



**CTEIS
Responsibilities
of the
Level 5
Fiscal Agency
Authorized
Official**

Fall 2020

WELCOME TO



COURSE INFORMATION

The objective of PTD Technology computer software training is to produce capable, self-confident, and proficient software users. We emphasize education concepts based on ‘real world’ scenarios. Using the new CTEIS 2021 Web application, our goal is to provide you with the very best in ‘hands-on’ instruction and materials to assist you and your organization in achieving your reporting goals.

To further enrich your training experience, PTD Technology provides valuable reference manuals. We trust you will find our educational methods and proven training experience synergistic with your goals. Help Desk Support is also available to clients requiring additional assistance at no charge to the districts.

As a pioneer in instructor-led computer training since 1978, we continue in our mission to deliver the most effective and professional computer training to you. We encourage your comments or suggestions as to how we might better serve you.

For more information about PTD Technology, call us at (517) 333-9363 Ext. 128, or visit our website at www.PTDtechnology.com.

WELCOME TO



SUPPORT

PTD Technology provides technical support to districts operating Career and Technical Education (CTE) programs.

The PTD Help Desk is staffed by experienced PTD training specialists, consultants, and dedicated support staff. Due to rapidly changing software versions and new releases, we may require additional time consulting with other professional staff.

When using this service, please be sure to provide your contact information including your name, school district, phone number, and/or email address. For CTEIS reporting, please also provide the name of the report you are preparing.

TECHNICAL HELP:

cteis.help@PTDtechnology.com

(800) 203-0614 or (517) 333-9363

Extension 128

REPORTING POLICY HELP:

Joan Church

ChurchJ@michigan.gov

(517) 335-0360

Yincheng Ye (Follow-Up)

YeY@michigan.gov

(517) 241-7652

OCTE WEBSITE:

www.michigan.gov/octe

Table of Contents

INTRODUCTION	5
FISCAL AGENCY LEVEL 5 AUTHORIZED OFFICIALS AND CTEIS	5
TIMELINE OF EVENTS.....	7
FALL TASKS - SEPTEMBER.....	8
MANAGING USERS IN CTEIS	8
EDITING AND ADDING CTEIS USERS	10
COORDINATING EXPENDITURE, FOLLOW-UP, AND ENROLLMENT DATA ENTRY	11
FALL TASKS - OCTOBER.....	13
CLASS AND STAFF ENROLLMENT DATA DEADLINE	13
FALL TASKS - NOVEMBER.....	13
EXPENDITURES DATA REVIEW AND SUBMISSION	13
WINTER TASKS - JANUARY	14
FOLLOW-UP DATA REVIEW AND SUBMISSION	14
SPRING TASKS - APRIL.....	15
UIC/MSDS DATA REVIEW	15
SPRING TASKS - MAY.....	16
STUDENT ENROLLMENT DATA DEADLINE	16
SPRING TASKS - JUNE.....	18
ENROLLMENT DATA REVIEW AND SUBMISSION	18
USING REPORTS TO VERIFY DATA.....	20
GENERATING CTEIS REPORTS	20
FURTHER ASSISTANCE	24

INTRODUCTION

Fiscal Agency Level 5 Authorized Officials and CTEIS



The Office of Career and Technical Education (OCTE) approves two Fiscal Agency Level 5 Authorized Officials (FAs) from each Fiscal Agency district in Michigan. FAs are integral to the CTE report submission process, which is completed using the online CTEIS application, and they perform many unique tasks throughout the year. These responsibilities include overseeing all reporting activities for the Operating Agencies and Operating Buildings within the Fiscal Agency district, granting reporting roles and system permissions to CTEIS users, reviewing CTE program data, and submitting CTE reports to the correct CEPD Administrator.

Authorizing User Accounts Within CTEIS

FAs have the unique ability to delegate reporting roles and responsibilities to the CTE personnel within their purview, and they grant access to the student data and other functions contained within the CTEIS system to all users. This includes CEPD Administrators as well as all building-level reporters.

For more information, please see [Managing Users in CTEIS](#) on page 8.

