SCHEV PPE Portal User Guide

Updated March 2020

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SCHEV PPE Portal

Use the following link to access the PPE Portal for testing – https://stg-ppe-schev.virginiainteractive.org

General Information (GI)

1.0 GI Sign In Page
Access to the PPE Portal is based on the user's roles (Roles and Permissions explained below). Each user will receive a **Username** and **Password** from SCHEV after attending a **New School Orientation**. If you have not attended a **New School Orientation** click the **New School Orientation** button.

2.0 GI User Sign In
To log or sign into the PPE Portal enter a **User Name** and **Password**, then click "**Sign In**".

3.0 GI Forgot User Name/Password
If a user has forgotten a **User Name** or **Password**, click on the "**Forgot User Name/Password**" link.

The link will take the user to a new screen to enter an email address to retrieve User Name/Password.

Forgot password?

Enter your email.

Email

[Email Link]

The user will be sent an email directing the user to a reset password screen. The screen will show the User Name and email address, and it will ask the user to enter in a new password.

Reset password

Reset your password.

User Name	sch.sarah
Email	Sarah.Mcintosh@egov.com
Password	
Confirm password	

[Reset]

4.0 GI SECURITY AND ROLES

The application has two categories of roles, SCHEV and School. There are varying permissions levels within each category. An explanation of each role and abilities are below.
***Note – Roles will be added as part of Phase 2.

| Role Group	Role Name	Description
SCHEV	Certification Admin	Administrative Personnel Approving Initial and Re-certification
	Admin	Schev Admin (Sylvia, Sandra, Kathlene) Managing Users etc.
	Finance	Financial Admin approving Budget, Composite Score, Surety Information etc.
School	User	Change most of the schools information with a few exceptions
	ReadOnly	View school information but not make any changes
	Financial Officer	Pay for information modifications
	CPA/Accountant	Input Financial Information (Surety and Compsoite Score)
	Admin	Change some protected information and submit information to SCHEV

	Permissions	Roles							
		SCHEV			School				
		Certification Admin	Admin	Finance	ReadOnly	User	Financial Officer	CPA/Accountant	Admin
	View School Information	Y	Y	Y	Y	Y	Y	Y	Y
Step 1	Save Intent to Operate		Y			Y			Y
	Submit Intent to Operate								Y
	Change Status for Intent to Operate	Y	Y						
Step 2	Save Background check								Y
	Save Name Acknowledgement					Y			Y
	Mark Name Acknowledgement Complete /Ready to pay								Y
	Pay for Name Acknowledgement Submission						Y		Y
	Submit Name Acknowledgement								Y
	Change Status for Name Acknowledgement	Y	Y						
Step 3	Save Certification Information					Y			Y
	Save Financial Section					Y		Y	Y
	Upload Supporting Documents					Y			Y
	Mark Certification Application Complete/ Ready to Pay								Y
	Pay for Certification Application						Y		Y
	Submit Certification Application								Y
	Change Status for Certification Application	Y	Y						
	Change Status for Financial Information		Y	Y					
	Change Status for Full Certification	Y	Y						
Adhoc Changes	Save Name/ Campus Location Change					Y			Y
	Mark Change Complete /Ready to Pay								Y
	Pay for Name/ Campus Location Change						Y		Y
	Submit Name/ Campus Location Change								Y
	Change Status for Name/ Campus Location Change	Y	Y						
	Save Location New/Change/Closing Information					Y			Y
	Mark Location Change Complete /Ready to Pay								Y
	Pay for New/Modifications/Closing Location						Y		Y
	Submit Location New/Change/Closing Information								Y
	Change Status for Location New/Change/Closing Information	Y	Y						
	Save New/Modify/Close Programs					Y			Y
	Mark Program Change Complete /Ready to Pay								Y
	Pay for New/Modifications/Closing Programs						Y		Y
	Submit New/Modify/Close Programs								Y
	Change Status for New/Modify/Close Programs	Y	Y						
	Save New/Modified School Personnel Information					Y			Y
	Upload signed copy of qualifications					Y			Y
	Mark Personnel Change Complete/Ready to Pay								Y
	Pay for Personnel Change						Y		Y
	Submit Personnel change								Y
	Change Status for Personnel change	Y	Y						
Re-Certification	Save Enrollment and Graduation Information					Y			Y
	Save Composite Score and Surety Information					Y		Y	Y
	Save Recertification Checklist					Y			Y
	Upload Re-certification Supporting Documents					Y			Y
	Save New/Modify/Close Programs					Y			Y
	Save New/Modified School Personnel Information					Y			Y
	Save Location New/Change/Closing Information					Y			Y
	Mark Re-Certification Complete/ Ready to Pay								Y
	Pay for Re-Certification						Y		Y
	Submit Re-Certification Application								Y
	Change Status for Recertification Application	Y	Y						
	Change Status for Recertification Financial Information		Y	Y					
User Management	View Work Queue and Run Reports	Y	Y	Y					
	Create New SCHEV Account		Y						
	Create New School Account		Y						Y
	Give Level 1 and 2 Permissions		Y						Y
	Give Level 3 and 4 Permissions		Y						

