2016-17

Self-Study Training Manual
Online Transcript Entry and Evaluation System (OTEES)
Private Schools

Florida Department of Education
Office of Student Financial Assistance (OSFA)
www.FloridaStudentFinancialAid.org

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A. Introduction

The Online Transcript Entry and Evaluation System (OTEES) is an electronic system used to evaluate official transcript data submitted by Florida public high schools and eligible private schools to the Florida Department of Education (FDOE). OTEES evaluates transcript data and makes available an evaluation report for students in grades 9 - 12.

OTEES allows counselors to:

- Provide evaluation reports to students and parents; and
- Match ***Florida Financial Aid Applications*** (FFAA) to student transcript records.

Private high schools enter transcript data manually. Transcripts should be updated in OTEES three times per year:

- Fall, after schedules are finalized;
- Start of second semester; and
- End of school year.

B. Evaluations

Early Evaluation is an evaluation after the 7th semester of a student's senior year. Information submitted from grade 9 through the end of the first semester of the senior year is called Early Evaluation.

During Early Evaluation counselors may:

- Update and correct information on student transcripts;
- Provide transcript audits to discuss academic progress with students including grade point average (GPA) and ACT®/SAT® test scores through January 31;
- Match demographics on the FFAA and transcript;
- Enter service hours earned on or before January 31 of the senior year; and
- Submit courses in progress for the 8th semester.

Official college entrance exam scores on the ACT®/SAT® are received from the test repository and displayed on the Student Evaluation Report.

Final Evaluation is an evaluation following the 8th semester of a student's senior year. This evaluation includes transcript data from all high school coursework submitted, including the total service hours and test scores through June 30.

During the final evaluation counselors may:

- Update and correct information on student transcripts;
- Match demographic data on the FFAA and the transcript; and
- Enter service hours earned through June 30 of the senior year.

Official college entrance exam scores on the ACT®/SAT® are received from the test repository and displayed on the Student Evaluation Report.

Finish data clean-up and processing before leaving at the end of the school year as initial eligibility Final Evaluation processes run during the summer months.

Mid-year Graduates are students who graduate between September 1 and January 31 of an academic year and plan to enroll at an eligible Florida postsecondary institution in the spring of the same academic year. For example, a mid-year graduate who desires funding for the spring of 2018 must complete the 2017-18 FFAA by August 31, 2017. The student must meet all scholarship requirements applicable for the academic year in which the student graduates. Service hours completed by high school graduation and test scores for test dates through January 31 will be considered in a mid-year graduate's final evaluation. If a student does not graduate mid-year as planned, the student must submit an FFAA for the following academic year.

C. Navigating to the Online Transcript Entry and Evaluation System (OTEES)

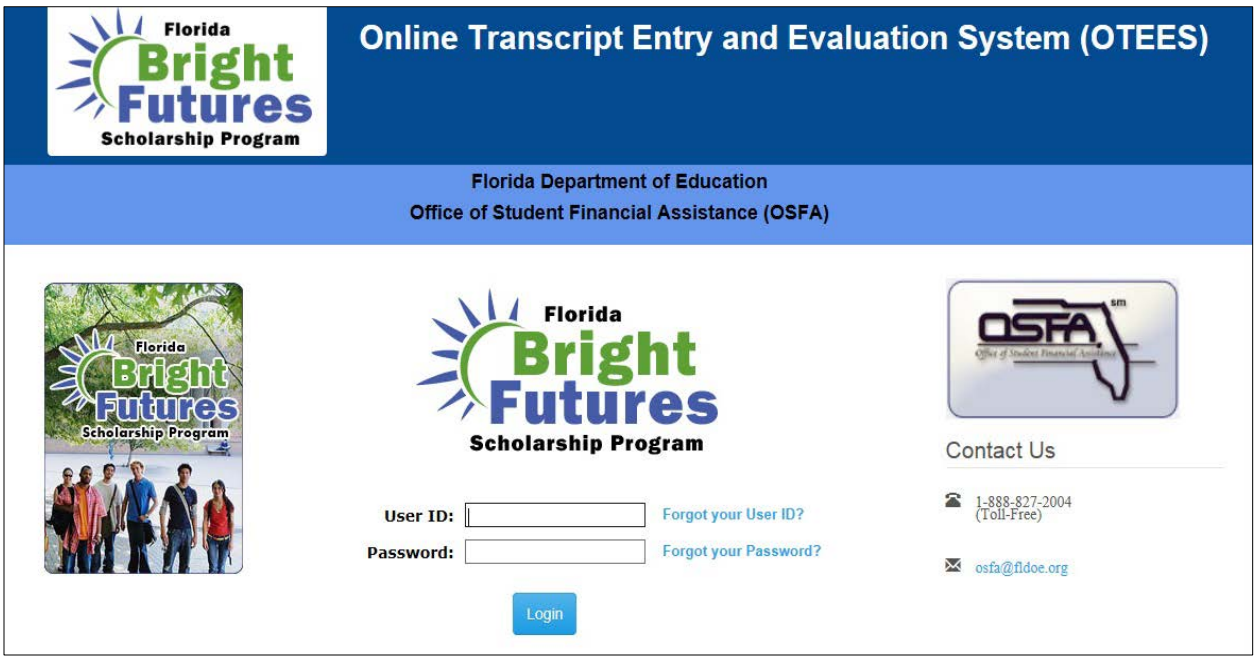
Accessing OTEES

- From www.FloridaStudentFinancialAid.org, go to **State Grants, Scholarships & Applications**
- Select **Bright Futures Scholarship***

- Under **Administrator Quick Links**, select **Login to the Online Transcript Entry and Evaluation System.**

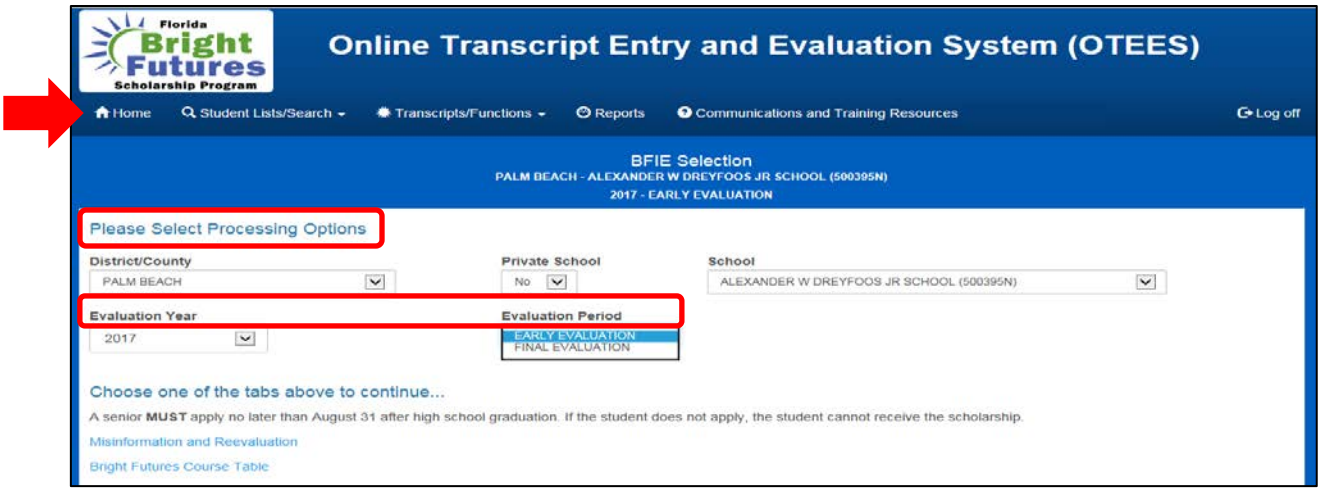
- Authorized users will be required to login with their assigned User ID and password to access the secure pages within OTEES.

After signing onto OTEES for the first time, the password must be changed. If you are unable to use the "Forgot your Password?" prompt, contact a Security Designee for assistance.



D. OTEES Home Page

Please Select Processing Options provides a drop-down menu for the Evaluation Year and Evaluation Period. The **Evaluation Year** is the student's expected year of graduation. For example, students graduating during the 2016-17 academic year will have an **Evaluation Year of 2017**. Use the drop-down arrows in the processing option fields to make selections.
Use the menu bar and embedded links for navigating after choosing the processing options.



E. Transcripts/Functions

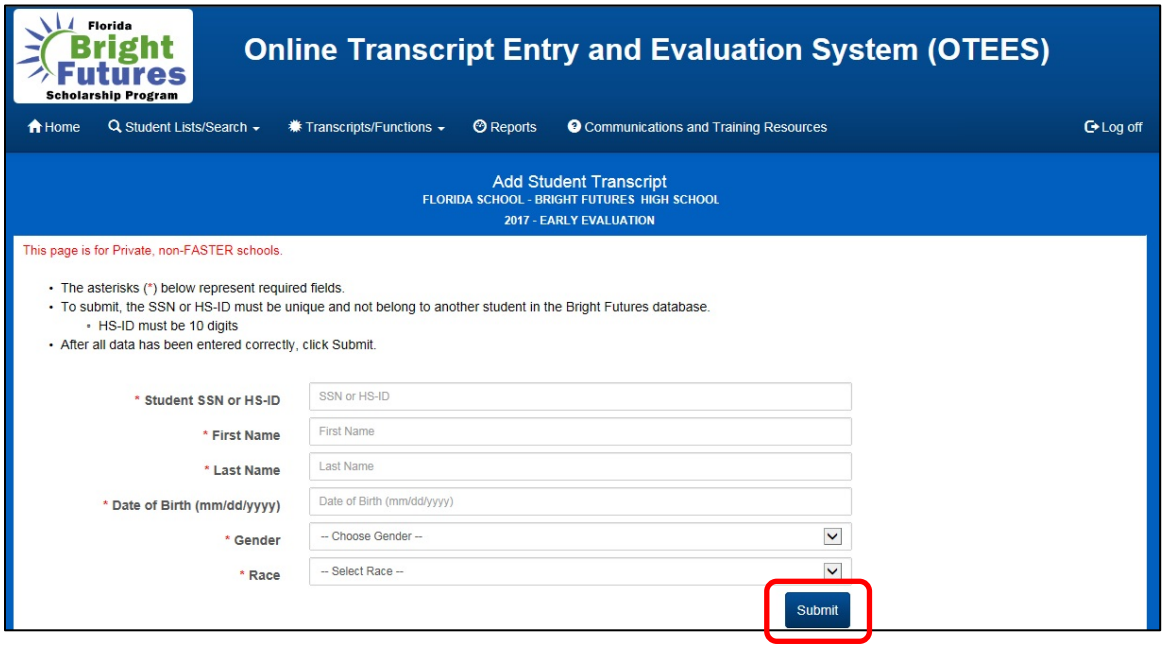
Transcripts/Functions allow private school counselors access to manually enter transcript data and update the graduation date for all current year graduates.