Reviewing and Submitting CTE Reports

FISCAL AGENT
FISCAL AGENT MONITORING
o Enrollment Collection Submission
o Expenditure Fiscal Agency Review
o Expenditures Review by Building
o District Follow Up Review
o View Programs
MANAGE USERS
o Manage Users

FAs are responsible for the submission of accurate and timely CTE data. Throughout the school year, FAs can expect to review the enrollment, expenditure, and follow-up data compiled by building reporters. When the accuracy of this information has been verified, the FA must then submit the associated reports to the assigned CEPD Administrator.

TIMELINE OF EVENTS	
September	<ul style="list-style-type: none"> • Manage new users. • Begin coordinating Expenditure personnel. • Begin coordinating Follow-Up personnel. • Begin coordinating Enrollment personnel and assisting with proper instructional design of classes.
October	<ul style="list-style-type: none"> • Class and staff enrollment data deadline (October 31, 2020).
November	<ul style="list-style-type: none"> • Expenditures report submission (Nov. 5, 2020 – Nov. 12, 2020). • Oversee Work-Based Learning and post-secondary credential collection.
January	<ul style="list-style-type: none"> • Follow-Up report submission (Jan. 8, 2021 – Jan. 15, 2021).
April	Oversee UIC/MSDS data review and maintenance.
May	<ul style="list-style-type: none"> • Student enrollment data deadline (May 14, 2021).
June	Enrollment report submission (June 17, 2021 – June 24, 2021).

***Oversight and Coordination of Building Reporters:**

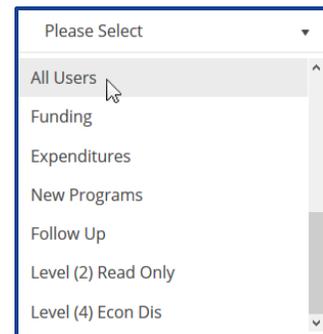
- September – November: Expenditures reporting; Enrollment instructional design.
- October – January: Follow-Up reporting.
- November – June: Enrollment reporting.

FALL TASKS - SEPTEMBER

Managing Users in CTEIS

FAs are tasked with granting local building reporters and CEPD Administrators correct access privileges within the CTEIS system. To accomplish this, often you will begin by searching CTEIS to see if an existing MEIS account links to the user. You may then edit that user's account permissions using the following steps:

1. Log into CTEIS at www.cteis.com with your MEIS user name and password.
2. From the navigation bar, click the **Admin → Manage Users → Manage Users** link to open the **Manage Users** screen.
3. If necessary, from the **Select Fiscal** drop-down list, select the Fiscal Agency district to which the building reporter or CEPD Administrator is assigned.
4. Select an option from the **Select Role** drop-down menu to display a list of CTEIS users who have an access level that matches your chosen criterion.



TIP: Select the "All Users" option to display a list of all MEIS accounts within your Fiscal Agency district.

5. Click the **Select** button within the displayed grid to open the **User Information** panel and review the user profile associated with the selected account.

User Information

<p>First Name: *</p> <input style="width: 90%;" type="text" value="John"/>	<p>Title:</p> <input style="width: 90%;" type="text" value="Fiscal Agent"/>
<p>Last Name: *</p> <input style="width: 90%;" type="text" value="Smith"/>	<p>Email: *</p> <input style="width: 90%;" type="text" value="JohnSmith@mydistrict.edu"/>
<p>MEIS Number: *</p> <input style="width: 90%;" type="text" value="A1234567"/>	<p>Phone Number:</p> <input style="width: 90%;" type="text" value="555-123-4567"/>

Update User

6. The checkboxes beneath the **Modules** header of the second review panel each represent a set of reporting tasks that you may assign to a user. By marking these boxes and clicking the **Update Modules** button, you can delegate these roles to the account in view. The account’s controller may then login to access the unique data features associated with the assigned roles.