5.0 GI Logging Off

A user will be able to log out of the application at any point. To logout, the user would navigate to the top right-hand side of the screen and click **Log Off**.

Note – depending on where the user is in the application and the last time the user saved, the system might ask the following question in a popup window.
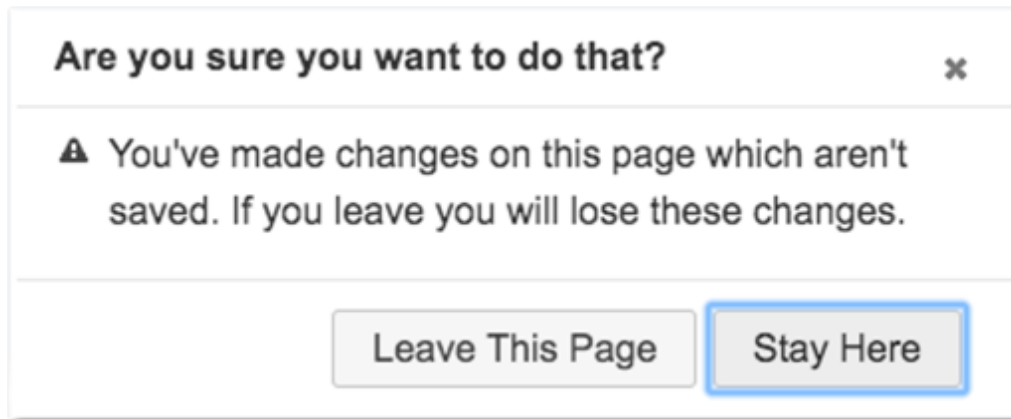
Once the user has logged out, the system will return the user to the Sign In page.

6.0 GI Keyword Search

The **Keyword Search** feature is available on most screens to all roles. To search, the user will type the desired keyword into the search bar and the system will filter the results. To clear the results, either delete or click **Clear**.

School Section User Guide (SSUG)

1.0 School Login and Account Creation

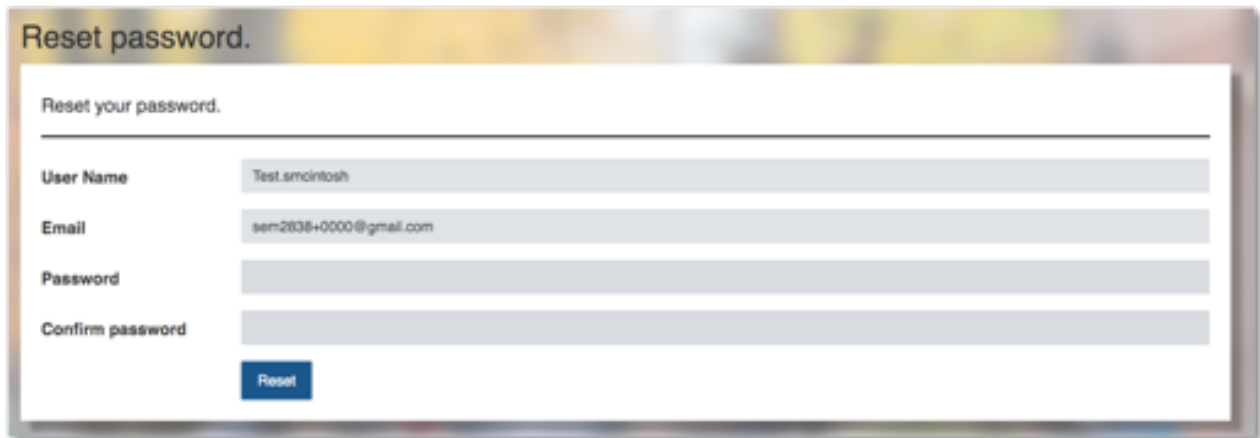SCHEV Admins are responsible for creating all School Admin user accounts for new and existing schools in the PPE Portal.

