Charter School Portal
User Guide:

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Innovation and Technology

Florida Department of Education

Contents

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.
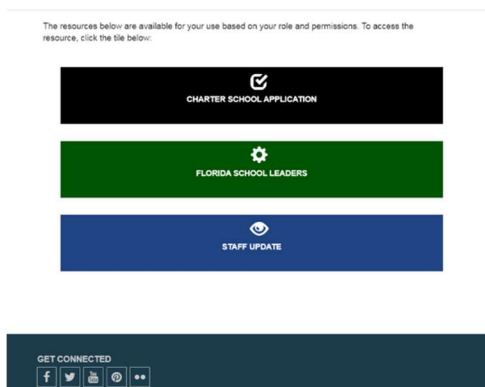
Accessing the Charter School Portal

In order to login to the Charter School Portal, you must be granted access. To do so, please contact your District Single Sign-On (SSO) point of contact to be added to SSO for the Charter School Portal. You will then contact the Charter School Office for access. Send requests to charterschools@fldoe.org, to include name, position title, district, school name, school number, email address, phone number. User permission provides the 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.
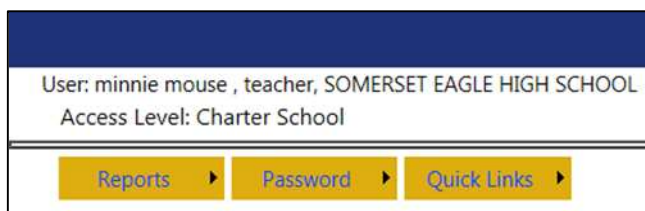
Steps to Log in as a First-Time User

1. Open: Internet Explorer (IE).
2. Login: type in address bar http://www.fldoe.org/sso.
3. Enter: Username and Password. Main Menu displays.

4. Select: Charter School Portal tile.

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 Portal Capital Outlay Plan Summary Report	Charter School: Add, edit, and submit report data for assigned school.
		District Admin: · 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.
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.
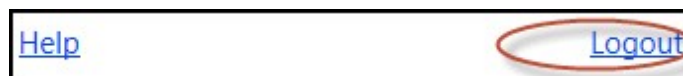
Section 2: Reports Module

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:

[Save 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

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.
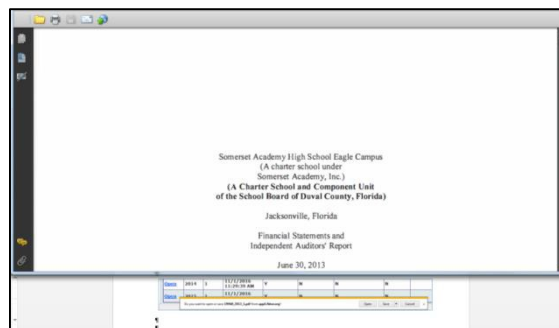
Capital Outlay Report

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.

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

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