<p>Level</p> <p><input type="radio"/> Level (1) Reports Only</p> <p><input type="radio"/> Level (2) Read Only</p> <p><input type="radio"/> Level (3) Data Entry</p> <p><input checked="" type="radio"/> Level (4) Data Entry/Economically Disadvantaged</p> <p>(Level (5) Go To Fiscal Agent)</p>	<p>Modules</p> <p><input checked="" type="checkbox"/> Enrollment/Funding</p> <p><input checked="" type="checkbox"/> Expenditures</p> <p><input checked="" type="checkbox"/> Follow-Up</p> <p><input checked="" type="checkbox"/> Programs</p>
---	--

Update Modules

TIP: New FA accounts must be authorized by OCTE. If a new FA needs access to the CTEIS system, please contact Joan Church at OCTE.

Editing and Adding CTEIS Users

From the User Information panels, FAs have a great deal of control over how individual user accounts are maintained within the CTEIS system. You can adjust the following when using these panels:

1. User account details.
2. Student data access levels and CTEIS reporting roles.
3. Access to individual building data.

At times, you may need to record the details of a new MEIS account in CTEIS to authenticate your district personnel correctly. This is accomplished on the main Manage Users screen by adding information to the fields within the **User Information** panel below the grid, then clicking the **Create User** button. For in-depth details on reviewing, editing, and adding user accounts to CTEIS, please refer to the [Manage Users Guide](#) available at support.cteis.com.

User Information

First Name: *	<input type="text"/>	Title:	<input type="text"/>
Last Name: *	<input type="text"/>	Email: *	<input type="text" value="email@email.com"/>
MEIS Number: *	<input type="text" value="A0000000"/> <small>Please fill out this field.</small>	Phone Number:	<input type="text"/>
<input type="button" value="Create User"/>			

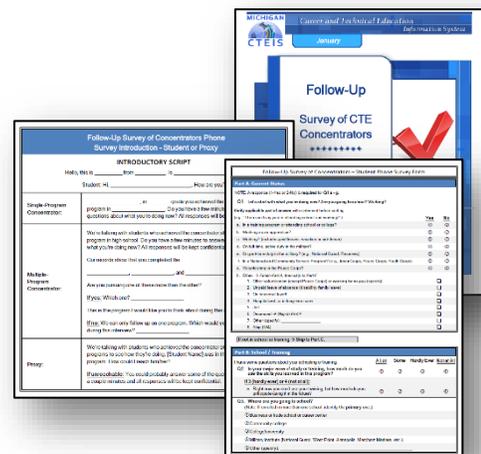
Coordinating Expenditure, Follow-Up, and Enrollment Data Entry

Beginning in September, OCTE provides free webinar training designed to educate building reporters and district administrators on CTE data collection processes and to familiarize them with the CTEIS application. The fall training focuses on preparing for the **Expenditures** report that is due in November and the **Follow-Up** report that is due in January. This training also emphasizes collecting data for the **Enrollment** report, which districts must complete at the close of each school year.

During this time, it is important that FAs:

- Ensure that all Expenditures data is reported fully and submitted on time.
- Assist Enrollment reporters with the proper instructional design of their courses, as course and staff information must be input into CTEIS by October 31, 2020. An Instructional Design report is accessible from the CTEIS navigation bar by clicking **Reports** → **Building Reports** and can help districts plan segment delivery across programs spanning multiple years.

The Follow-Up Survey of Concentrators begins in October with the distribution of survey materials to CEPD Administrators across Michigan. These materials should be disseminated to other district personnel by the end of September but are also available for download on the CTEIS Knowledge Base at support.cteis.com. Follow-Up training topics primarily center on how to conduct unbiased surveys and save concentrator responses in CTEIS. FAs are strongly encouraged to make their district building reporters aware of upcoming training events and should be



prepared to answer questions and otherwise facilitate the data-gathering and submission processes.

FAs are also advised to create milestones or schedules for their reporters to adhere to so that district data is entered steadily throughout the year rather than massively at the end of the school year. Furthermore, they should strive to make district building reporters aware of upcoming training events, prepare to answer questions, and otherwise facilitate data gathering and submission. To view the various trainings offered throughout the year, click the [Registration & General Info](#) link located within the Training section of the CTEIS Knowledge Base at support.cteis.com.

