Certification Instructions: MyPortal

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Webinars for Nonpublic Schools who participate in the North Carolina K12 Programs are available here. Review any of this training as needed.

In addition, please see the guidance for Tuition Discounts and Institutional Aid in the School Administrator Resources.

Cost of Attendance (School Information)

Prior to the start of each school year, complete the Cost of Attendance in your School Information region in MyPortal. Enter the Standard Cost for each grade level. The Standard Cost from the School Information page will prepopulate for each student according to the student's grade level, however it can also be edited at the student level.

Once Certification begins, schools can no longer update the Cost of Attendance in MyPortal. During Certification, schools can manually enter or edit the Standard Cost per student.

All schools are able to take advantage of the Cost of Attendance function. However, larger schools in particular will gain efficiency and reduce the potential for error by entering the Standard Cost one time and thus entering data in fewer fields per student.

How to certify a student

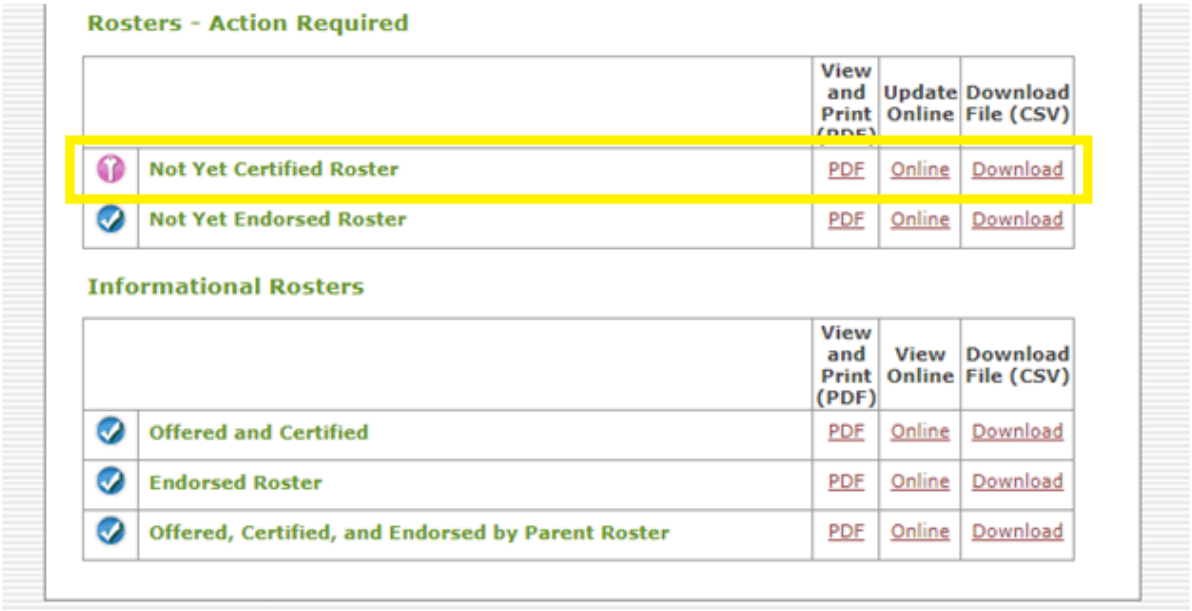
The following instructions are for both the Education Student Accounts (ESA+) and Opportunity Scholarship Programs. Follow the steps below to certify each student listed.

Certification, a school responsibility, occurs one time per school per year even if a student has more than one program award. **Endorsement** is per semester and per program. Schools endorse, and then parents endorse.