1. Add Student Transcript

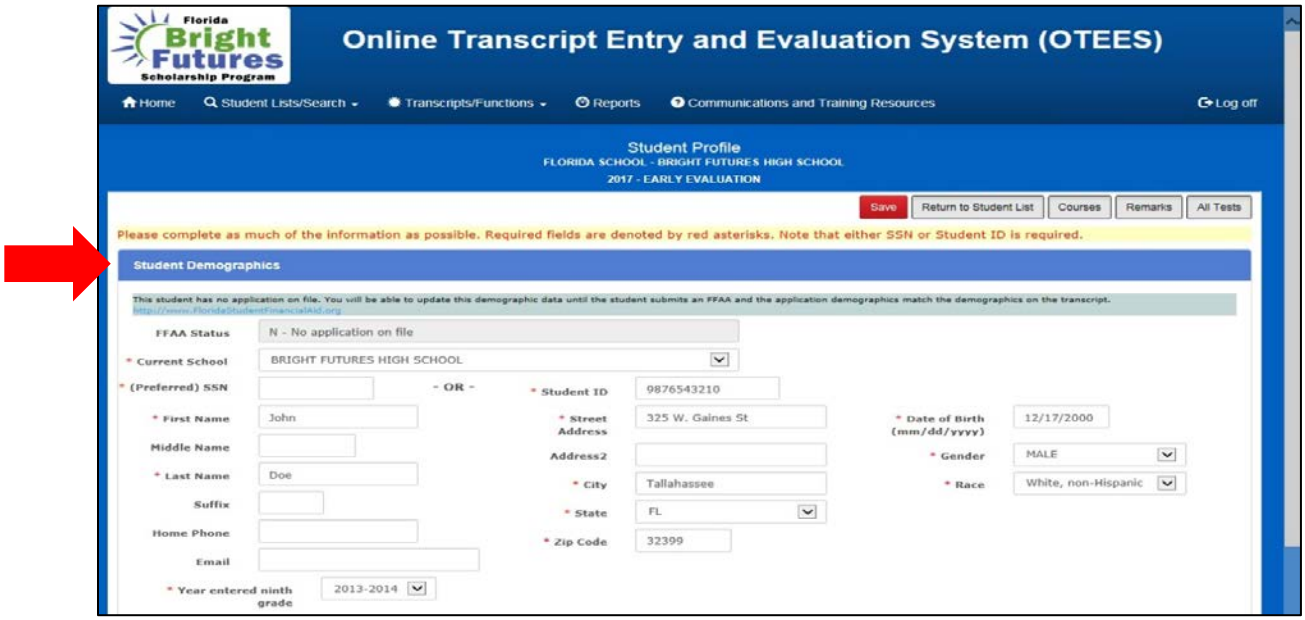
Under the **Transcripts/Functions** tab, select **Add Student Transcript**.

The **Add Student Transcript** screen will display. All student demographic fields, denoted by red asterisks, are required to proceed and used to match the student's transcript with their **Florida Financial Aid Application (FFAA)**. The first field, **Student SSN or HS-ID,** requires either the

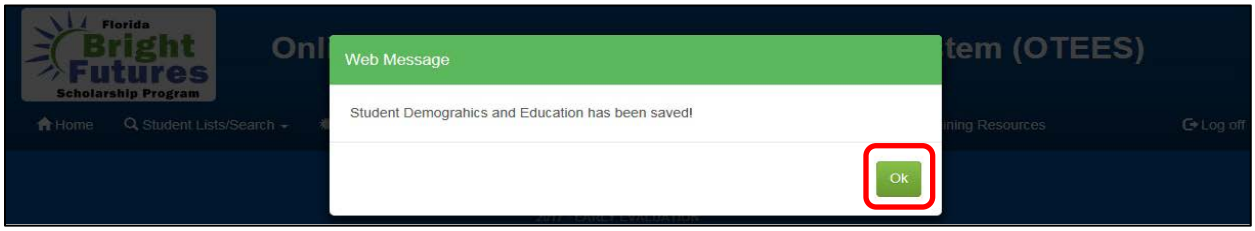
student's unique Social Security Number (SSN) or a unique 10 digit High School Identifier (HS-ID). After all data has been correctly entered, select the blue Submit button.



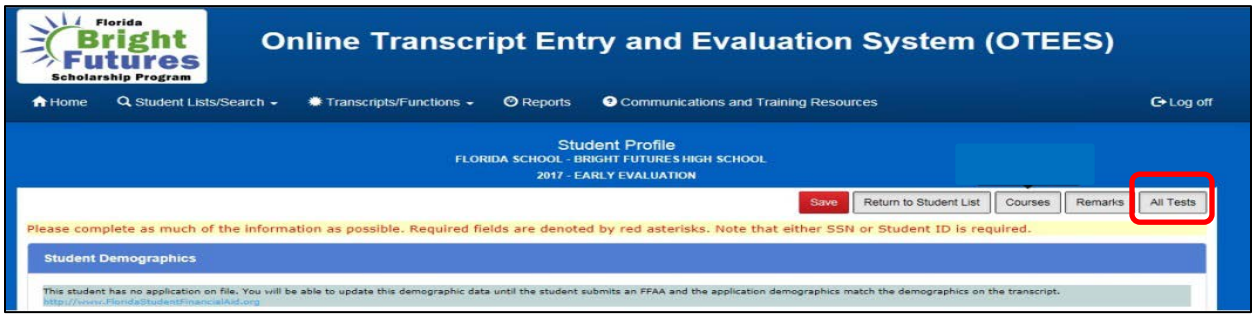
After the student demographics are successfully submitted on the **Add Student Transcript** screen, the **Student Profile** screen will display. If the student has an **FFAA** on file, the remaining student demographics will automatically be prefilled on the **Student Profile** screen. If there is no **FFAA** on file for the student, you will be prompted to enter the remaining student demographics in the required fields, denoted by red asterisks. Once all required student demographic fields are filled, select the red **Save** button at the top of the screen.



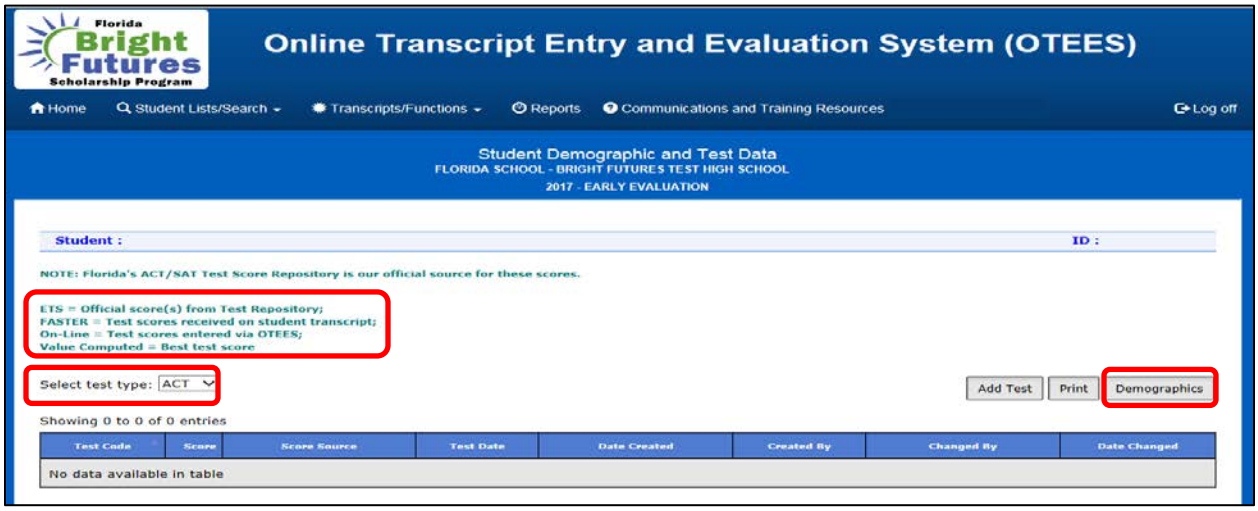
A pop up Web Message box will display confirming **Student Demographics and Education has been saved**! Select Ok.



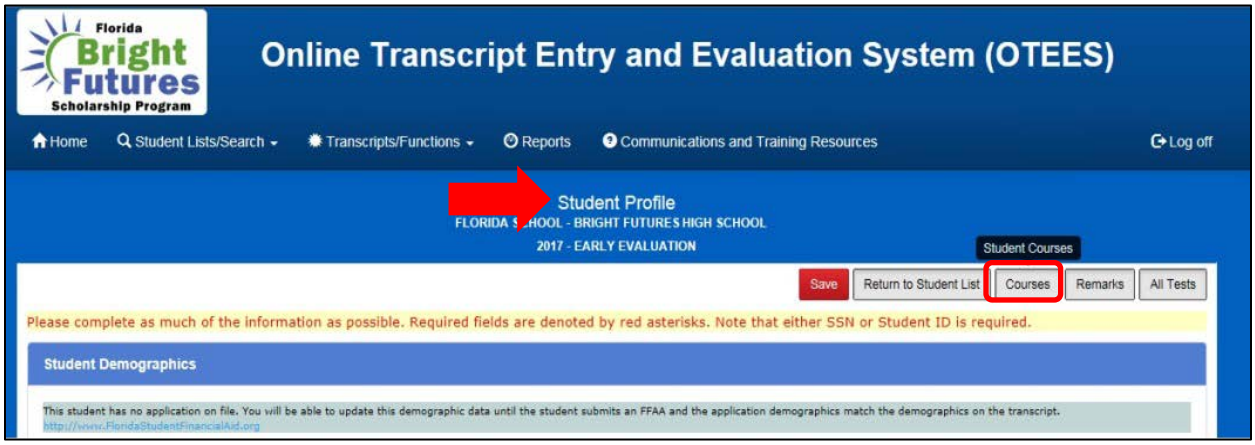
To view or edit test scores, choose **All Tests** at the top of the **Student Profile** screen.

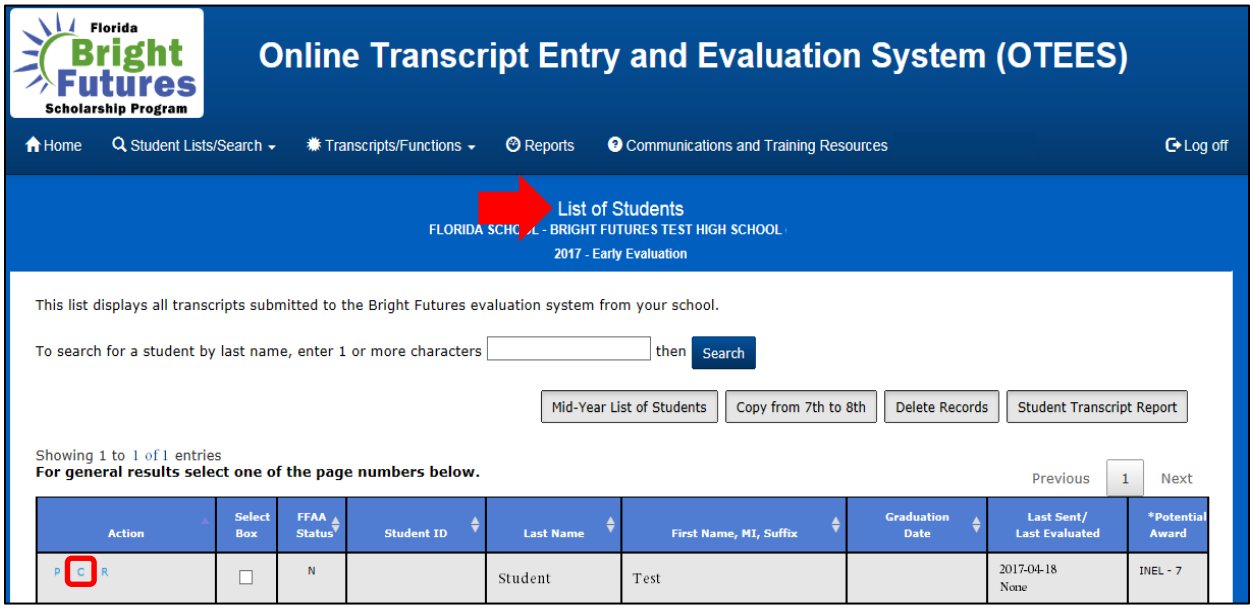


The Legend at the top of the page assists with interpretation of Score Source and Value Computed (Score). **Select test type** provides access to ACT®, SAT® and PERT test scores. **Demographics** is used to return to the previous page.

