New User Orientation Video Transcript

Video 1 – Introduction to CTEIS for New Users

On behalf of PTD Technology, welcome to the online CTEIS New User Orientation! Based in East Lansing, PTD Technology develops the CTEIS software and hosts many training sessions across Michigan throughout the year.

The online New User Orientation works in conjunction with the New User guide to provide you with valuable tips on how to complete your seasonal data entry using CTEIS. The presentation and instructional manuals are provided during training sessions but may also be downloaded at any time. Simply use any internet browser to visit www.cteis.com and locate the "Explore Documentation" section of the screen. The "New User Training Video" and other information to help you get started is located within the "Enrollment" collection of resources.

As a new reporter, you may be wondering "What is CTEIS and how do I use it?" CTEIS stands for the Career and Technical Education Information System. It is the online application you will use to report data from your CTE classes to the Office of Career and Technical Education, or OCTE. This information is sent to the state in a series of reports that must be filed throughout the year. As a building-level reporter, you will focus on up to three of these reports, but before we examine them in detail, we will first discuss CTEIS to gain a better knowledge of the application.

Click on the link called "Understanding CTEIS" to learn about CTEIS and the many ways it simplifies your reporting tasks.

Video 2 – Understanding CTEIS

CTEIS was developed with two main goals in mind. Primarily, the application collects enrollment data pertaining to CTE programs. The state of Michigan needs this information in order to determine how its 61a(1) funds are distributed—that is, how much money each CTE program in the state may receive for the year. Because tracking the distribution and appropriate use of state funds is so important, the data you collect and report to OCTE must be accurate and reliable. CTEIS provides a secure workspace where you may compile your data and it also offers a variety of tools to help you check the validity of your information before you submit your final reports.

CTEIS was also designed to comply with federal reporting requirements, specifically the Perkins legislation. Under this law, the federal government outlines several Core Performance Indicators, or CPIs, which gauge the efficiency of each state's education system in several key areas. The federal government requires states to annually report these CPIs as well as track the performance of students based on race, gender, ethnicity, and other special population categories. States submit this data each year via a C.A.R., or Consolidated Annual Report. You will notice that the information you input into CTEIS reflects that which is required by federal law.

CTEIS also serves the secondary functions of linking your CTE data to the information stored in the Michigan Student Data System, or MSDS, and monitoring CTE programs on a statewide level so that all classes may be analyzed and improved.

To begin working with your CTE reports, you will want to understand some of the commonly used vocabulary:

CTEIS, as we learned, stands for Career and Technical Education Information System.

Classification of Instructional Program codes, commonly referred to as CIP codes, are federal identification numbers assigned to a particular category of instructional material. CIP codes define the programs your district teaches.

The PSN, or Program Serial Number, is a unique identification number assigned to a single program that is taught within a specified building.

CSC stands for Course Section Code. This is the common name or identification number given by a district to a class taught within a specific building. In general, a CSC will match the course designation found in your student management system.

WE is an acronym for "Wage-Earning." This identifies one of two types of programs which each adhere to a certain set of reporting rules. Wage-earning programs provide students with the skills required to hold a wage-earning job. They are reported for funding purposes and student demographic information regarding these classes is also supplied to the federal government through a series of CPIs.

FCS, like "Wage-Earning," refers to a set of classes with specific reporting requirements. FCS stands for "Family and Consumer Science" and includes programs that promote wellness, but generally do not grant students skills necessary to hold a wage-earning job. These programs are funded, but demographic information is not reported to the federal government in the annual CPIs.

Your SMS is your local Student Management System. This is a database where your main student records are kept.

The MSDS is the Michigan Student Data System. Like an SMS, this data system is the statewide database that houses all student records.

As you begin to gather data to report, you will want to have a working knowledge of how your district's courses are structured. To begin, the state assigns each program a CIP Code based on that program's subject matter. For example, all Construction Trades classes are assigned CIP Codes beginning with "46." A course that falls within the Automotive Technician program is identified by the CIP Code 47.0604. When your district requests permission from the state to teach a CTE program, it must identify an operating building, a location where that course will be taught. Once the state grants your district permission to run a CTE program, that program's CIP Code is linked to the indicated operating building and is given a PSN unique to that individual class. A program with the same CIP code taught inside a different building has a different PSN so that all similar classes in Michigan are distinguishable.

Your unique program consists of classes which are given a CSC within your operating building, a serial number or phrase such as "AUTO 101" that helps define the class locally. Depending on how your district has set up the class, it may be further divided

into up to four subsections. Subsections indicate groups of students receiving different lessons simultaneously during a class meeting time. An example of this might be when a teacher instructs both first and second-year students together in different topics. To prevent the need to build duplicate classes into CTEIS to accommodate each set of students, the first year students can simply be placed into one subsection of a class and the second-year students into another.

Finally, no course is complete without indicating segment information. Each CTE program is designed to include courses that offer a total of 12 unique segments, and each subsection within a course may deliver between 1 and 11 segments. When students pass a CTE course with a grade of 2.0 or better, they receive credit for all segments delivered by the subsection in which they were enrolled. For students to officially become Completers within a program, they must receive credit for all twelve segments available.