Quick Instruction Guide

1. Indicate if the student is enrolled **for the current** school year.
2. Choose the student's **Grade Level** for the current school year.
3. Review your school's **Standard Cost** (an annual cost). The Standard Cost is prepopulated from the MyPortal School Information "Cost of Attendance" if a school entered data there. If necessary, schools can override at the point of completing Certification. **All dollar amounts should be rounded to the nearest dollar. Do not use a dollar sign ($), a comma, or a decimal when entering dollar amounts.**
4. Enter the **Individual Cost** for this particular student (an annual cost).
5. Enter the student's **Fall Tuition / Fees Owed** (first semester cost).
6. Enter the student's **Spring Tuition / Fees Owed** (second semester cost).
7. If certifying online, the user has to click the Certify checkbox, and then click Save to complete Certification.
8. Repeat Step 1-7 *for each student*.

Three options in MyPortal



Rosters - Action Required

		View and Print (PDF)	Update Online	Download File (CSV)
	Not Yet Certified Roster	PDF	Online	Download
	Not Yet Endorsed Roster	PDF	Online	Download

Informational Rosters

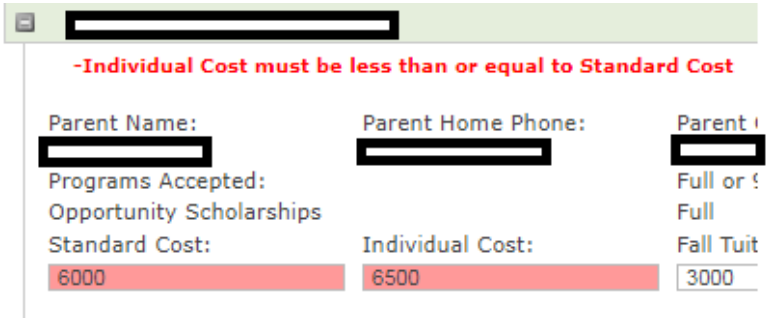
		View and Print (PDF)	View Online	Download File (CSV)
	Offered and Certified	PDF	Online	Download
	Endorsed Roster	PDF	Online	Download
	Offered, Certified, and Endorsed by Parent Roster	PDF	Online	Download

Certification in MyPortal is available via a Roster. Rosters have three options:

1. **PDF** View or Print a list of students on the Roster. No data can be entered via the PDF.
2. **Online** Enter student cost information via individual student records.
3. **Download** Download a .CSV file, enter student information, then upload the file back to certify students in a large batch. Instructions for this option are included at the end of this document. Additional training is available here; or see our website for school administrators.

Troubleshooting error messages (Online option)

An error message will display if you have certified incorrectly. For example, if the fall and spring costs entered do not add up to the (annual) individual cost for that student a message appears to explain. If an individual student costs more than a typical student at that grade level, the school official will see the message below.



*** To Certify a student as Not Attending: Enter ***No*** for student enrollment as a Certification response. Remove the Standard Cost if it has prepopulated from your school's Profile ("Cost of Attendance") and do not enter any other data. Click the Certify box, and you will certify the student as Not Attending your school. ***

Remember that if you are not able to certify all students at one time, you can certify any one or more students and leave the others on your Not Yet Certified Roster. You do not need to complete the entire list at once. However, you must complete your Not Yet Certified Roster as soon as possible. K12 staff will communicate deadlines to your school about Certification.

Definitions

Standard Cost

Standard cost is every student's required tuition and fees a nonpublic school charges per school year and grade level. This information is entered once, at the beginning of each school year, in the School Profile in MyPortal. It is also editable at the point of Certification.

Calculation

The formula for calculating a student's standard cost for the entire school year is:

[GRADE LEVEL BASE TUITION] + [REQUIRED FEES] = [STANDARD COST]

If your school has a special curriculum track that is billed at a higher rate than the base tuition, add that cost to the base tuition, along with any required fees, to arrive at the Standard Cost.

Required fees are costs such as books, technology, or curriculum, that are billed at the same rate of all students of a particular grade level. Any fees that are **optional** must not be included in the fee portion of the calculation.

If a previously-enrolled student participates in your fixed tuition rate plan, then report the current costs for that grade level according to the plan's tuition schedule.