Once the account has been created by SCHEV, an email will send a request to have the user create a password.
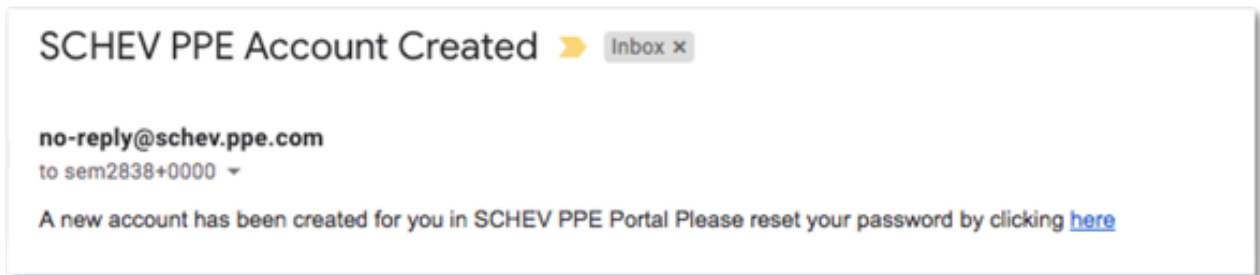

The new user will be instructed to create a new password and click Reset.

Once the password is reset, the School Admin can login with the username and password. Refer to General Information Section 1.0 Log in Page for instructions on logging in, resetting passwords and roles and permissions.

1.1 School Admin Landing Page

A School Admin will see two tabs upon signing in (Schools and Users). Note – other school roles will only see the "Schools" tab upon signing in.
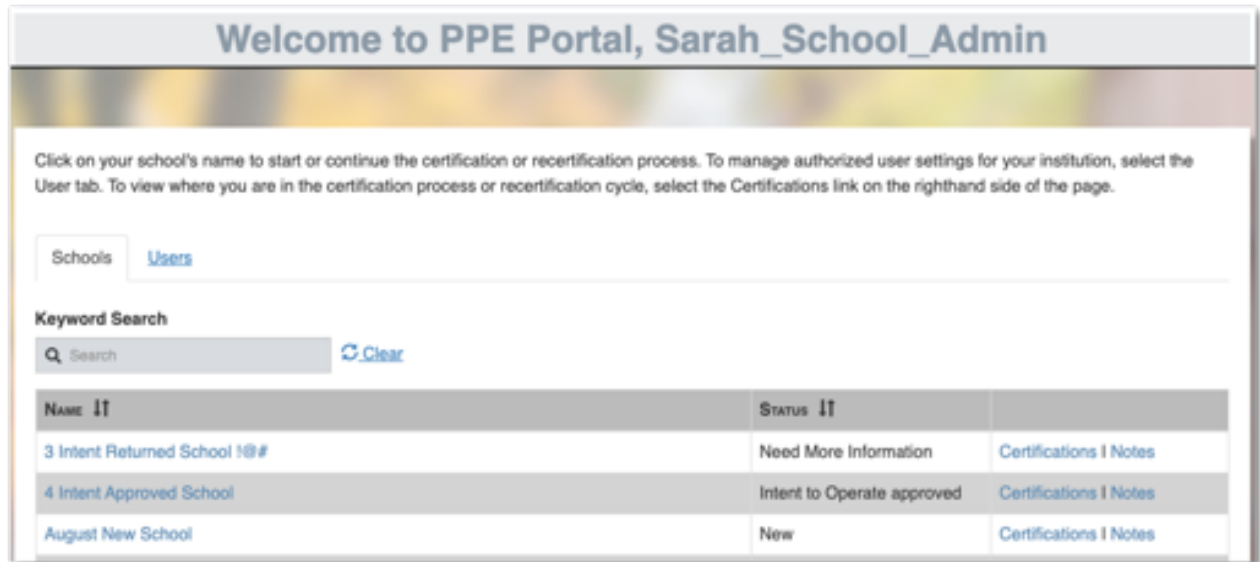
1.1.1 Schools Tab

The Schools tab will display a list of all schools associated with that user, the status of the school(s), certification(s), and external notes. Note - A School Admin account can be associated with more than one school.