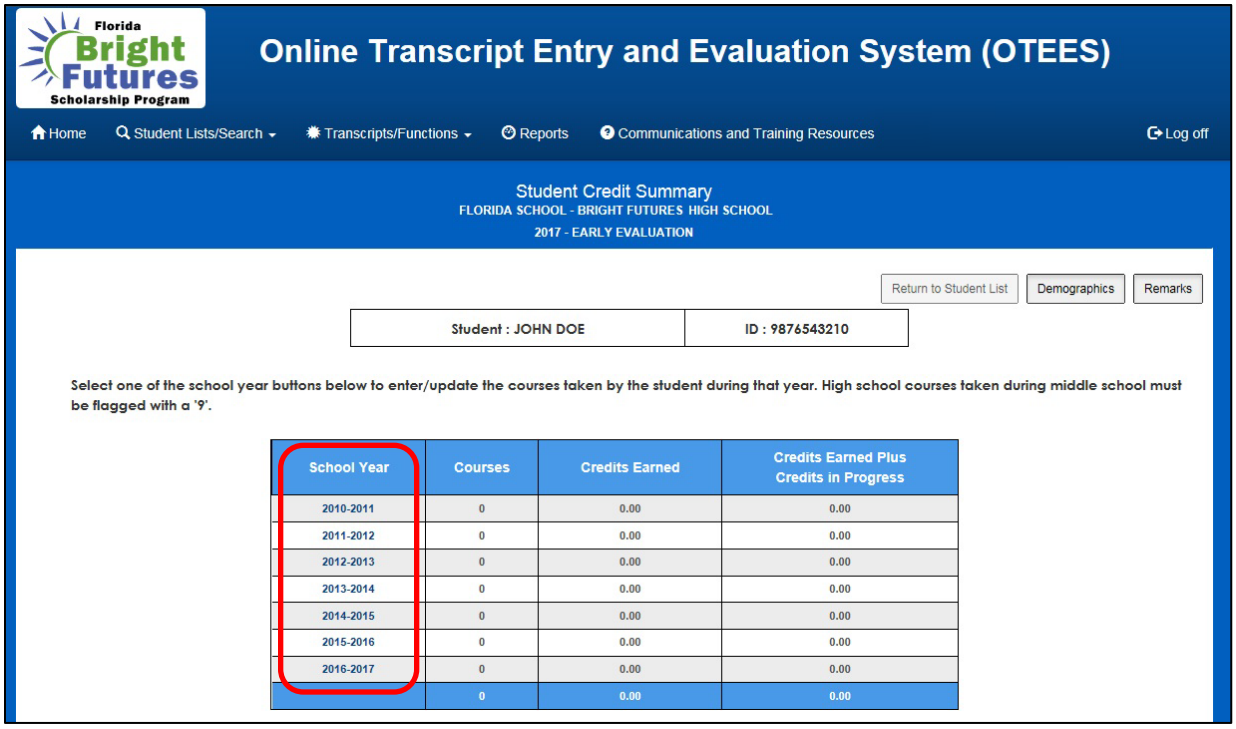


Access to add a course is located at the top of the **Student Profile** screen by selecting **Courses** or on the **List of Students** screen by selecting the **Action** code **C (Course Summary).**

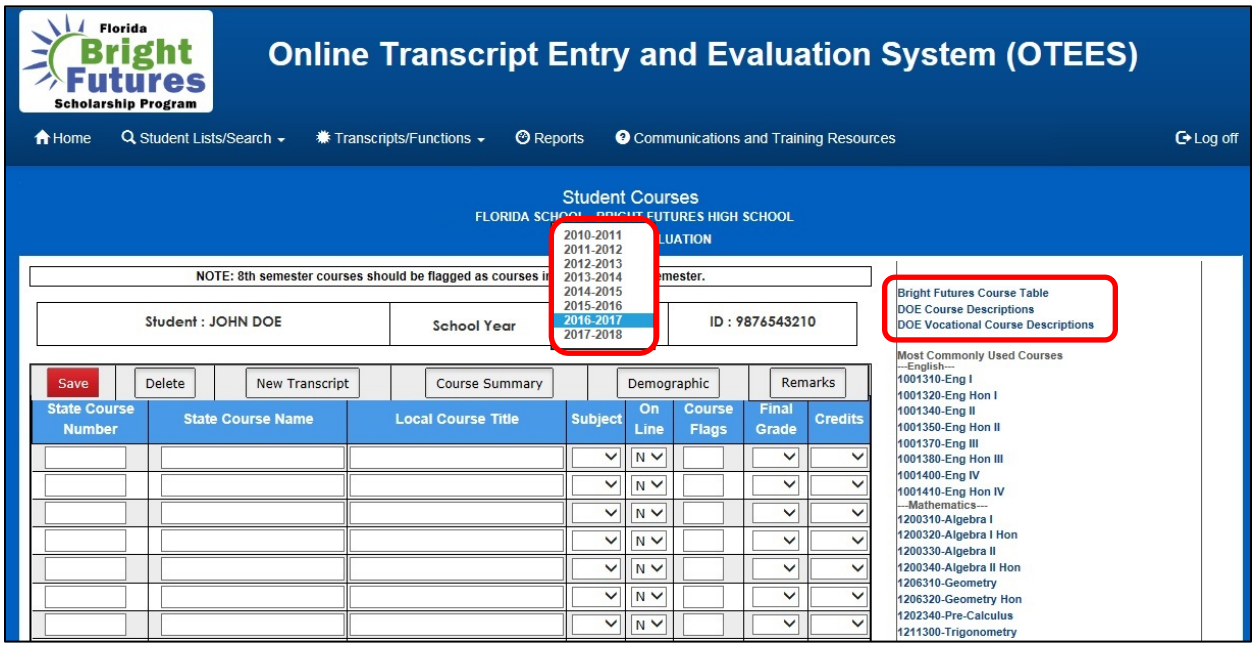




The **Student Credit Summary** screen will display. On the chart displaying the summary of the total **Credits Earned** by academic **School Year**, under the **School Year** column, select one of the school year links to enter/update the courses taken (or that will be taken) by the student during that academic School Year.



The **Student Courses** screen will display a table for the academic **School Year** selected. Use the **School Year** drop down box to display a table for a different academic **School Year**. Links to the **Bright Futures Course Table**, **DOE Course Description** and **DOE Vocational Course Descriptions** are located on the right side of the screen.

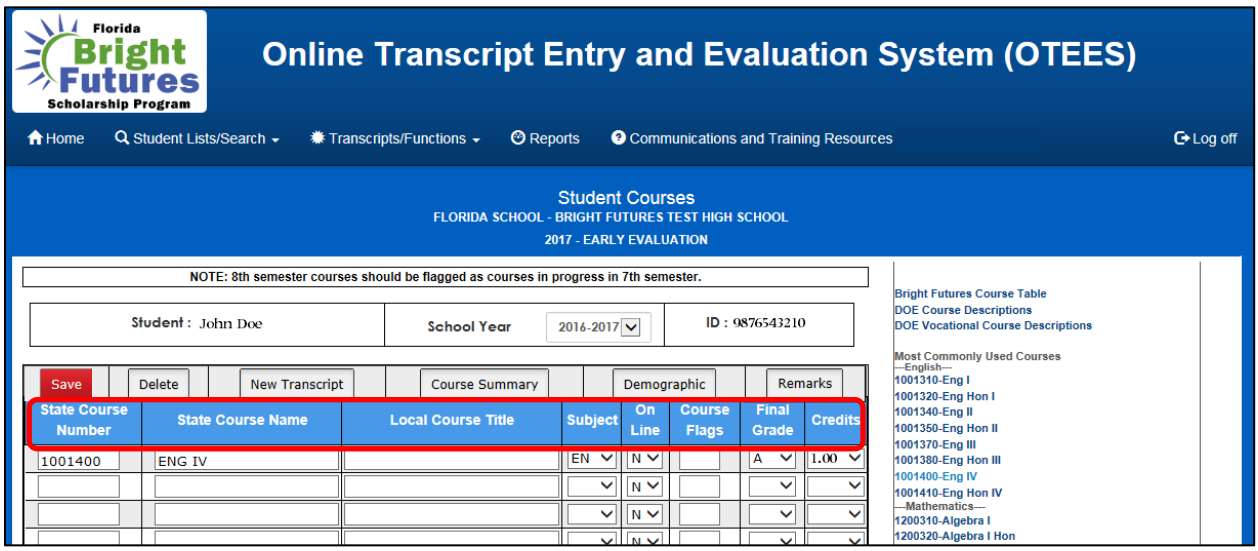


Button	Description
Save	Saves the courses entered in the table.
Delete	Irrevocably deletes all courses in that academic school year for the student.
New Transcript	Displays the Add Student Transcript screen.
Course Summary	Displays the Student Credit Summary screen for the student.
Demographic	Displays the Student Profile screen for the student.

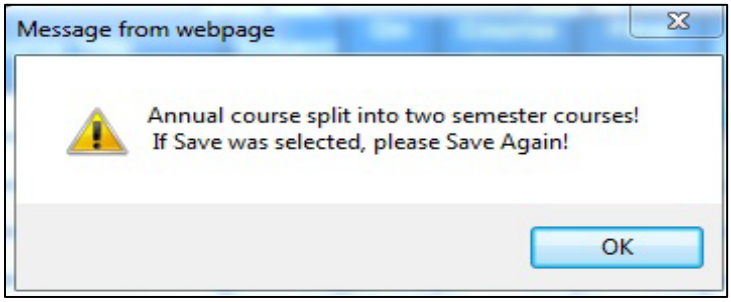
Column Header	Description
State Course Number	The seven character course number uniquely identifies the course within the state of Florida. Course numbers with numeric characters are secondary courses and courses that include alpha characters are postsecondary (dual enrollment) courses. Lists of the most commonly used courses by subject area are on the right side of the screen. Selecting a course from the commonly used courses list auto-fills the table with the State Course Number, State Course Name and Subject area.
State Course Name	The title of the course may be abbreviated.
Local Course Title	The title of the course assigned by the high school.
Subject	The course subject area as designated by Course Code Directory (CCD). The course subject area as designated by State University System (SUS).
OnLine	N (no) Y (yes)
Course Flags	High school courses taken during middle school must be flagged with a '9'. The 8th semester courses should be flagged as courses in progress in 7th semester with a 'P'.
Final Grade	The fall and spring grade the student earned for each term.
Credits	The maximum credit a student earned for the given course. Each line can have a maximum of .5 credits assigned. Entering 1 credit will automatically split the course line into two separate lines and assign each line a value of .5 credits.

To use the **Most Commonly Used Courses** list, select the next available field under the **State Course Number** column then select a course from the **Most Commonly Used Courses**. The following columns will auto-fill: **State Course Number**, **State Course Name** and **Subject**. The State Course Number, State Course Name and Subject can all be entered manually as well.