FALL TASKS - OCTOBER

Class and Staff Enrollment Data Deadline

To facilitate the processing of enrollment data throughout the school year, course and staff records must be prepared by the end of October. **All CTE courses and linked staff members must be entered into CTEIS by October 31st, 2020.** FAs should be prepared to assist with questions regarding the fall data entry process at this time.

FALL TASKS - NOVEMBER

Expenditures Data Review and Submission

Building reporters should submit final expenditures data for FA approval during the first week of November. The final Expenditures report must be submitted to OCTE no later than November 12th, 2020. Please note that OCTE uses this report to calculate total program costs and funding formulae from year to year; therefore, **it is critical that districts report all Expenditure data**, not just the minimum required to satisfy the Local Contribution and Program Improvement criteria.

The Expenditures module recently underwent significant updates. Reporters now utilize Function and Object codes instead of Line Items when reporting expenditures. This methodology, as well as other new features, are described in the updated documentation published on the CTEIS Knowledge Base. For additional details on submitting your Expenditures report, please view the [Expenditures Review Guide for FA](#), available for download at support.cteis.com.

WINTER TASKS - JANUARY

Follow-Up Data Review and Submission

Building reporters should submit final Follow-Up data for FA approval during early January. The final Follow-Up report must be submitted to OCTE no later than January 15th, 2021. Remember, students may only be surveyed by one district; if you believe concentrators are missing from your Follow-Up data, the following building report, accessed by clicking **Reports** → **Building Reports**, may assist you with identifying students who are being reported in other districts:

- Concentrators in Another District – *Lists students followed up by another district and indicates possible locations where concentrators missing from a follow-up list may be found.*

The Follow-Up module recently underwent significant updates, and new features are described in the updated documentation published on the CTEIS Knowledge Base. For additional details on submitting your Follow-Up report, please view the [Follow-Up Review Guide for FA](#) available at support.cteis.com.

SPRING TASKS - APRIL

UIC/MSDS Data Review

As spring approaches, FAs should take an active interest in the student enrollment data that building reporters have compiled in CTEIS. Valid and accurate student UICs must be attached to student data entries by mid-May, shortly before the submission of the spring Enrollment report.

To assist with data reviews throughout the year, FAs may take advantage of the powerful report-building features of CTEIS and should also encourage building reporters to do the same before submitting data for review. These reports are accessible from the CTEIS navigation panel by clicking **Reports** → **Building Reports**. When reviewing MSDS issues, the following reports may help identify problematic student UICs:

- Bad UIC by Building Report – *Provides a list of invalid student UICs.*
- UIC With No Current MSDS – *Provides a list of students with expired UICs.*

For more information, please see **Using Reports to Verify Data** on page 20.

SPRING TASKS - MAY

Student Enrollment Data Deadline

Enrollment information consists of many varying types of data, but student enrollment records are especially important. **All CTE students must be enrolled in at least one course section in CTEIS by May 14th, 2021.** After this date, MSDS data matches occur infrequently, and OCTE cannot guarantee that further UIC errors will be resolved in time for your students



to be counted for funding on your Enrollment report. FAs should strive to make district building reporters aware of this due date and to distinguish it from the end-of-year submission deadline.

Building reporters and FAs must also ensure that all student UICs are accurate and valid at this time. The following building reports, accessed by clicking **Reports → Building Reports**, may assist you with updating and verifying the information that is critical

to producing completers within your programs:

Reports for Reviewing Student Data Quality

- Bad UIC by Building Report – *Provides a list of invalid student UICs.*
- UIC with No Current MSDS – *Provides a list of students with expired UICs.*
- Class Student List – *Shows students by class within home facilities.*
- Missing Grades – *Provides a list of students with missing grades.*
- Segment Q Class List – *Shows class listings of students with a Segment Q.*

Reports for Verifying Completers

- Completer Assessment Summary – *Provides the total number of completers within your programs for the current school year.*
- Completer Assessment Report – *Lists students and segments by PSN and building.*
- Program Enrollment History – *Provides a listing of student program/course history that is useful for detecting individual completers.*

NOTE: You may wish to generate your completer verification reports in the sequence outlined above as they are listed in order of most general (Completer Assessment Summary) to most individualized (Program Enrollment History).