The standard cost does not include any amount a student may receive from the Opportunity Scholarship or Education Student Accounts (ESA+) Programs.

Current School Year	Annual
Base Tuition	5300
Books	+ 600
Tech Fee	+ 500
Curriculum Fee	+ 400
Total	= 6800

Individual Cost

Individual cost is the amount the student owes for the entire school year after applying any discount and/or accounting for other financial aid (not including the K12 Program funding) the student will receive. Individual cost will be the same or lower than the standard cost.

Calculation

The formula for calculating a student's Individual cost for the school year is:
[STANDARD COST] – ([SCHOOL DISCOUNTS] -- [STUDENT AID]) = [INDIVIDUAL COST]

The individual cost should **not** be adjusted for any funds a student is expected to receive from the Opportunity Scholarship or ESA+ Programs. The K12 Programs at SEAA will make those calculations.

Current School Year	Annual
Standard Cost	6,800
School Discounts	- 500
Other Financial Aid	- 500
Total	= 5,800

Fall and Spring Semester Tuition/Fees Owed

The Semester Cost is the required amount the student owes for the spring and/or fall semester. The fall semester is the first semester, or first half of a school's academic year. The spring semester is the second semester, or second half of a school's academic year.

The fall and spring semester costs must add up to the individual cost.

Calculation

([SEMESTER GRADE LEVEL BASE TUITION] + [SEMESTER REQUIRED FEES]) -
([SEMESTER SCHOOL DISCOUNTS] + [SEMESTER STUDENT AID]) = [SEMESTER COST]

In this example the school requires the student to pay the total curriculum fee at the beginning of the school year.

Amount per semester	Fall	Spring	Individual Cost
Base Tuition	2,650	2,650	5,300
Books	+ 300	+ 300	+ 600
Curriculum Fee, once	+ 400		+ 400
Tech Fee	+ 250	+ 250	+ 500
School Discounts	- 250	- 250	- 500
Student Aid	- 250	- 250	- 500
Per Semester Cost	= 3,100	= 2,700	= 5,800

Notes

- Schools should not include any costs or fees that are not documented on the Tuition and Fee Schedule on file with SEAA.
- The Individual Cost is the cost to the family after all school discounts and aid have been applied.
- When calculating the Individual Cost, do not subtract the expected Opportunity Scholarship or ESA+ funding from the Standard Cost.
- SEAA will apply Opportunity funds first, and ESA+ funds second, to the student's Individual Cost.
- The scholarship award amounts may never exceed the student's required tuition and fees after any school discounts or student aid are applied (the Individual Cost).

File Download for Certification

To use a spreadsheet to complete Certification, choose the third option called “Download”.

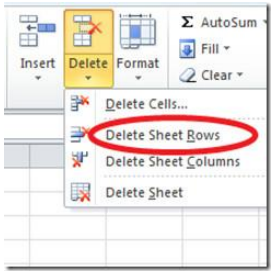
Rosters - Action Required

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Not Yet Certified Roster	PDF	Online	Download
Not Yet Endorsed Roster	PDF	Online	Download

The download option allows you to download the list of students to certify and use Excel to record the cost information. You can then upload the file to certify students in a batch.

If you are not ready to certify everyone on the list, highlight and delete the rows containing the students you do not wish to certify. You can certify a subset of your students now, and the others will remain on the Not Yet Certified Roster. You can certify them “Online” or via the “Download” at a later date.

***Delete the rows and not just the data in the cells. ***



The columns to the left of the spreadsheet you download (not shown in the screenshot below) provide student and parent name and contact information. Columns N and O identify the program from which the student receives funds.

If the student is an Opportunity Scholarship student, Column P displays the Award Tier.
If the student is an ESA+ student, Column Q notes whether or not the student is eligible for the ESA+ Higher Award Amount.

