

Charter School Portal User Guide Division of School Choice



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**Office of Application Development and Support
Innovation and Technology
Florida Department of Education**

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Instructions for Using This Manual

This manual provides instructions and steps for operating the Portal. Sentence structure may seem a little different in that action verbs are used at the beginning of sentences and articles are left out. Although sentences may sound cryptic at times, the goal is to keep instructions clear, concise, short and to the point!

Standard Instruction Text:

Steps	Provide step-by-step instructions to accomplish a task or function while using the Portal.
Optional	Step that can be implemented or omitted.

Standard language in steps to perform a task:

- Click button; e.g., click “Delete”.
- Select; e.g., select desired option in dropdown.
- “Press key” or “key combination” on the keyboard is displayed in square brackets; e.g., Press [Enter].
- Check or uncheck box for option.
- Text displayed in quotations and italics should be replaced with actual content.

The Portal is permission-based; therefore, functions are available based on assigned roles and permissions. Please note that some of the systems are designed to automatically time out after **20** minutes of non-activity.

Prior to working with these features, you must familiarize yourself with a few helpful items:

- Accessing the system
- Understanding the home page
- Terms you should know

If working with Personal Identifiable Information (PII data), AKA “confidential information,” the data must be password protected and saved in a separate document prior to forwarding. Confidential information includes an individual's name or social security number in combination with other identifiable data such as a driver's license or Florida student ID, account or credit/debit card numbers.

Section 1: Learning the Basics

The Florida Department of Education's (FLDOE) Charter School web Portal provides easy access to manage Charter School data for FLDOE.

Accessing the Portal

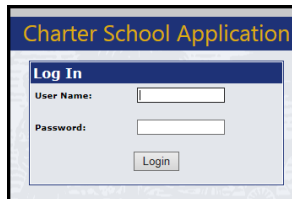
In order to login to the Portal, you must be granted access. To do so, contact your Supervisor or the DOE Personnel Office Representative. They will send a request to the Helpdesk at Helpdesk@fldoe.org, which includes your last name, first name and permission level. User Permissions consist of:

- Read-only- provides user ability to only view the data.
- Liaison- provides user ability to add, edit and delete records.

Once it is confirmed that you have access, follow the steps below for First-Time Users, listed below. **Note:** This Portal has better performance working with the Internet Explorer Browser.

Steps to Log in as a First-Time User

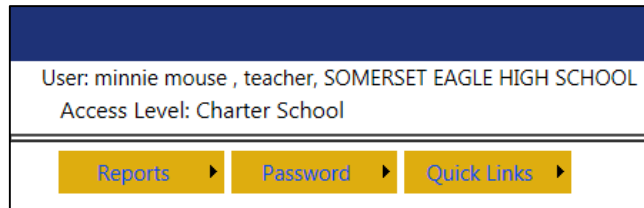
1. Open: Internet Explorer (IE).
2. Type: the URL in the IE address bar and press [Enter]. The Login page displays.



3. Enter: User name and Password. Main Menu displays.

Exploring the Main Menu

The Charter School Portal Main Menu provides access to reports (accountability, audit and capital outlay), change password and quick links.



Menu Options and Permission Access Levels

Menu Option	Description	User Access Levels
Reports	Audit Report New Charter School Portals Capital Outlay Plan Summary Report	Charter School: Add, edit, and submit report data for assigned school.

Menu Option	Description	User Access Levels
		District Admin: <ul style="list-style-type: none"> • Add, edit, & submit district comments for assigned schools within the district. • View only for schools assigned within the district. DOE Admin-Full-rights: Add, edit, enter comments, upload document and submit.
Change Password	Allows the active user to change their password.	Edit/Update
Quick Links	Provides access to helpful websites.	NA
Help	Provide access to reference material as it relates to navigating in the system.	Charter School District Admin DOE Admin
Log Out		Charter School District Admin DOE Admin

Closing the Portal

To exit the system click Log Out hyperlink located on at the top right corner of the page.



Section 2: Reports Module

Accountability Report

The Accountability Report, located under “Reports” on the menu, provides ability to update charter school information, contacts, governing board information and board members. The Master School Identification Data (MSID) for the school can also be viewed on this screen. Here, the user can verify and compare the MSID data with the current system’s data. Modifications can be made in the report as often as needed prior to submitting. If the report is submitted and additional modifications are needed, the user must contact the DOE Administrator to unlock the report.

Helpful Tips for Entering Data

When entering data, there are a few helpful tips that may assist with entering data correctly:

- Use <Next> and <Prev> to navigate from page to page. Please do not use the Internet Explorer Back button.
- Each module of the Accountability Report must be complete and **saved** in order to submit the data to the DOE. Once all modules have been saved, both the “Submit” and “Print” buttons will display at the bottom of the Main Menu screen.
- Required fields denoted with a red asterisk (*) will stop the system from saving if not complete or if it is incorrectly filled-in; error messages will display.
- Phone number must include the area code and entered without alpha-numeric characters.
- When entering dates: Dates can be selected using the calendar icon or can manually entered using the format mm/dd/yyyy.
- The comment box displayed below is used to enter any comments regarding the data.
- Educational Focus as well as Partnership(s) can have multiple selections.
- Governing Board FEIN: a maximum of nine numeric characters are allowed.
- After entering Governing Board data, click “Add” to create board members.
- MSID is Read-Only data and therefore cannot be modified through this system.
- **Remember: Once all data is entered into the accountability report, the user must click Submit on the main menu in order to electronically send the data to the DOE.**

Accountability Report

Charter School Application

[General Information](#)

[Partnership, Specialty Area & Management](#)