Later, as you begin entering class information into CTEIS, remember that building-level reporters are responsible for including segment data with the class details that are added to the CTEIS database, but they should never alter or guess at proper segment delivery. Building-level reporters are not responsible for determining the instructional design of a course, and questions related to correct segmenting should be directed to the class instructor or your CEPD Administrator.

Next, click on the link called "The People of CTEIS" to learn more about the team of people who work together to complete CTE reports.

Video 3 – The People of CTEIS

When reporting CTE data to the state, you become part of a broad network of reporters working cooperatively to ensure information arrives at OCTE accurately and in a timely manner.

As a building-level reporter, your main contact is your Fiscal Agent. Fiscal Agents are appointed by OCTE and are responsible for managing reporters within their territories, called fiscal agencies. Generally, two fiscal agents comprise each Fiscal Agency, and their duties include granting new reporters access to CTEIS and defining their permissions within the application. Fiscal Agents must also review all reports submitted for each operating building within the fiscal agency. Once the review is complete, a fiscal agent submits the reports to the CEPD Administrator for a final review before the data is sent to OCTE.

The CEPD Administrator role allows a user to review and sign off on reports, submit new program requests, and access the administrative section of CTEIS. CEPD Administrators are also responsible for submitting final reports to OCTE.

The Enrollment Data Entry role grants the user access to all activities related to the funding of CTE programs, including inserting, updating, and editing classes, students, teachers, enrollments, and grades. Reporters with the Enrollment Data Entry role may also upload and export enrollment data and may access the 4483 Enrollment and Completion Collection report.

Users who have an Expenditures Data Entry role may access the Expenditures section of CTEIS. Here, the reporter may enter expenditure data for the 4033 Expenditures report, validate information, and view various custom reports to assist with the reporting process.

The Follow-Up Data Entry role gives a user permission to enter the Follow-Up area within CTEIS and to complete Follow-Up surveys.

Besides receiving permission to enter the various sections of CTEIS, building reporters may also be granted additional access levels within CTEIS. All users have the authority to review reports before submitting them to a Fiscal Agent, CEPD Administrator, or OCTE. In addition to reviewing reports, users with Level 2 access may view school, student, and

course information. Level 3 and 4 reporters may also enter and edit data within the CTEIS database, and Level 4 reporters are allowed to view economically disadvantaged students. Level 5 access is reserved for Fiscal Agents and allows the user to change the access levels and delegate role responsibilities to other reporters.

Click on the link titled "Reporting in CTEIS" to learn what reports OCTE requires each year as well as the steps you should follow to complete them.

Video 4 – Reporting in CTEIS

OCTE requires building-level reporters to submit three reports every year. Each report requires that you gather different data, enter it into CTEIS, and submit it on time so that OCTE can compile the information, analyze it, and then distribute its findings to districts across the state.

Your enrollment data forms the backbone of all reports required by the state. This information is used in all aspects of CTE reporting; it allows the state to determine added cost funding and fulfills demographic reporting requirements at the federal level. Often, enrollment data feeds into local reports for various district purposes as well. The records you enter are crucial to the reporting cycle and must pass a variety of validation checks. Resolving errors can be a time-consuming process, so you are strongly encouraged to begin entering enrollment data in the fall and use the CTEIS validation tools before other seasonal reports require your focus. This will allow you ample time to contact the CTEIS Help Desk and resolve any problems should you require assistance.

The 4033 Expenditures Report is used by OCTE to verify that districts are spending money properly on CTE programs, and it is due in early November. Keep in mind that schools show how they spent 61a(1) funds received in the previous year, and that you are required to report expenditures for any course that appears on your 4483 Enrollment Report. The Expenditures Report is critical to determining the money your programs receive, and incomplete or flawed reports can lead to the recapture of funds. Make every attempt to complete this report accurately and on time.

The Follow-Up Report is unique in that it requires you to survey CTE students who became concentrators in a CTE program and left school. These surveys help the state to determine how effective CTE programs were in helping students find a career or success in continuing education. Your survey data is due in January, and you may begin surveying your students in the fall, when the opening of the Follow-Up module in CTEIS is announced. After you complete your surveys, you will then enter the information you collected regarding your students' continuing education and employment into CTEIS.

The spring Enrollment and Completion Collection Report determines the final enrollment counts for your CTE programs and is pivotal in determining the 61a(1) funds your programs are eligible to receive. It is due in late June, and to complete this report,

you will enter all course sections and segments taught throughout the year into the CTEIS database. You will also include student enrollments and demographic information, which will be reported to the federal government in the annual CPI Report. Please keep in mind that while the Enrollment Report is due in late June, your student enrollment entries must be completed before the final May data extraction date in order for your students to be counted for funding.