1.1.1.1 Name

Under the **Name** column will be the school's name that the SCHEV admin entered into the application. The name can change throughout the certification application process.

To enter the school's profile to start the Certification or Recertification Application, the school users will click on the *School Name*.

1.1.1.2 Status

The status section will show the school user the current status of that school. For a complete list of statuses please refer to **Section 2.1.1 Statuses**.

1.1.1.3 Certification/Notes

The Certification section will show a complete history of the certification history tied to that school. To view the certification history, click on **Certification**.

Note – each certified school will have their own certification history.

The notes section will show the school users external SCHEV notes. To view notes, click on **Notes**.

The user will be able to view all external notes.

1.1.2 School Users

Only school administrators will have access to the **Users** tab. The **Users** tab will show a list of all users that have access to that school, including username, email address, school name, and role. Note - the school administrator cannot edit or delete other school administrators. Only SCHEV administrators have the ability to edit school administrator's access. School administrators can add, edit and delete other school users' roles.

Click on your school's name to start or continue the certification or recertification process. To manage authorized user settings for your institution, select the User tab. To view where you are in the certification process or recertification cycle, select the Certifications link on the righthand side of the page.

Schools   **Users**

↪ Add New User
Keyword Search

🔍 Search   ⟳ Clear

USER NAME	EMAIL	SCHOOL	ROLE
Sarah_School_Admin	sem2838+2838@gmail.com	New School 101	School Admin

1.1.2.1 Adding a School User

The School Admin can add new users for the school. To add a new role, click on **Add New User** and a **Create a new account** pop up will appear. The school admin will input the required fields then select **Register** to fully create the account.
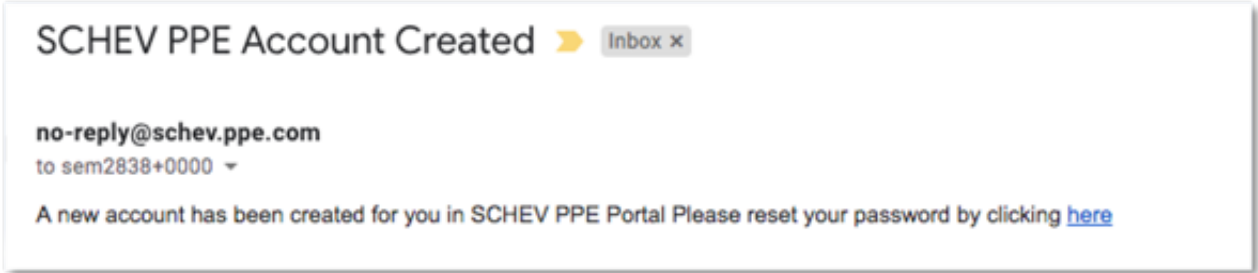
Create a new account   ✕

Email

User Name

User Role ◯ CPA   ◯ Financial Officer   ◯ Read Only
◯ User

Schools   Begin typing for a list of schools.