[Governing Board](#)

[Lottery and Student Membership](#)

[Personnel Data](#)

[Personnel Summary](#)

[Facilities Data and Ownership](#)

[Financial Audit Report](#)

[Financial Recovery Plan](#)

[School Grades](#)

Comments Section

Comments:

Steps to Submit

Enter Data and

1. Click Reports on the Main Menu and select Accountability Report. Main Menu displays.
2. Click First option on the menu. Page displays.
3. Enter data and/or select options.
4. Click Save. Confirmation page displays.
5. Click <Next> hyperlink located at the top right of the screen. Page displays.
6. Repeat steps 2 - 4 until all modules are complete and have been saved.
7. Return to Main Menu.
8. Enter Comments.
9. Click Save. Confirmation message displays. Submit and Print buttons display on the screen.
10. If you are ready to submit the data to DOE, click Print.
11. View both the online data and printed version to ensure accuracy.
12. When ready, click Submit. Confirmation message displays.

Audit Report

The Accountability Report, located under “Reports” on the menu provides ability to upload audit report documents. Only PDF documents are allowed to be uploaded. Prior year audit report data can also be viewed through this screen by selecting a year from the drop-down, then clicking “Open” for the desired year in the results grid.

Financial Audit Report

Financial Audit Report
Audit Report Upload

Select File to Upload:

Select School Year:

PDF files only. Maximum size: up to 4MB. Uploading may take several minutes, please wait.

Last Modified By:
 Date Modified:

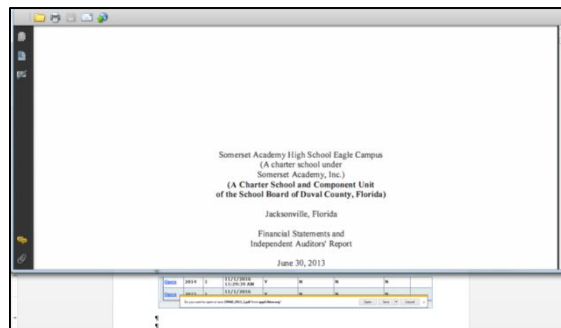
File	Fiscal Year	Version	Submitted Date	Approved for Website	Financial Emergency	Deteriorating Financial Condition	Going Concern	Comment	Reviewer Name	FCO Reviewer Status	FCO Reviewer Name	FCO Reviewer Comments
Open	2013	1	11/1/2016 11:29:37 AM	Y	N	N	N		560	Y	636	
Open	2014	1	11/1/2016 11:29:39 AM	Y	N	N	N		560	Y	657	

Steps to Upload Audit Report

1. Click Reports on the Main Menu and select Audit Report.
2. Click Browse. MS dialog box displays.
3. Locate and select file. Click "Open". File name displays in field.
4. Click Upload. Confirmation message displays. Hyperlink for the uploaded document displays in results grid.

Steps to View Audit Report

1. Verify Audit Report on the Main Menu and select Audit Report.
2. Click Open for desired report. MS Office dialog box displays at the bottom of the screen.
3. Click Open to review the document. Close document when complete.



Capital Outlay Report

Capital Outlay Report, located under reports on the menu provides ability enter data, and submit the charter school's capital outlay information. This information must be submitted before the state deadline or else the system will lock the screen from editing.

Capital Outlay Report

2016-2017 Capital Outlay Plan

This form must be completed and provided to the Florida Department of Education by July 1 for consideration to receive Charter School Capital Outlay funds, Pursuant to Section 1013.62, Florida Statutes. Upon completion and submission of this form (you are responsible for completing each section) it will be sent electronically to your sponsor for review. Your sponsor will review and certify the information in Section 1. The Department will then review and consider the sponsor's recommendation and make the eligibility determination.

School Opened in: 2016-2017

Section 1:

Yes No Did the school receive capital outlay funding for the 2015-2016 school year?

The charter school's sponsor can verify that (both criteria apply):

Yes No (a) There exists an agreement with the charter school that includes provisions for the reversion of any unencumbered funds and all equipment and property purchased with public education funds to the ownership of the district school board in the event that the school terminate operations.

Yes No (b) The charter school facilities were not created by the conversion of a public school, does not operate in facilities provided by the charter school's sponsor for a nominal fee or at no charge, and is not directly or indirectly operated by the school district.

CERTIFICATIONS:
CHARTER SCHOOL REPRESENTATIVE

First Name: Last Name:

Comments:

As representative of the charter school, I certify that all information indicated above is accurate and current.

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Steps to Enter Capital Outlay Data

1. Click Reports on the menu and select Capital Outlay.
2. Enter and select desired data.
3. Click Save. Confirmation message displays

Steps to Edit a Capital Outlay Data

1. Click Reports on the menu and select Capital Outlay.
2. Modify desired data.
3. Click Save. Confirmation message displays

Managing Passwords

The “Change Password” screen provides ability to edit your password at any time. The stronger the password, the tighter the security is for the Portal. Be sure to use the following requirements when selecting a password:

- Must be at least eight characters
- Must contain at least one number
- Must contain at least one of the following characters: { (@ # \$ ^) } ? &

Change Password

Current Password:

New Password:

Confirm Password:

New password must be at least 8 characters and 1 num

Steps to Change Password

1. Click Maintenance then Change Password on the menu. Screen displays.
2. Type the current password in Current Password field.
3. Type the new password.

4. Type the new password again in the Confirm Password field.
5. Click Submit. Confirmation message displays.

Working with Quick Links

Quick links are provided for the user to easily access helpful web sites. To access the links, click “Quick Links” on the menu, then select the desired option. The system will then open the website in a separate window