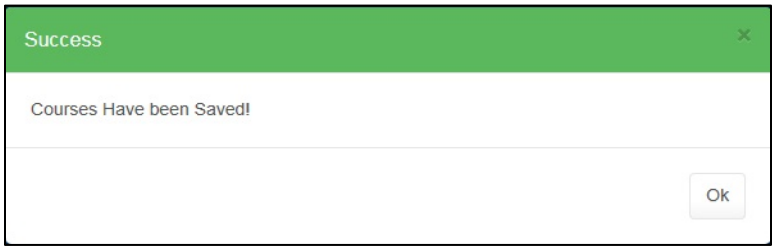
Enter data in the Course Flags column as necessary. High school courses taken during middle school must be flagged with a ‘9’. The 8th semester courses should be flagged as courses in progress in 7th semester with a ‘P’. You will need to select the **Final Grade** and **Credits** from the corresponding drop down box.

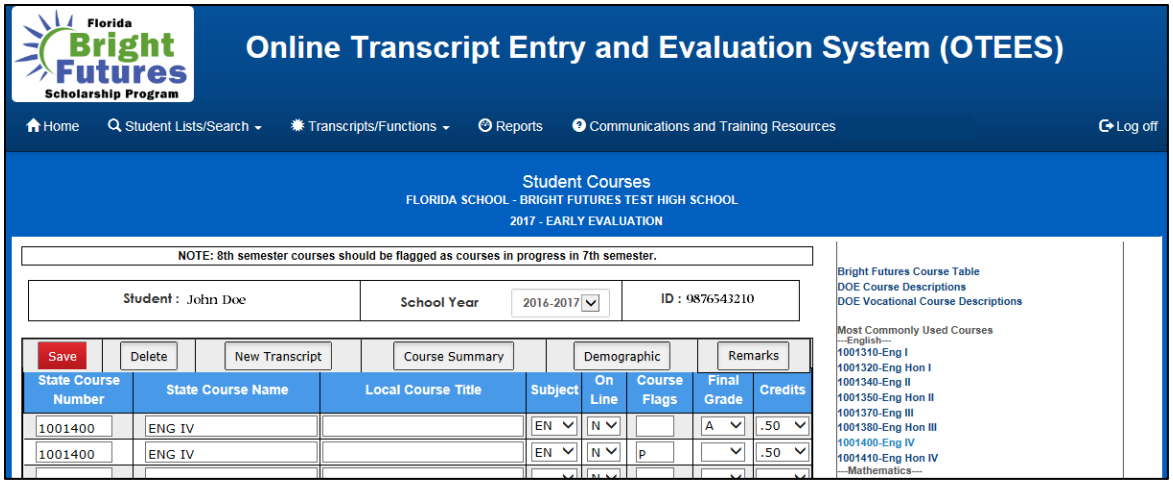


After selecting 1 credit from the drop down box and selecting Save or another field a pop-up Message box will appear, indicating **Annual course split into two semester courses! If Save was selected, please Save Again!**



To save data entered in the table, the State Course Number, State Course Name, Subject, Final Grade, and Credits columns must be complete. Select Save and a pop-up message box will display, indicating **Courses Have been Saved!**

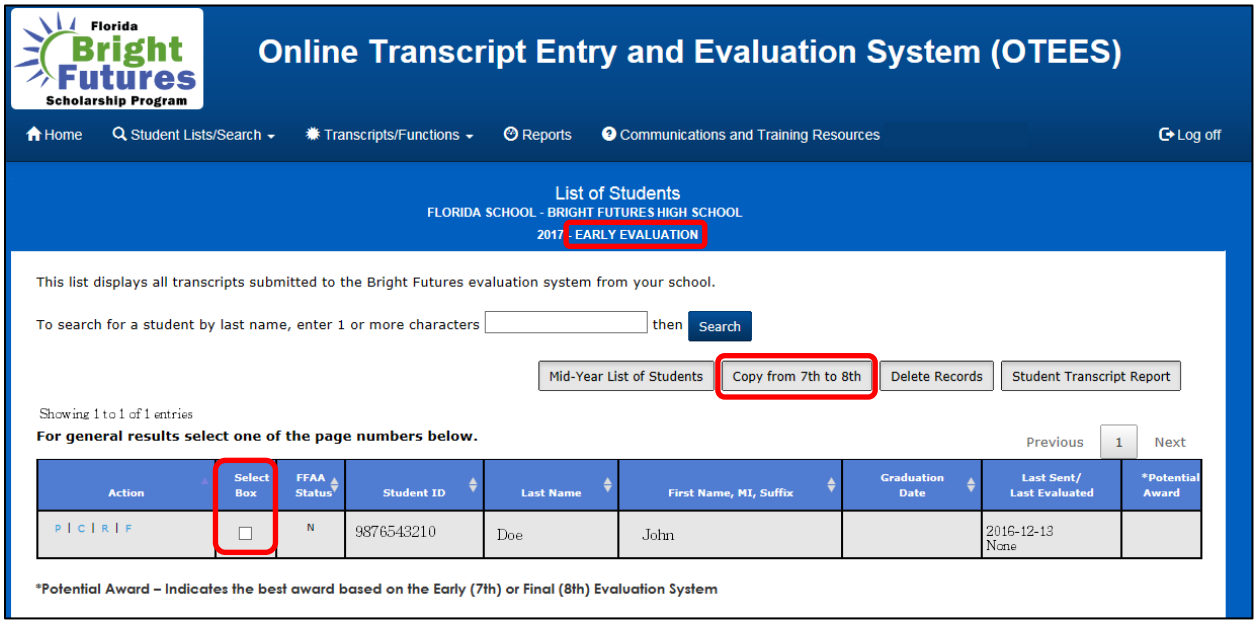




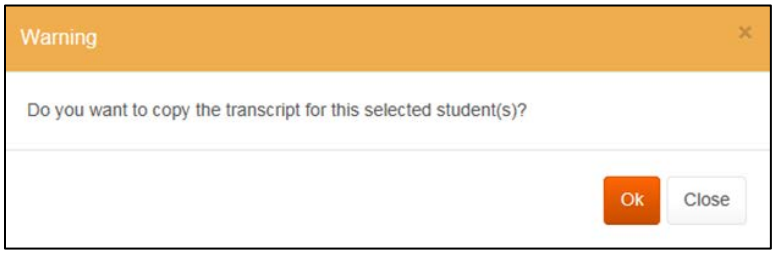
When 7th (Early) semester transcript data has been entered and 8th (Final) semester courses flagged as in progress (Courses Flags column – "P") the user may copy the transcript by selecting **" Copy from 7th to 8th."**

In **Early Evaluation** on the **List of Students** screen, use the **Select Box** column to select up to 10 students per page and then select the **Copy from 7th to 8th** button.

Transcript records should be copied from 7th to 8th when all transcript data has been updated and 8th semester courses are flagged as courses in progress in 7th semester.

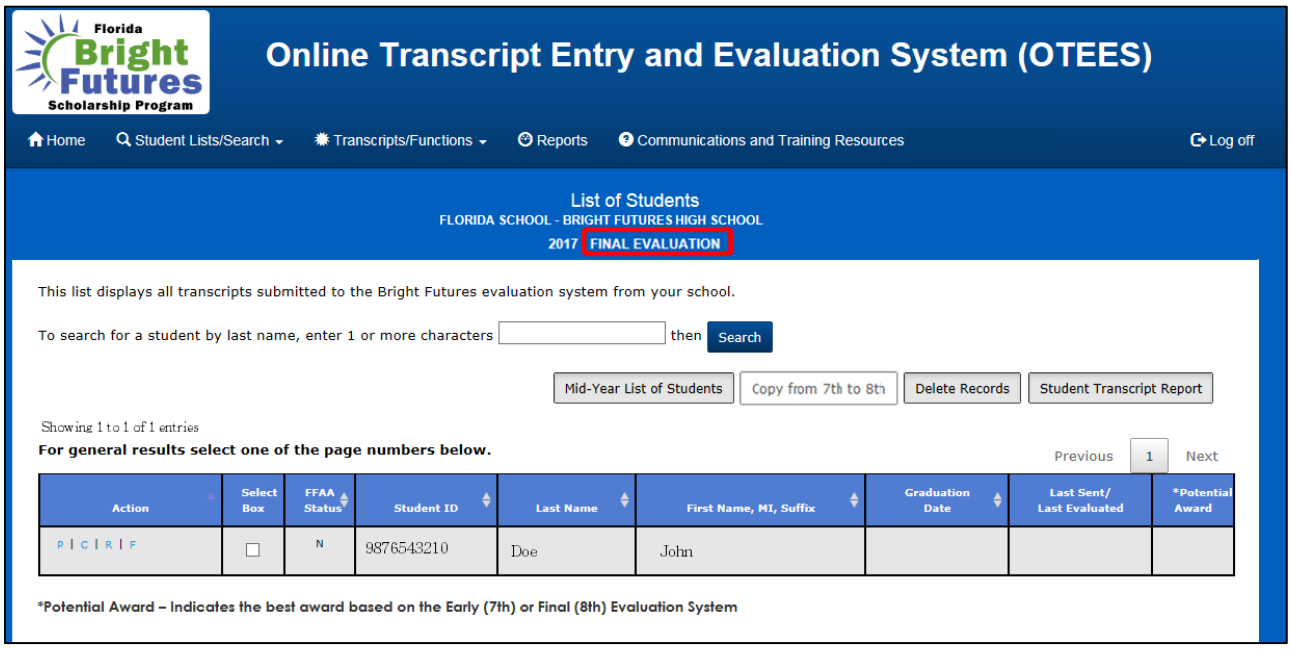


A Warning message box will display asking, **Do you want to copy the transcript for this selected student(s)?** Select OK.



A **Success** message box will display, confirming the **student transcript(s) that were copied successfully**.

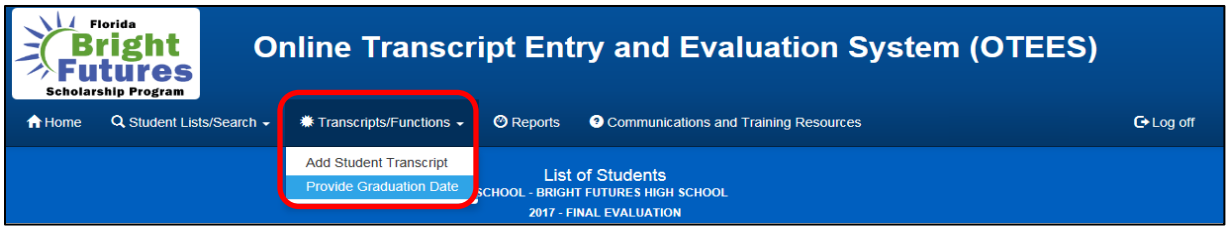
The student record will now display in both Early and Final Evaluation.



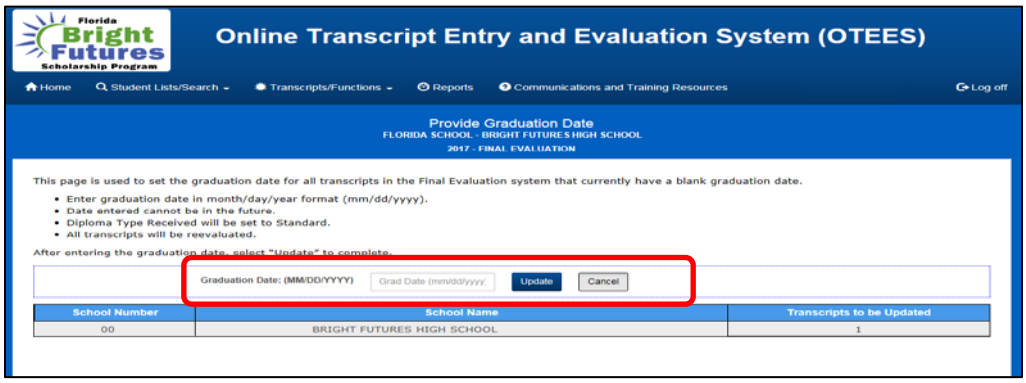
Remember, once a record is copied from **Early** to **Final Evaluation**, any new edits/changes made to the **Early Evaluation** record must also be made in **Final Evaluation**.

