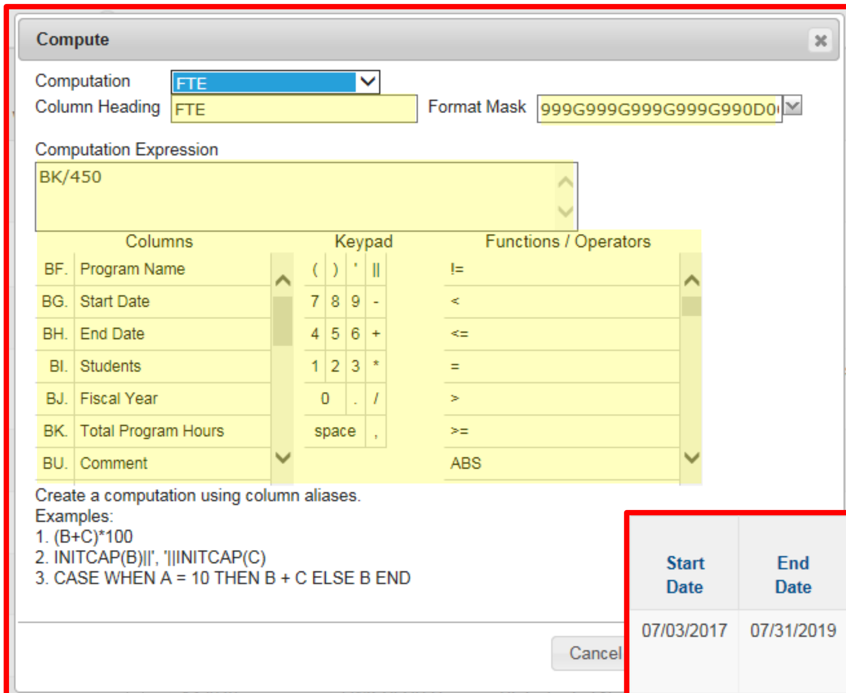
To disable the highlight, unselect the check in the box.

To delete the highlight, click the "X" in the Remove Highlight box

Format - Compute

To create a computation:

1. Click Actions
2. Select Formats and then Compute
    a. Computation – Select New Computation
    b. Column Heading – Enter name for new column
    c. Format Mask – Select format mask to apply to column
    d. Create the Computation Expression:
        i. Columns – Select column
        ii. Keypad – Use this keypad or keypad on computer
        iii. Functions – Select the appropriate function for the what you are trying to show in this column
    e. Click Apply

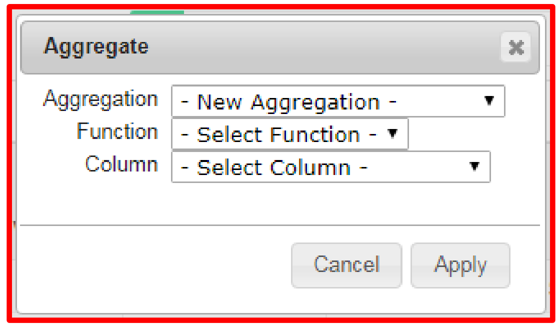


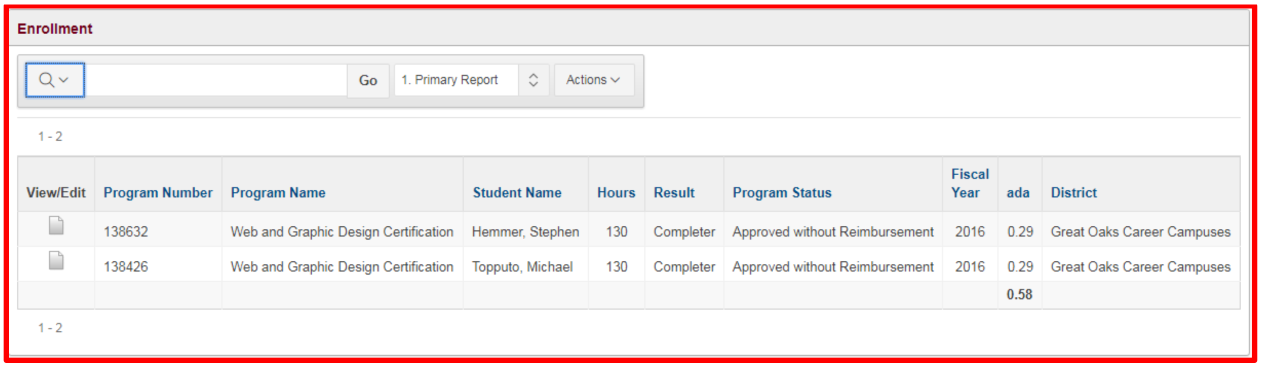
Start Date	End Date	Status	Technical?	FTE
07/03/2017	07/31/2019	Draft	N	0.22
07/03/2017	07/31/2019	Approved without Reimbursement	N	0.22
07/31/2017	07/31/2019	Draft	Y	2.00
06/06/2016	07/08/2016	Draft	Y	0.44
05/16/2017	05/23/2017	Draft	Y	0.09
05/22/2017	06/05/2017	Draft	Y	0.18

Format - Aggregation

To create an aggregation against a column:

1. Click Actions
2. Select Format and Click Aggregate
    a. Aggregation – Select New Aggregation
    b. Function – Select one of the following: sum, average, count, count distinct, Minimum or Median
    c. Column – Select column
3. Click Apply – the computation will appear at the bottom of the page.