The columns in the screenshot below show where the school official should enter data; Columns R through X. If the Cost of Attendance was done prior to Certification, the school official would only need to double check the Standard Cost which would be prefilled based on the Cost of Attendance. In that case, there would be 6 columns in which to enter data, not 7 as shown here.

As a reminder, school officials can enter or edit the Standard Cost field during Certification.

Other than the columns noted below, no other fields should be edited on this spreadsheet. If you notice that a family's contact information is incorrect, for example, you cannot edit that here. (Ask the family to log in to MyPortal and update their contact information.)

R	S	T	U	V	W	X
Certify Student	K12 School Grade Level	Current Year Attending	Standard Cost	Individual Cost	Fall Tuition Fees Owed	Spring Tuition Fees Owed

Codes for Data Entry

From left to right in the screenshot in the previous section, note the column headers. Then see below for the type of data to enter.

Column R / Certify Student: Y or N

Column S / K12 School Grade level: use numeric code; 0 for Kindergarten, 1 for 1st grade, etc.

Column T / Current Year Attending: use Y for "attending full-time," P for "attending part-time," or N for "not attending."

Column U / Standard Cost: Enter a whole number for the cost; no cents. Do not include commas, dollar signs, or decimals.

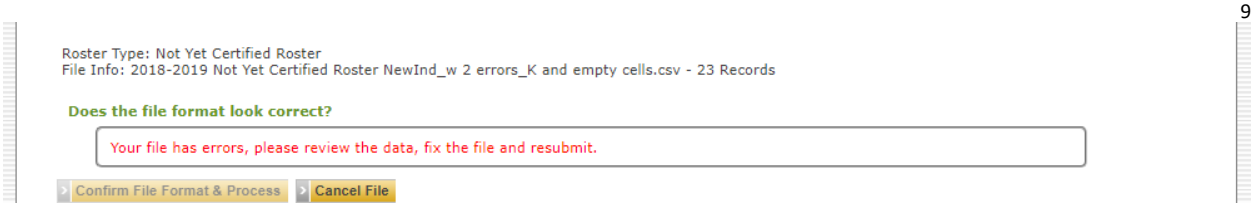
Column V / Individual Cost: Enter a whole number for the cost; no cents. Do not include commas, dollar signs, or decimals.

Column W / Fall Tuition/Fees: Enter a whole number for the cost; no cents. Do not include commas, dollar signs, or decimals.

Column X / Spring Tuition/Fees: Enter a whole number for the cost; no cents. Do not include commas, dollar signs, or decimals.

Save the file on your computer. Name it something logical to you and remember where you save it. Then return to MyPortal and choose the File Transfer region. Upload the file.

After you upload your file, if you see the message below, the most common explanations are with data entry. See the next section. Other common errors are deleting data but leaving the row or submitting the spreadsheet without data for a particular student. Your view of the spreadsheet will show you asterisks (***) where data entry has resulted in an error.



*** To Certify a student as Not Attending: Enter ***No*** for student enrollment as a Certification response. Remove the Standard Cost if it has prepopulated from your school's Profile ("Cost of Attendance") and do not enter any other data. Click the Certify box, and you will certify the student as Not Attending your school. ***

After you upload the file in the File Transfer region, you will see a message that says the results from your file upload will be available in 24 hours. It will likely not take that long. When you click on the File Transfer results, you can open the bar (click the gray square on the left of the yellow bar) to see the results.

Schools should focus on the last two links. The All Processed will confirm the students who were processed successfully. The Exceptions will show you which students did not certify. You should see an explanation in the far right of the spreadsheet for any students for whom certification did not process.