2. Provide Graduation Date

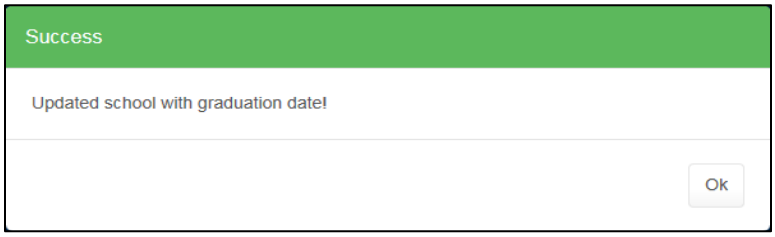
To add the graduation date to all transcript records, in **Final Evaluation,** under the **Transcripts/Functions** tab, select **Provide Graduation Date.**



The **Provide Graduation Date** screen will display.



Enter the graduation date in the month/day/year format and select Update. The date entered cannot be in the future. The Diploma Type Received will be set to standard. A Success message box will display indicating the graduation date was updated. Select Ok. All Transcripts will then be reevaluated.



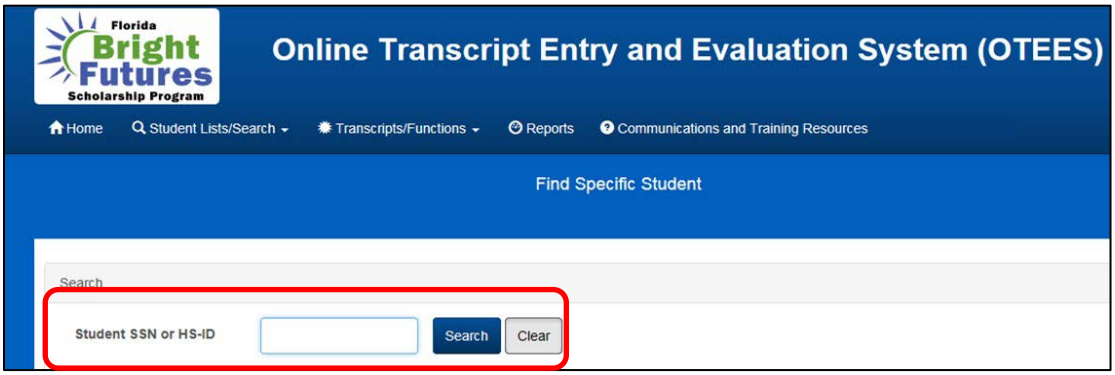
F. Student Lists/Search

Student Lists/Search provides a counselor access to student transcripts already entered in OTEES.

1. Find Specific Student

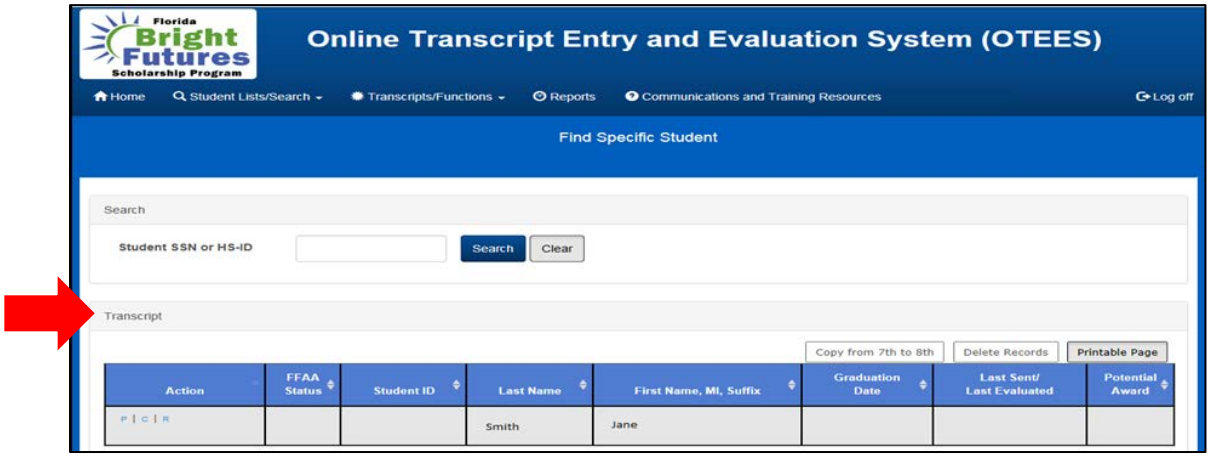
To search for an individual student's transcript, select **Student Lists/Search** and **Find Specific Student.**

On the **Find Specific Student** screen, enter the Social Security Number (SSN) or High School Identification Number (HS-ID) and select **Search**. Note: Select **Clear** before searching for an additional student.



If the student has a transcript in both early and final evaluation, the evaluation period will need to be selected from the message box.

The individual student transcript data will be available in the **Transcript** section.



a. Column Headers: Action

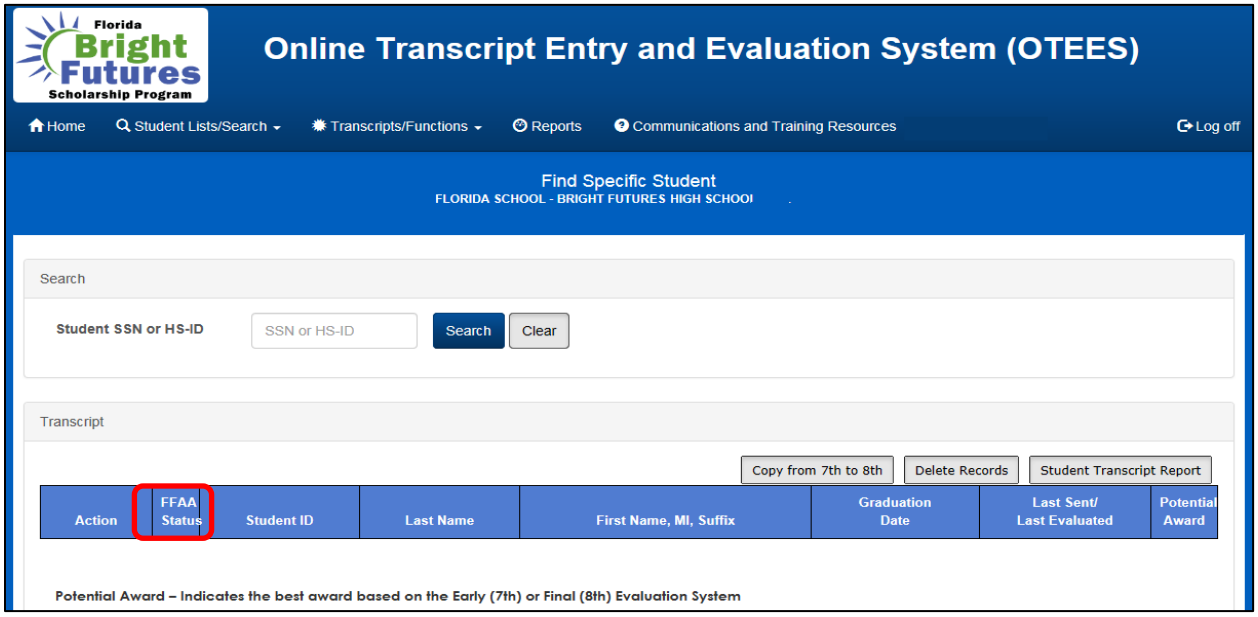
Action Code Descriptions – Display of these codes will vary depending upon security access level.

	P (Profile) – Student Demographics and Student Education Status Counselors may update or correct student demographic information until this information is matched to a student's FFAA. Afterwards, only the student may update demographics on the FFAA. On this screen, service hours can be edited (in either early or final evaluation) and the high school graduation date and diploma type can be edited in final evaluation.
	C (Course Summary) – Student Credit Summary On this screen, private schools will manually update course data.

	R (Report) – Florida's Bright Futures Scholarship System Student Evaluation Provides the Student Evaluation Report.

b. Column Headers: FFAA Status

The **FFAA Status** column header provides a link to the code descriptions. The FFAA Status Code Description will open in a separate window.



FFAA Status Code Descriptions

The FFAA Status column indicates the results of the student's preliminary evaluation. Each student's record will reflect one of the following codes:

B — The student has an FFAA and has requested an official Bright Futures (BF) eligibility evaluation. A transcript must be sent to the BF evaluation system for an evaluation to take place.

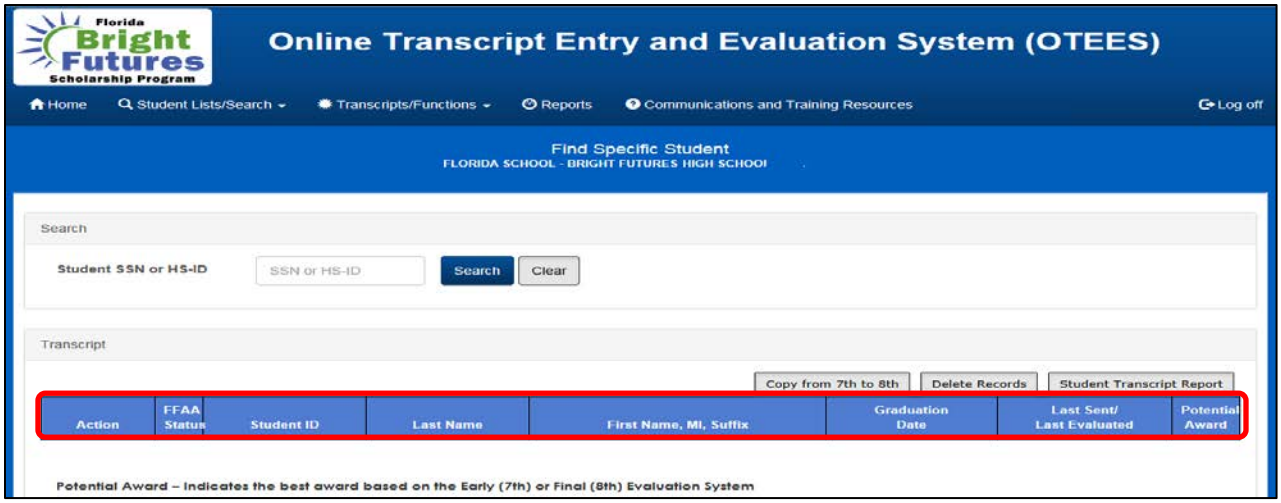
A — The student has an FFAA on file; however, the State Student Financial Aid Database (SSFAD) did not estimate the student eligible for BF. It is possible for a student to be eligible for BF with this status. BF encourages you to send the student's transcript to the BF evaluation system for an official evaluation.

N — The student does not have an FFAA on file or has an FFAA on file with information in one of the matching fields differing from the district or school and therefore is not interfacing with the High School Transcript Database. From the Student Lists/Search tab select All Applicants to see the information on your student applications to reconcile with their transcripts. A transcript with "N" status will not receive a Final evaluation if submitted to the Bright Futures system.

52 — The student answered 'Yes' to the felony question **or** has requested that her/his transcript not be evaluated for Bright Futures. The student is ineligible to participate.