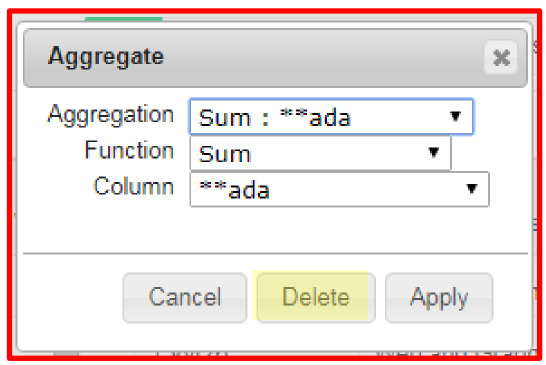


View/Edit	Program Number	Program Name	Student Name	Hours	Result	Program Status	Fiscal Year	ada	District
	138632	Web and Graphic Design Certification	Hemmer, Stephen	130	Completer	Approved without Reimbursement	2016	0.29	Great Oaks Career Campuses
	138426	Web and Graphic Design Certification	Topputo, Michael	130	Completer	Approved without Reimbursement	2016	0.29	Great Oaks Career Campuses
								0.58	

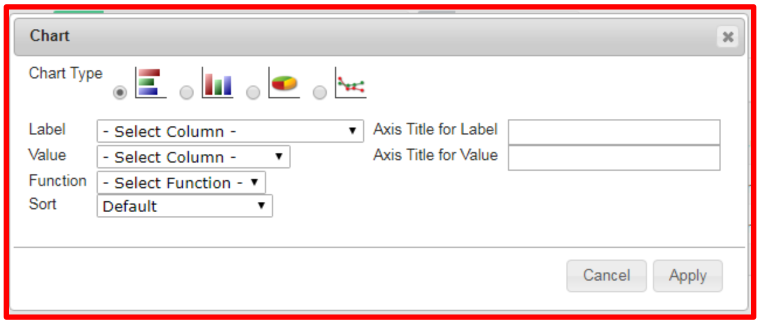
1 - 2

To remove an Aggregation:

1. Click the Actions menu
2. Select and click Aggregate
3. In the Aggregation dropdown, select the name of the Aggregation that you want remove
4. Click Delete



Format - Chart



To create a chart:

1. Click the actions menu
2. Select Format and Click Chart
3. In the chart dialog, select the appropriate options
   a. Chart Type – select the type of chart you desire: horizontal bar, vertical bar, pie or line
   b. Label – Select the column to be used as label
   c. Axis for Title for Label – enter the title to display on the axis associated with the column selected for the label (not available for pie chart)
   d. Value – select the column to be used as the Value (if your value is Count, a Value does not need to be selected)
   e. Axis title for Value – enter the title to display on the axis associated with the column selected for Values (not available for pie chart)
   f. Function – Select a function to be performed on the column selected for Value (this is Optional)
   g. Sort – Select a sorting method
4. Click Apply – the chart will appear
   a. The search bar no contains two icons; View Reports and View chart. Click these icons to toggle between chart and report views.

To edit a chart:

1. While viewing the report
   a. Click Actions and select Format
   b. Click on Chart and Edit any of the selections
2. While viewing a chart
   a. Click Edit Chart and Edit your selections and click Apply

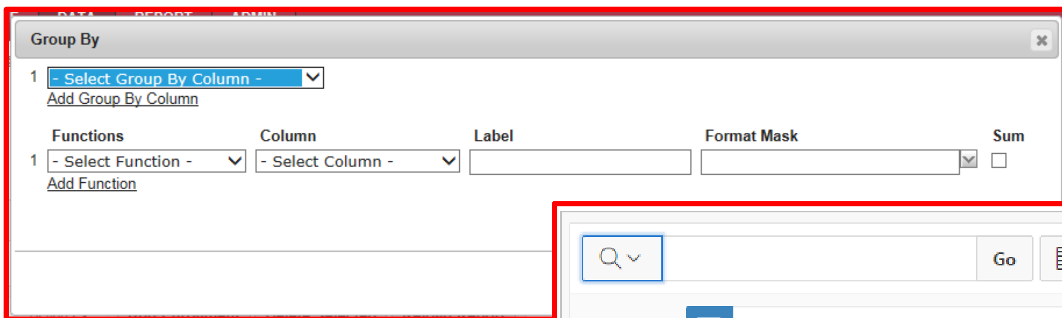
To delete a chart:

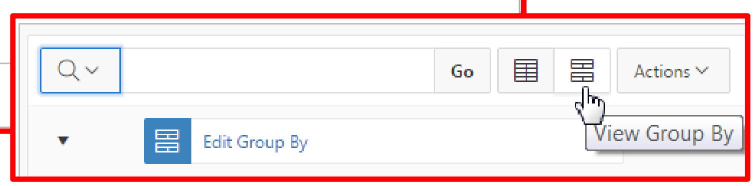
1. While viewing a report
   a. Click the Actions menu
   b. Select Format and click chart
   c. Click delete
2. While viewing a chart
   a. Click Edit Chart
   b. Click Delete
   c. You can also click the remove chart icon to the right of the Edit Chart filter

Format – Group By

To use Group By:

1. Click the Actions menu and select Format
2. Click on Group By
   a. Select column(s) to display
   b. Select the function, column, label and format mask (to add additional columns, click Add Group By Column)
      i. To create a sum, click the Sum check box. To add another function, click Add Function
3. Click Apply
   a. A Group By icon appears to the left of the Actions menu and the report displays.