At the end of your school year, you will need to enter your final student grades after classes have ended, and also to verify all data entered into CTEIS before it is locked for analysis by the state. Remember that you may choose to enter your grades manually or use the CTEIS import feature to speed the data entry process. Once completed, the spring Enrollment Report is processed by CTEIS to determine an unduplicated count of CTE students and to provide those students with a completion status. The student's exit status is also updated via the MSDS and determines the students you will survey during the Follow-Up reporting cycle next spring.

If at any time you wish to know when a specific report is due, you may find the due dates online at www.cteis.com, where they are listed in the right panel labeled "Important Dates." Each seasonal report is also described in a corresponding instruction manual, and due dates are published on the covers of these guides as well.

When you are ready to begin working on a report, you may find it helpful to break your tasks down into a series of steps. For each report, you will follow the same procedure: collect data, verify your data, input the data into CTEIS, and complete your report.

First, identify the kind of data you need to collect, as each report has slightly different requirements. In general, you will want to gather data pertaining to course sections, student demographics, enrollments, and teachers. If you are completing the Expenditures Report, you will instead gather expenditure information as it relates to your programs. Follow-Up reporters will generate a list of completers to survey and will collect survey data.

As a CTEIS reporter, try to practice good validation techniques while striving for accuracy, reliability, and timeliness in your data submissions. You are accountable for any data you report using CTEIS, so remember to record the date when you retrieve information from a Student Management System and to observe standard practices when handling confidential information. For the most reliable data, go to the source

that is "closest" to the information you seek—that is, the source most likely to have first-hand knowledge of the data. As an example, program instructors should personally provide and verify information regarding the students enrolled in their programs. Before submitting your data, review it and ask common-sense questions. Does each course section appear on your report? Are the starting and ending dates correct? Are all staff members accounted for? Are students in your classes receiving the segments that will allow them to become completers of a program?

When you are satisfied with the validity of the data you have collected, you may input it into CTEIS. Data entry methods vary for each report, but all entry is managed using the CTEIS website at www.cteis.com. To login, you will need to speak to your Fiscal Agent about setting up a MEIS account and then use your MEIS user name and password to gain access to the CTEIS homepage. Specific instructions for data input are found within each of the report instructional guides, which are handed out at live training sessions. You may also view and download these manuals from the CTEIS homepage as well.

Upon entering all required data into CTEIS, you may begin the process of completing your report. As a building-level reporter, you may use the Data Entry menu in CTEIS to navigate to the "Enrollment Completion" page. Here, you will indicate the year and use the validation tool to check for inconsistencies or errors in your building information. Warnings appear if your data falls outside of the norm. They will not prevent you from completing your report, and if you receive a warning, you should review the message and understand why that portion of your data has been flagged by CTEIS. Errors, on the other hand, must be corrected in order to complete your report. Helpful troubleshooting guides can be found in your report manuals, or you may contact the CTEIS Help Desk at (800) 203-0614, extension 128. When a building's data errors are cleared, you may mark that building "Complete," which locks your data from further editing and checks the building off of your list. Your data becomes available to the Fiscal Agent to review and then is sent to the CEPD Administrator for a final review. Finally, the CEPD Administrator submits the report to OCTE.

Click on the link called "CTEIS Navigation" to learn the different areas of the CTEIS website and how to use them efficiently.

Video 5 – CTEIS Navigation

This is the CTEIS homepage. Notice the user information in the top right corner of the screen as well as the "Log off" button, which will log you out of the system. The menu buttons available to you in the navigation bar will vary depending on your reporting roles and access levels, which are granted by your Level 5 Fiscal Agency Authorized Official. The Announcements panel displays CTEIS updates and will notify you of important system messages. You can access helpful resources by clicking on any of the links in the "Explore Documentation" section, which will direct you to report documentation and online training videos.

The Data Entry Menu contains the tools you will utilize most frequently during your fall data entry process and spring Enrollment reporting. These tools allow you to manage your students, manage your courses, perform mass course edits, manage your enrollment lists, manage staff members, and import data files from your Student Management System into CTEIS.

Another useful item within the Data Entry menu is the "Enrollment Completion" button, which directs you to the Report Submission screen. Here you can validate the data you enter into CTEIS before marking your building complete and submitting your information to your Fiscal Agency Authorized Official for review.

CTEIS can build custom reports that allow you to view the data you have entered into CTEIS in alternative and often useful ways. To access this feature, click the "Building Reports" button from within the Reports menu.

As you work toward completing your reports, you will discover that help is available should you have questions or need assistance. If you have technical questions such as "How do I submit a report?" "I received an error," "I cannot access my data," or "I can't upload my files," contact the CTEIS Help Desk at (800) 203-0614, extension 128, or at (517) 333-9363, extension 128. If you have questions that fall within the realm of proper reporting policy, such as "My segments don't look right," "Should I enter classes using semesters or trimesters?" "Should I enroll a student who moved to another district?" or "What subsections should I use in this course record?" you will need to contact OCTE. Please note that you may request to add yourself to the CTEIS listserv if you wish to

receive automated updates from the CTEIS. Simply e-mail a request to MartinezJ9@michigan.gov.

Thank you for watching the New User Orientation. Please bookmark the CTEIS homepage and watch for announcements regarding continuing training and system updates.