Private high schools using the "On-line Transcript Entry and Evaluation System" data entry screen to enter a new student will provide the student's SSN (or unique local student ID if SSN is not available), first name, last name, date of birth, gender, and ethnicity. The Bright Futures system will search the SSFAD system for the student's FFAA. If an FFAA is found, the student's demographic information will pre-fill on the screen. If an FFAA is not found for the student, you may enter the student's demographic information. When the student completes an FFAA, the FFAA demographic information will automatically update the Bright Futures system demographic information.

c. Column Headers: Student ID, Last Name, First Name, MI, Suffix, Graduation Date, Last Sent/Last Received and Potential Award



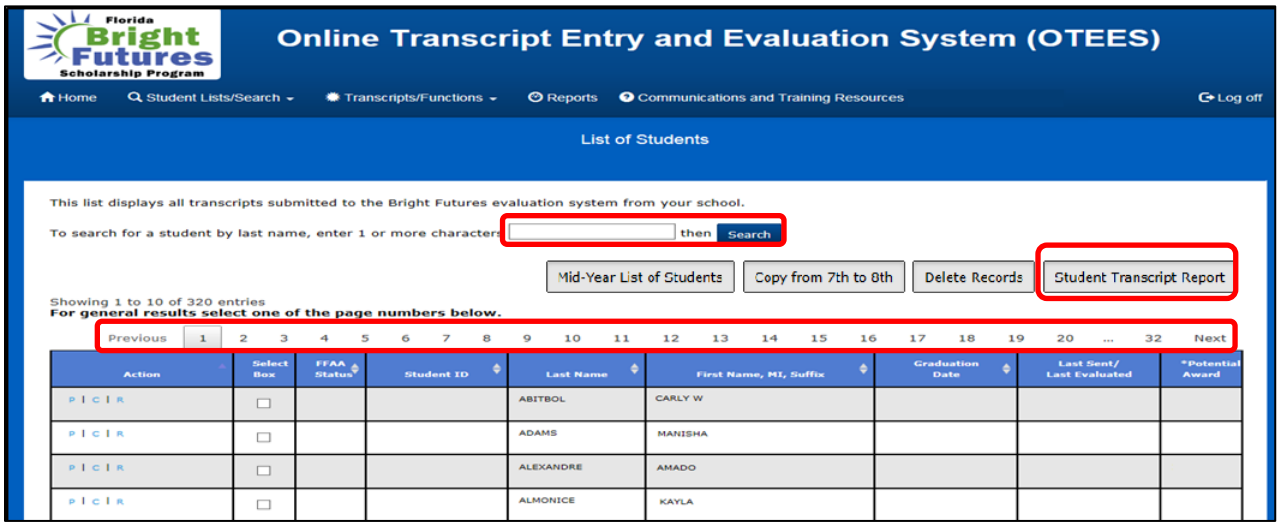
- **Student ID:** Student ID may be the student Social Security Number or High School Identification Number.
- **Last Name, First Name, MI, Suffix:** This information is provided by the high school on a student transcript.

- **Graduation Date:** Graduation date is provided in Final Evaluation only.
- **Last Sent/Last Evaluated:** The column provides the date when the transcript was entered into the system and the date when the transcript was last evaluated in OTEES.
- **Potential Award:** The potential award provides information on the status of initial eligibility after the evaluation.

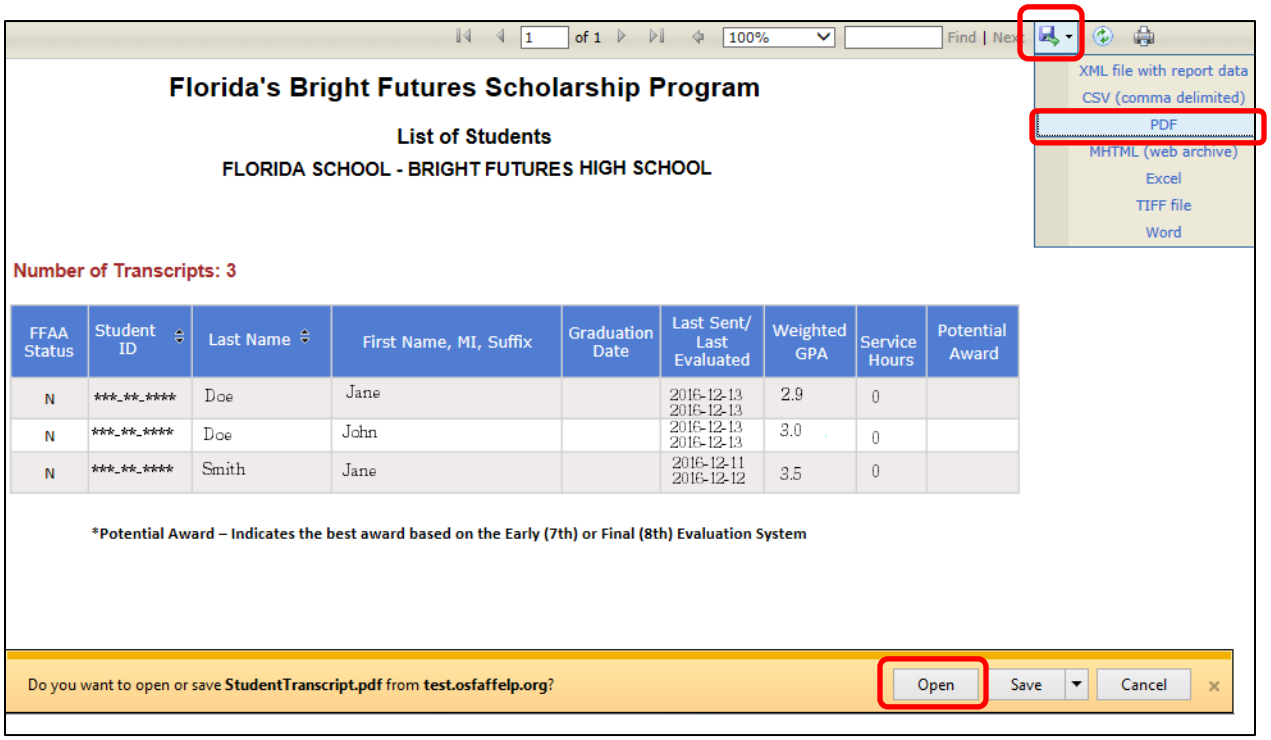
2. All Transcripts

To view all student transcripts already entered, choose **All Transcripts**. The **List of Students** displays all transcripts entered to the Bright Futures evaluation system from the school identified in the **Processing Options** school field.

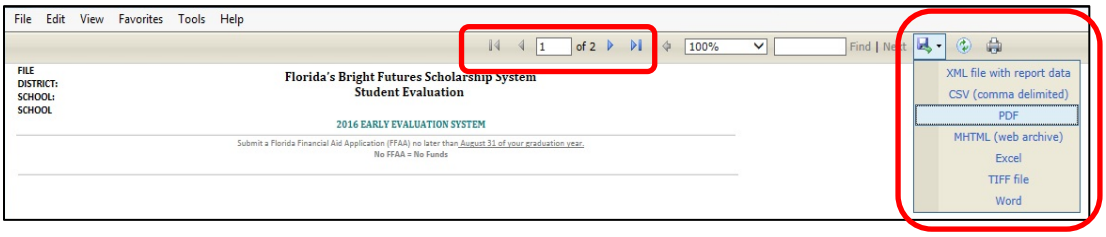
The **List of Students** displays 10 student records per page. To navigate the list, select **Previous, Next** or the numbers at the top of the list of each page. Use the search box to find individual students by entering the entire last name or a partial spelling of the last name. Column headers are defined on pages 16 through 19. Select the arrows on the column headers to sort the **List of Students** by field.



To print or save the list of students, select the **Student Transcript Report** button. The list of students will open in a new window. Select the save icon and choose PDF from the drop down menu. A message box will appear at the bottom of the screen, select open. Once the PDF version of the list is displayed, print as normal.



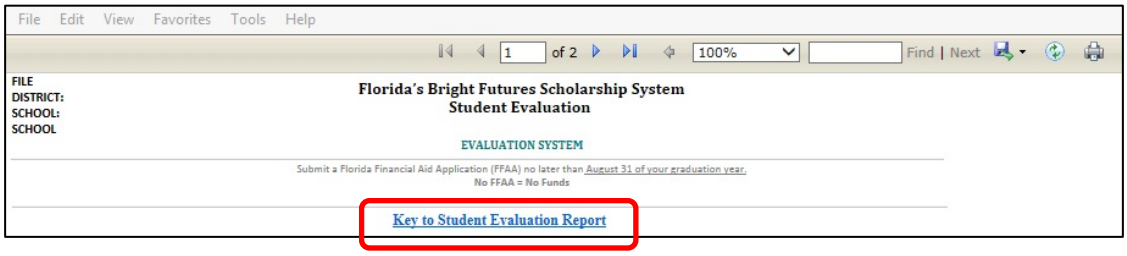
The List of Students screen provides access to the Student Evaluation Report. In the Action column, select action code R. The student evaluation is a report that opens in a new window. To navigate the pages, use the arrows at the top or type in the page number.



To print or save, select the floppy disk icon to and select PDF from the drop down menu.

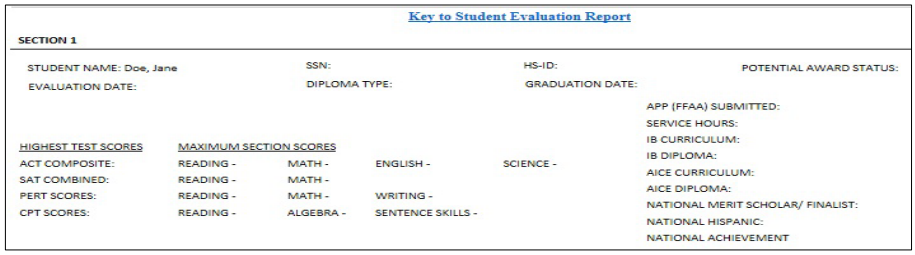
A pop-up provides the option to open, save, or cancel request.

Select **Key to Student Evaluation Report** for a detailed description of the report.

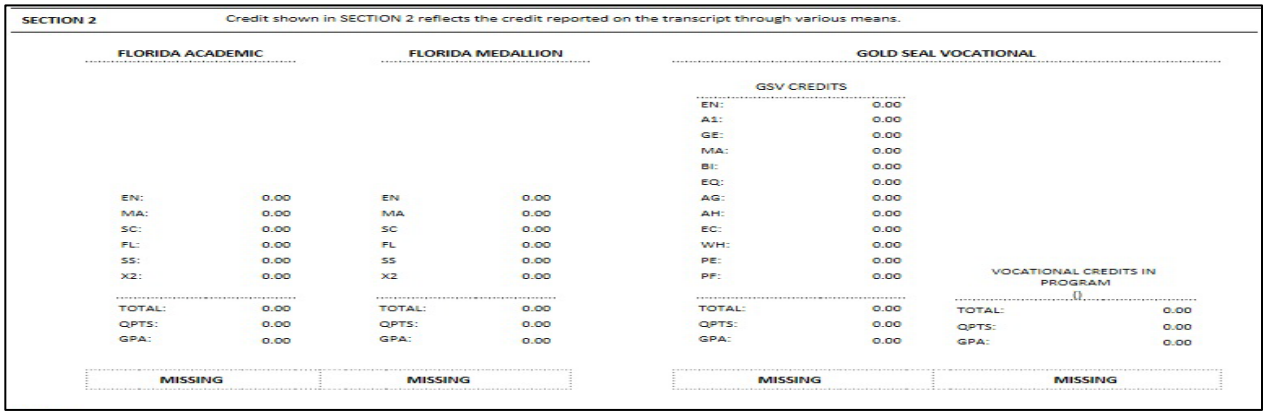


The evaluation report has three (3) sections, Section 1 and 2 are on the first page of the report and Section 3 is on the second page.