For more information, please see [Using Reports to Verify Data](#) on page 20.

SPRING TASKS - JUNE

Enrollment Data Review and Submission

Building reporters should perform a final review of enrollment data and submit the final information for FA approval in late June. Remember, it is extremely important to verify completers using the reports available by clicking **Reports → Building Reports** (see **Using Reports to Verify Data** on page 20).

To complete the review of the Enrollment report:

1. Log into CTEIS at www.cteis.com with your MEIS user name and password.
2. From the navigation bar, click the **Admin → Fiscal Agent Monitoring → Enrollment Collection Submission** link to open the Fiscal Report Submission screen.

VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	CEPD	Fiscal...	Fiscal Agency Name	Oper...	Operating Agency Name	Build...	Building Name	Building Status	Fiscal Status	CEPD Status	OCTE Stat...
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63020	Ferndale Public Schools	63020	Ferndale Public Schools	01222	Ferndale High School	X				
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63000	Oakland Schools	63000	Oakland Schools	00756	Oakland Schools Tech...	X	X	X	X	X
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63000	Oakland Schools	63000	Oakland Schools	00813	Oakland Schools Tech...	X	X	X	X	X
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63000	Oakland Schools	63000	Oakland Schools	00814	Oakland Schools Tech...	X	X	X	X	X
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63000	Oakland Schools	63000	Oakland Schools	00449	Oakland Opportunity ...	X	X	X	X	X
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63270	Clewsom City School District	63270	Clewsom City School District	00710	Clewsom High School					
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	56030	Coleman Community School...	56030	Coleman Community School...	00746	Coleman Junior/Senior ...					
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63000	Oakland Schools	63000	Oakland Schools	00812	Oakland Schools Tech...					
VIEW ISSUES	REPORT	REPSTD	COMP ASSESS	99	63070	Avondale School District	63070	Avondale School District	05976	Avondale High School					

3. Select the most recent school year available in the **Select Year** drop-down menu at the top of the screen. Review the Building grid, which displays the report status of each building within your Fiscal Agency district.

4. To review the data submitted by a building reporter, click the **Report** button to the left of a building's name. This will open the **4483 Program Enrollment and Completion Report**. Alternatively, you may view this report with additional student information by clicking the **Repstd** button instead. If the information requires editing, you may return a building's data to the appropriate reporter by clicking the **Send Back** button.

*TIP: Clicking the **View Issues** button in a building row allows you to view the current warnings associated with that building's enrollment data. Warnings may indicate a problem that could affect the future of your programs. If you have questions concerning warnings, contact the PTD Help Desk or OCTE.*

5. When you are satisfied that the information is complete and accurate, on the enrollment submission screen, click the button labeled **Submit** to pass that building's report to the CEPD Administrator for review.

The final Enrollment report must be submitted to OCTE no later than June 24th, 2021. For additional details on submitting your Enrollment report, please refer to the [Enrollment & Completion Collection Review Guide for FA](#) available at support.cteis.com.

USING REPORTS TO VERIFY DATA

Several report-building tools exist within CTEIS to inform users about the status of students, courses, and programs within CTE buildings and districts. Using these reports, CTEIS reporters can correct information and coordinate efforts to improve data.

Generating CTEIS Reports

A robust report-building tool is available to all CTEIS users by clicking **Reports** → **Building Reports** on the navigation panel.

Several of these reports use live CTEIS data that is periodically processed and matched to external databases, and they evolve over the course of the year as building reporters update and validate their information. Building reports are extremely valuable tools for verifying the accuracy of follow-up and enrollment data as you prepare to submit your reports for CEPD Administrator review.



The following is a list of the reports you will find useful as you approach your various tasks throughout the year:

Follow-Up

- Concentrators in Another District – *Lists students followed up by another district and indicates possible locations where concentrators missing from a follow-up list may be found.*
- XO610: Placement Report of Concentrators by Program – *Provides information about continuing education, employment, job satisfaction and average hourly wage of CTE concentrators 4-6 months after they leave their program.*

- XO611: Education by Employment Comparison – *Provides a snapshot of what happened to former high school students who (1) achieved concentration status in a career and technical education program, (2) were in 11th or 12th grade the previous spring, and (3) responded to the Follow-Up survey four to six months after achieving concentration status in their program.*
- T1608: Career & Technical Education Follow Up Report – *Shows an analysis of the responses collected for each Follow-Up survey question.*

Building Report Launcher

Select a report from the left-hand column and then indicate specific selections using the Report Criteria Panel. Select a building to generate your report.