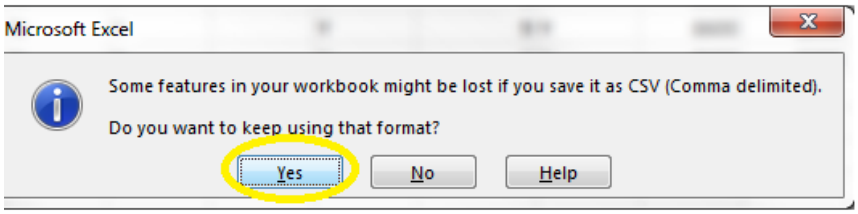


Downloads are in CSV format. CSV files are recognized by most spreadsheet programs, including Microsoft Excel ™.

Avoid Common Errors

1. Enter 0 for grade level = Kindergarten.
2. Fill in data for required fields (no empty cells for required fields).
3. Do not include empty rows.
4. Enter data for all students on the spreadsheet or delete the rows containing those students.
5. If you delete rows, delete the row and not just the data in the cells.
6. Do not add rows.
7. Do not edit the column header text.

8. Do not delete or re-order the columns. You can change the width of the columns as you work.
9. Check your math. Make sure the Individual Cost is equal to or less than the Standard Cost, and that Fall / Spring add up to Individual. You can create formulas in the spreadsheet if helpful.
10. Most importantly, **be sure to save the file in .CSV format**.



Correcting Certification Data

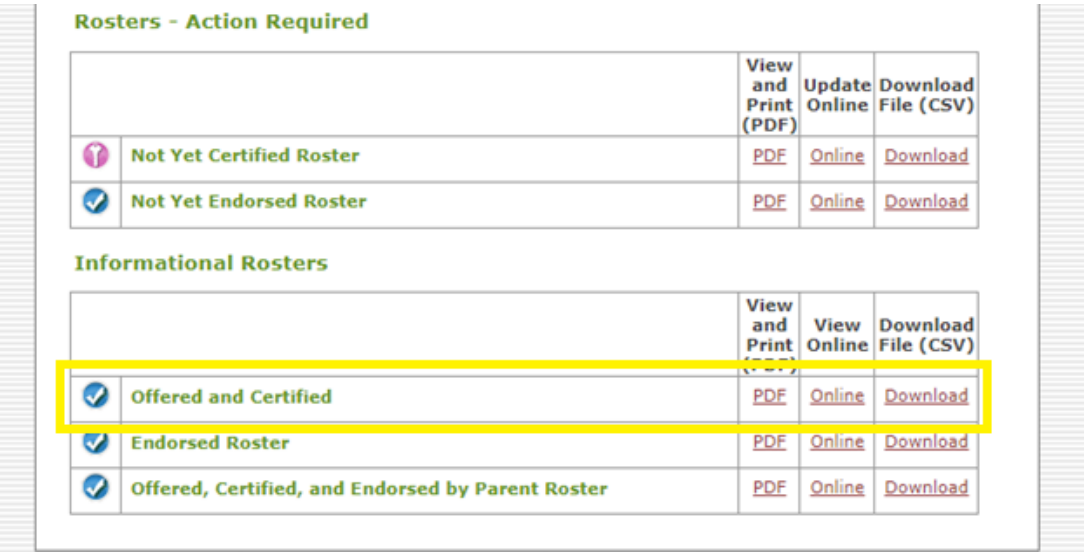
You must correct any Certification errors prior to Endorsement.

Corrections after Endorsement should be rare. Corrections after Endorsement will significantly delay Disbursement.

To make corrections after you have certified but before Endorsement, go to the Offered and Certified Roster. This Roster shows you what you entered as Certification information and allows you to make corrections if needed. See the screenshot below.

If you notice an error when you are about to Endorse your student(s), do not take any action on the Not Yet Endorsed Roster. **Stop.**

1. Go to the Offered and Certified Roster.
2. Make corrections.
3. Return to the Not Yet Endorsed Roster.
4. Endorse your students.



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Informational Rosters

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Offered and Certified	PDF	Online	Download
Endorsed Roster	PDF	Online	Download
Offered, Certified, and Endorsed by Parent Roster	PDF	Online	Download

Contact Information for School Administrators

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