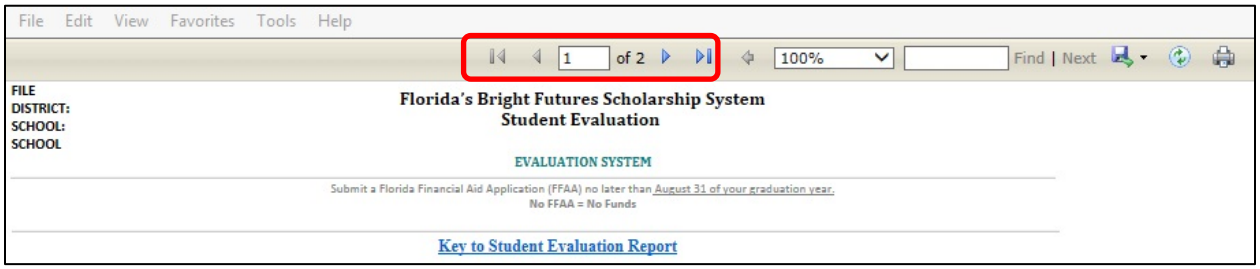
Section 1 displays: demographics, potential award status, APP (FFAA) status, highest test scores, service hours and special academic programs completed.



Section 2 provides a summary of the student's progress toward Bright Futures awards. A summary of course credits as well as GPA and quality points (QPTS) is provided under the each award. Missing criteria for each award is shown at the bottom of section 2.

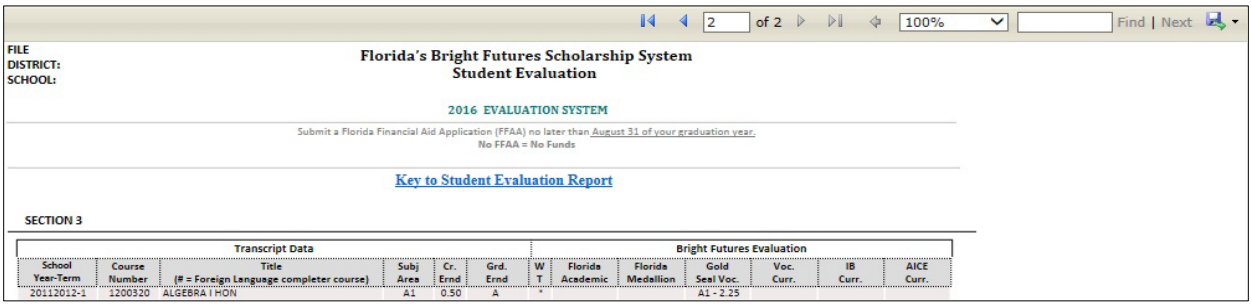


Use the arrow at the top of the Student Evaluation report to navigate to Section 3 on page 2.

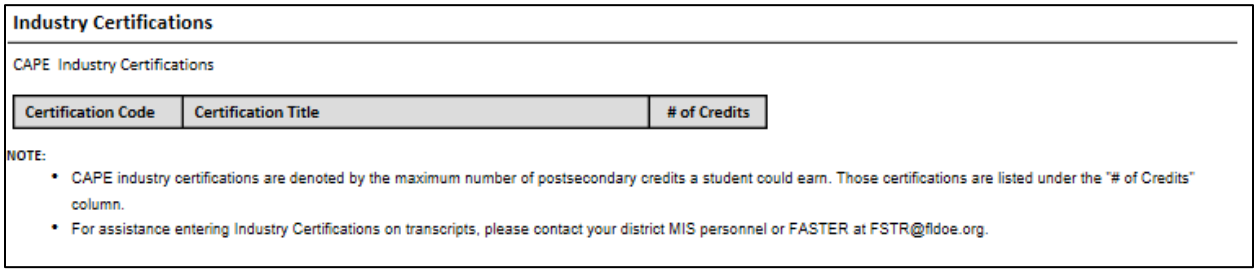


Section 3:

- Provides a list of the courses with grades and credits applied toward each award.



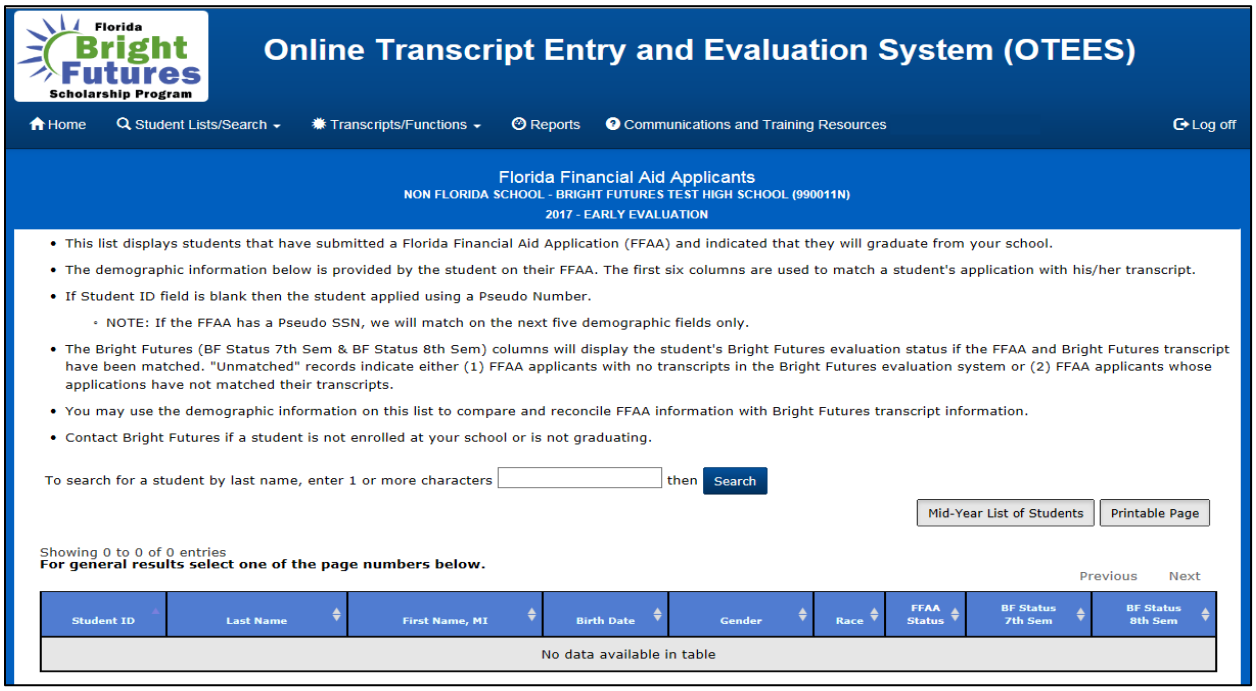
- Includes information regarding CAPE Industry Certifications**.**



3. All Applications

Under **Student Lists/Search**, select **All Applications**

All Applications displays **Florida Financial Aid Applicants**. This list displays students that have submitted an FFAA and indicated your school as their graduating school.



Columns provide the demographic information that students provided on the FFAA. Use this list to reconcile demographic information on the FFAA with the information on the transcript.

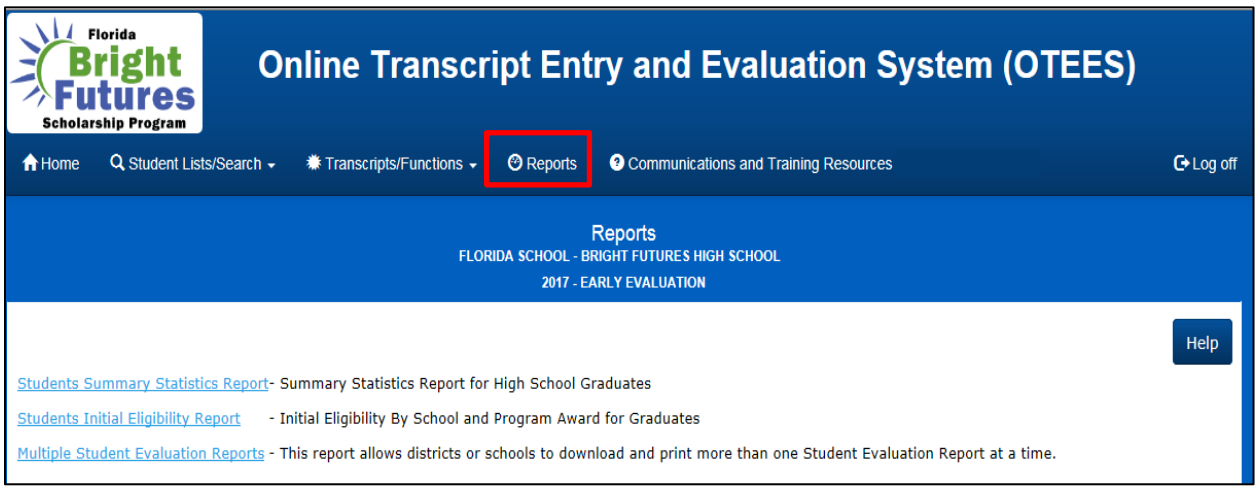
Navigation of the Florida Financial Aid Applicants List is similar to the navigation of the List of Students.

G. Reports

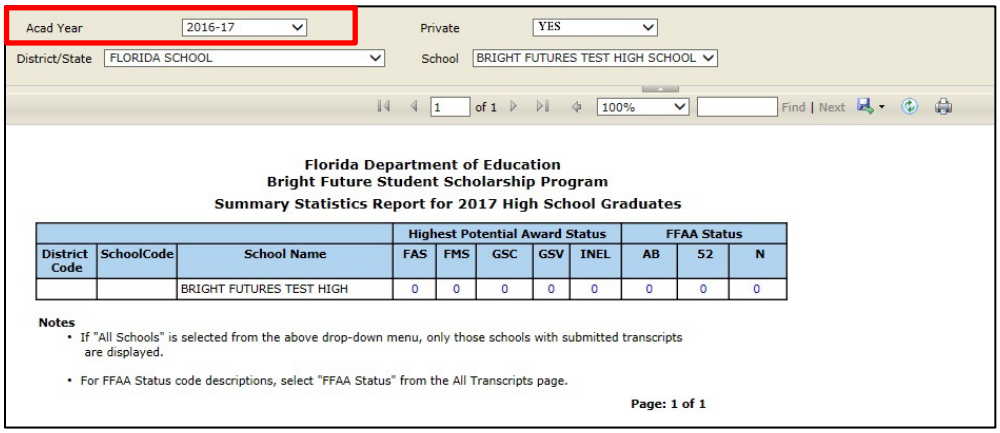
Reports provide access to three report options:

- **Students Summary Statistics Report** – displaying the current total number of students:
  - Highest potential Bright Futures Scholarship award status (including ineligible); and
  - FFAA Status code, by academic year for transcripts submitted.
- **Student Initial Eligibility Report** – displaying the total number of graduates initially eligible for each Bright Futures Scholarship award by academic year.
- **Multiple Student Evaluation Reports** – allows authorized users to request all student evaluation reports by Evaluation Year and will then generate the requested report overnight.

To access **Reports**, select **Reports** from the menu bar and then the **Reports** screen will be displayed. The name of each report is a link to that specific report, which will open in a separate window. After selecting a specific report, your school's information will be automatically displayed for the current academic year.