To edit a Group:

1. Click edit Group By and Edit the attributes desired
2. To remove a previously defined Group by Column, select the default setting, select Group by Column
3. Click Apply

To sort a Group by Column

1. Click Actions and Select format and then "Group By" Sort (The "Group By" Sort menu is only visible when you are viewing "Group By" view.
2. Select a column, the sort direction (ascending or descending) and Null Sorting behavior (null sorting is where you want the zeros in a table to appear, at the beginning or at the end of the table)
3. Click Apply

To delete a Group By:

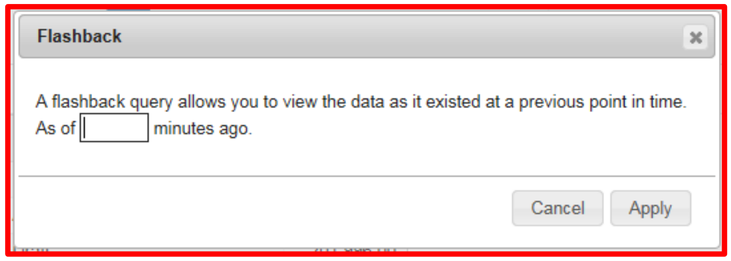
1. Click Edit Group By
2. Click Delete (you can also click the remove Group By icon to the right of the Edit Group by filter)

Flashback Query

A flashback query enables you to view the data as it existed at a previous point in time. The amount of time that you can flashback is 3 hours (or 180 minutes).

Creating a Flashback Query

1. Click the Actions
2. Select Flashback, enter the number of minutes
3. Click Apply



Editing a Flashback Query

1. Click Flashback Query filter
2. Edit Minute Ago attribute
3. Click Apply

Delete a Flashback Query

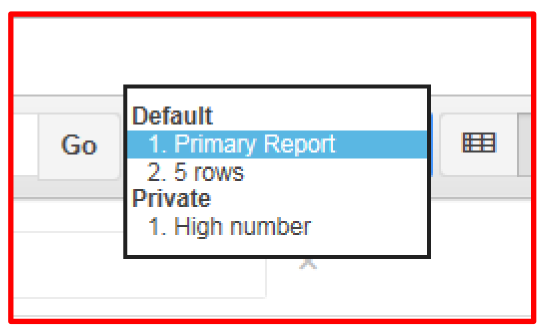
1. Click the flashback Query filter
2. Click Delete

Saving an Interactive Report

As an end user, you can save a private or public interactive report. Note: only the user who creates a private report can view, save, rename, or delete it.

Default – Primary report – is the initial report created by the application developer. Default reports cannot be renamed or deleted.

Private – High number - is a Private report. Only the user who creates a private report can view, save, rename, or delete it.



Saving a Public or Private Interactive Report

User can save an interactive report and classify it as being either:

1. Public – report can be saved, renamed, or deleted by the end user who created it. Others users can view and save the layout as another report.
2. Private - Only the end user that created the report can view, save, rename or delete the report.

To save a public or private interactive report

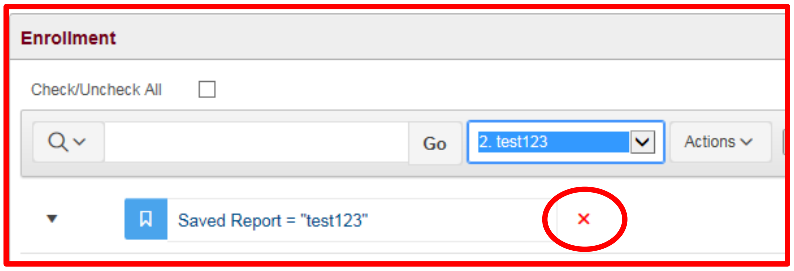
1. Go to the page containing the interactive report you want to save
2. Customize the report
3. Click Actions menu and select Save Report
4. In save Report
    a. Name – enter name for the report
    b. Description – enter an option description
    c. Public – select this check box to make the report viewable to all users. Deselect this check box to make the report private
5. Click Apply

Renaming a Public or Private Interactive Report

1. Select a public or private interactive report to rename
2. Edit the attributes of the report and the name of the report
3. Click Apply

Deleting a Public or Private Interactive Report

1. Click the Remove Report icon next to the report name link
2. Click Apply



Download - Reports

1. Click Actions menu and select download
2. Select a report Download format and follow the provided instructions