Audit Reports		
<input type="button" value="Select"/>	Class Student List	Class list of students by building with Home Facilities and dates.
<input type="button" value="Select"/>	Bad UIC by Building	List of invalid student UIC's
<input type="button" value="Select"/>	UIC With No Current MSDS	List of students with not updated by MSDS
<input type="button" value="Select"/>	Missing Grades	List of students missing grades
<input type="button" value="Select"/>	Sending Building Counts	Listing of student counts by sending building
<input type="button" value="Select"/>	Segment Q Class List	Class listing of Students with a Segment Q

Program/Student Reports		
<input type="button" value="Select"/>	Completer Assessment Report	Listing of students and segments by PSN and building
<input type="button" value="Select"/>	Completer Assessment Summary	Completion totals for the current school year
<input type="button" value="Select"/>	EMC and Dual Enrollment Report	Class listing of students in EMC programs or Dual Enrollment Courses
<input type="button" value="Select"/>	Program Counts	listing of student counts in programs by sending building
<input type="button" value="Select"/>	Program Enrollment History	Listing of student program/course history; useful for finding completers
<input type="button" value="Select"/>	Special Population Alpha	Listing of students w Special populations by Alpha
<input type="button" value="Select"/>	Special Population Class	Listing of students w Special populations by Class List
<input type="button" value="Select"/>	Special Population Summary	Listing of summary totals of classes with students w Special populations

Program/Course Reports		
<input type="button" value="Select"/>	Instructional Design Reports	Listing of programs and subsections with segments
<input type="button" value="Select"/>	3 Yr Instructional Design Report	Listing of programs and subsections with segments for multiple years
<input type="button" value="Select"/>	Secondary Taxonomy	Listing of programs by building
<input type="button" value="Select"/>	List of Courses by Building	Listing of active courses within a building
<input type="button" value="Select"/>	Active District Staff Listing	Listing of active teachers within your district

Enrollment

- Bad UIC by Building Report – Provides a list of invalid student UICs.
- UIC with No Current MSDS – Provides a list of students with expired UICs.
- Class Student List – Shows students by class within home facilities.
- Missing Grades – Provides a list of students with missing grades.

- Program Enrollment History – *Provides a listing of student program/course history that is useful for detecting individual completers.*
- Completer Assessment Report – *Lists students and segments by PSN and building.*
- Completer Assessment Summary – *Provides the total number of completers within your programs for the current school year.*
- Segment Q Class List – *Shows class listings of students with a Segment Q.*
- 4483 Program Enrollment and Completion Report – *Contains program and course level information concerning time, enrollment, teacher, and semester/trimester (available at Admin → Fiscal Agent Monitoring → Enrollment Collection Submission).*
- 4483 Program Enrollment and Completion with Student Data Report – *Contains program and course level information concerning time, enrollment, teacher, semester/trimester, and student enrollments (available at Admin → Fiscal Agent Monitoring → Enrollment Collection Submission).*

Miscellaneous

- Sending Building Counts – *Provides a list of program and course student counts by sending facility.*
- Program Counts – *Provides a listing of program and course student counts in programs by building.*
- Special Population Summary – *Provides a summary of special population information by building.*

FURTHER ASSISTANCE

Submission of the Enrollment report in June typically marks the end of the Fiscal Agency Level 5 Authorized Official's responsibilities for the school year. Remember that assistance is always available if problems arise at any time throughout the year.

Requests for technical assistance with CTEIS may be directed to the CTEIS Help Desk at cteis.help@PTDtechnology.com, (517) 333-9363, ext. 128, or (800) 203-0614, ext. 128.

General questions regarding CTEIS and the report submission and review process may be directed to the Office of Career and Technical Education at (517) 335-0166.