1. Students Summary Statistics Report

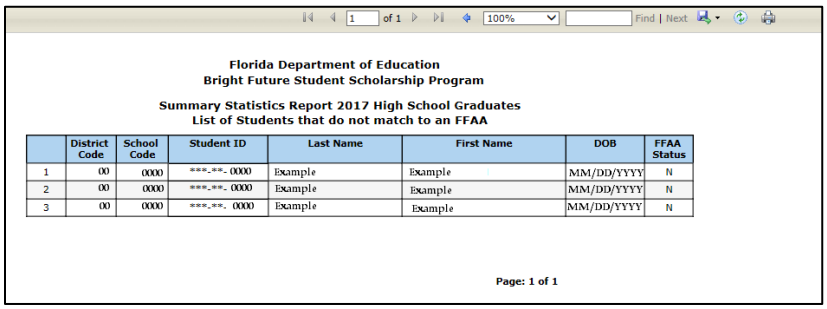


For all reports, the top part of the screen allows users to select the academic year from the drop down box of the **Acad Year** field. The following fields are fixed and will be automatically prefilled based on user login credentials: **Private**, **District/State**, and **School**.

Column Header	Description
District Code	Numerical value used to identify school district
School Code	Numerical value used to identify school
School Name	Prefilled school name
Highest Potential Award Status	Number of students who received specific award

• FAS	Florida Academic Scholars
• FMS	Florida Medallion Scholars
• GSC	Gold Seal CAPE (Career and Professional Education) Scholars
• GSV	Gold Seal Vocational Scholars
• INEL	Ineligible for a Bright Futures Scholarship Program Award
FFAA Status	Indicates the results of the student's preliminary evaluation for the Florida Financial Aid Application by way of one of the following codes: AB, 52, or N.
• AB	(AB) Student has an FFAA on file: • (A) Student may or may not be eligible for Bright Futures; or • (B) Bright Futures eligibility evaluation requested.
• 52	Student answered 'Yes' to the felony question or has requested that her/his transcript not be evaluated for Bright Futures. The student is ineligible to participate.
• N	Student does not have an FFAA on file or has an FFAA on file with information in one of the matching fields differing from the district or school and therefore is not interfacing with the High School Transcript Database.

The numerical values in the report's table provide a link to a list of specific students corresponding to that particular number. All lists have the same layout (as seen in the picture below): District Code, School Code, Student ID, Last Name, First Name, DOB, and FFAA Status.



1 of 1 100% Find | Next

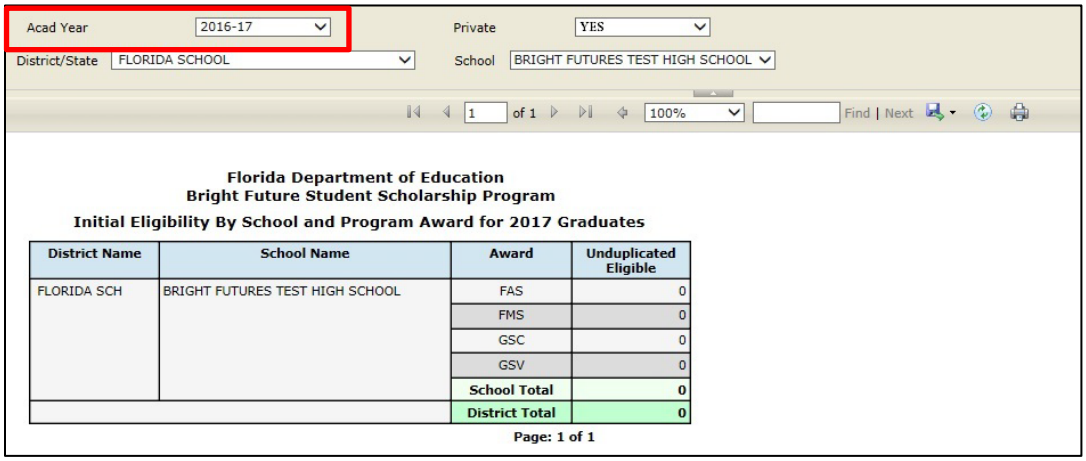
Florida Department of Education
Bright Future Student Scholarship Program

Summary Statistics Report 2017 High School Graduates
List of Students that do not match to an FFAA

	District Code	School Code	Student ID	Last Name	First Name	DOB	FFAA Status
1	00	0000	***-**- 0000	Example	Example	MM/DD/YYYY	N
2	00	0000	***-**- 0000	Example	Example	MM/DD/YYYY	N
3	00	0000	***-**- 0000	Example	Example	MM/DD/YYYY	N

Page: 1 of 1

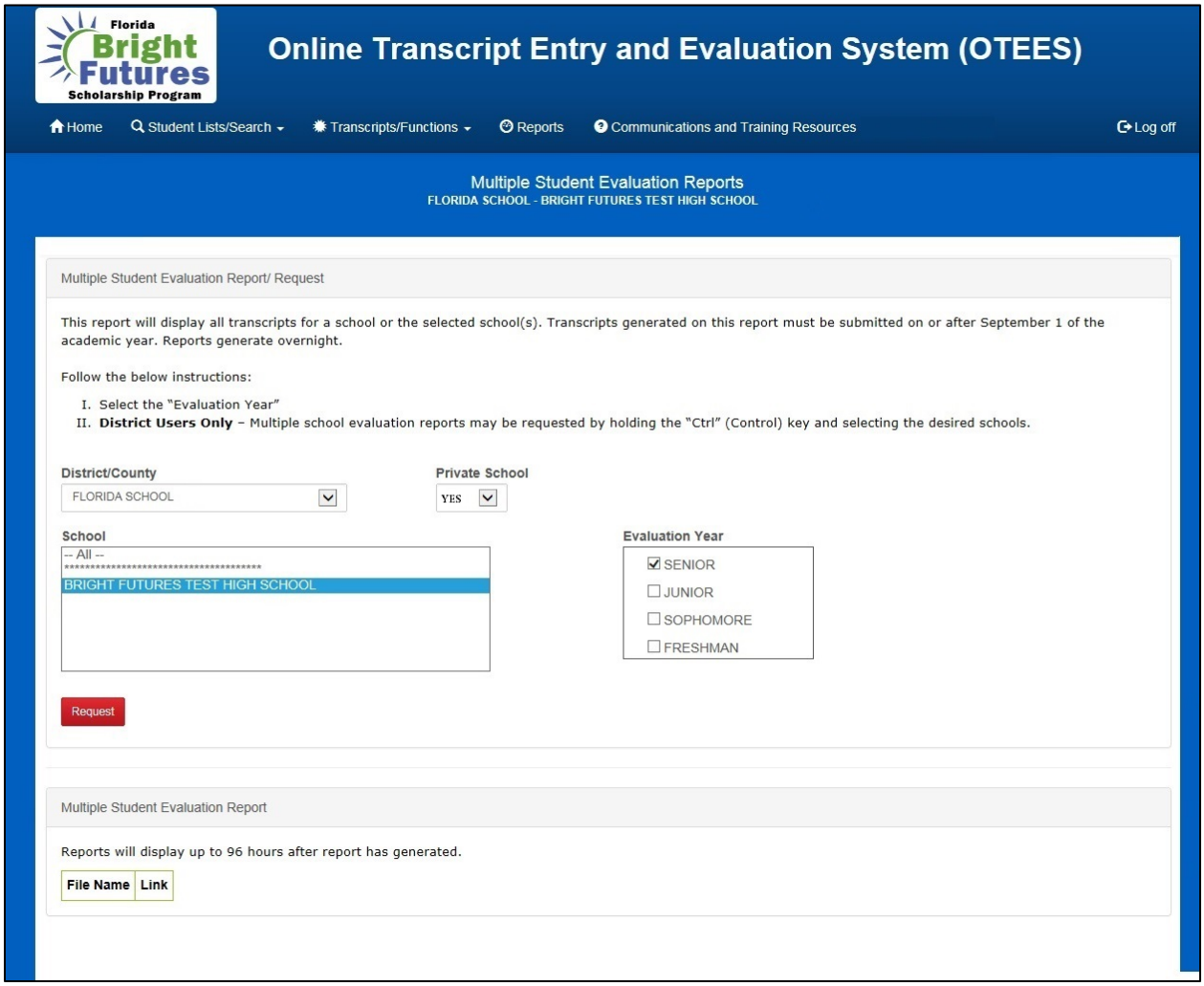
2. Student Initial Eligibility Report



All fields in the report's table are view only.

District Name	Prefilled district name
School Name	Prefilled school name
Award	Bright Futures Scholarship Award Status
• FAS	Florida Academic Scholars
• FMS	Florida Medallion Scholars
• GSC	Gold Seal CAPE (Career and Professional Education) Scholars
• GSV	Gold Seal Vocational
Unduplicated Eligible	Actual number of eligible students
School Total	Total initially eligible students per school
District Total	Total initially eligible students per district

3. Multiple Student Evaluation Reports

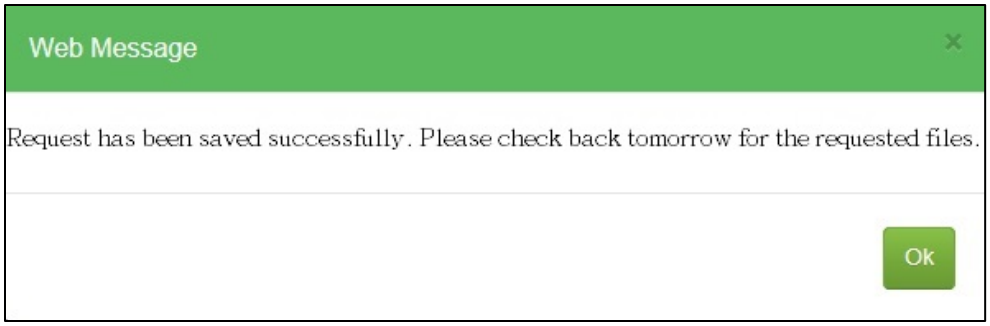


The Multiple Student Evaluation Reports screen allows the authorized user to request all student evaluation reports per evaluation year for students with transcripts submitted. The report will generate the student evaluation reports the following day.

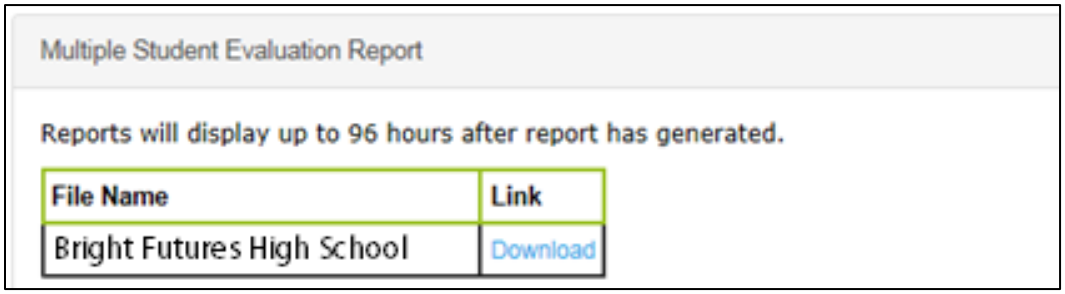
The following fields are fixed and prefilled based on user login credentials: **Private**, **District/State**, and **School**.

Select the Evaluation Years for which you would like to be included on the report and then select Request.

Select Ok, when the following web message appears, "Request has been saved successfully. Please check tomorrow for the requested files."



When available, the requested files will populate at the bottom of the **Multiple Student Evaluation Report** screen.



H. OSFA Contact Information

For assistance, please call OSFA 888-827-2004 and request to speak with a Bright Futures program specialist.