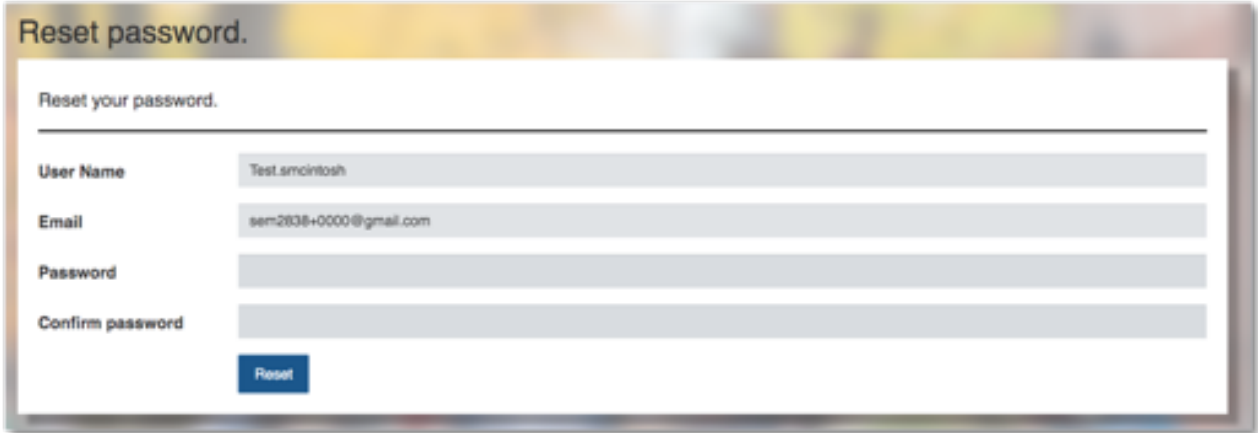**Register**

Note – School Admin roles can only be added by SCHEV Admin.

Once the account has been registered, the entered email address will be emailed and asked to reset a password by clicking **on the link in the email**.
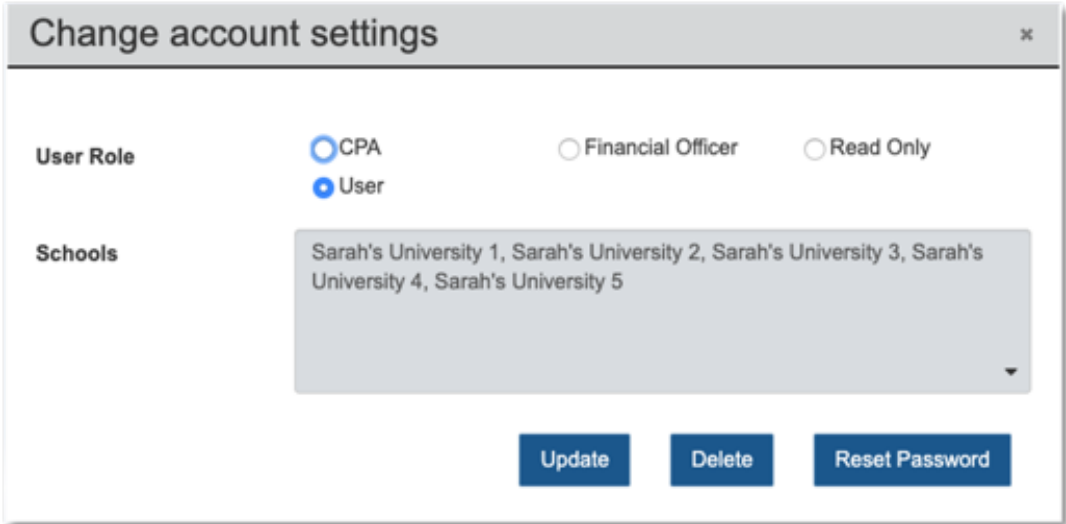
SCHEV PPE Account Created ▸ Inbox ×

no-reply@schev.ppe.com
to sem2838+0000 ▾

A new account has been created for you in SCHEV PPE Portal Please reset your password by clicking here

The new user will be instructed to create a new password and click **Reset**.

Reset password.

Reset your password.

User Name	Test.smcintosh
Email	sem2838+0000@gmail.com
Password	
Confirm password	

Reset

1.1.2.2 Editing and Deleting a School User

To edit a school user, the Admin will click on the User name. Once clicked, the current user's role will appear on the screen. The Admin user will have the ability to change the user role, associate to a different school, reset the user's password or delete the user.


Change account settings ✕

User Role	○ CPA ○ Financial Officer ○ Read Only ● User
Schools	Sarah's University 1, Sarah's University 2, Sarah's University 3, Sarah's University 4, Sarah's University 5

Update   Delete   Reset Password

2.0Certification/Recertification Application

To start or continue working on the Certification/Recertification application, the school user will click on the *School Name* under **Name** in the **School** tab.
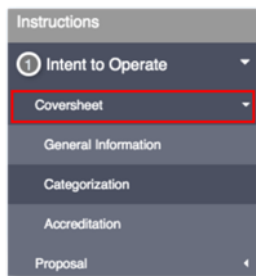
2.1 Navigation

Once in the school's profile, the user will be redirected to the **Instructions** page. While on the instruction page, the user can click the steps and the appropriate accordion will open up. The user can close the accordion by clicking on the accordion name.
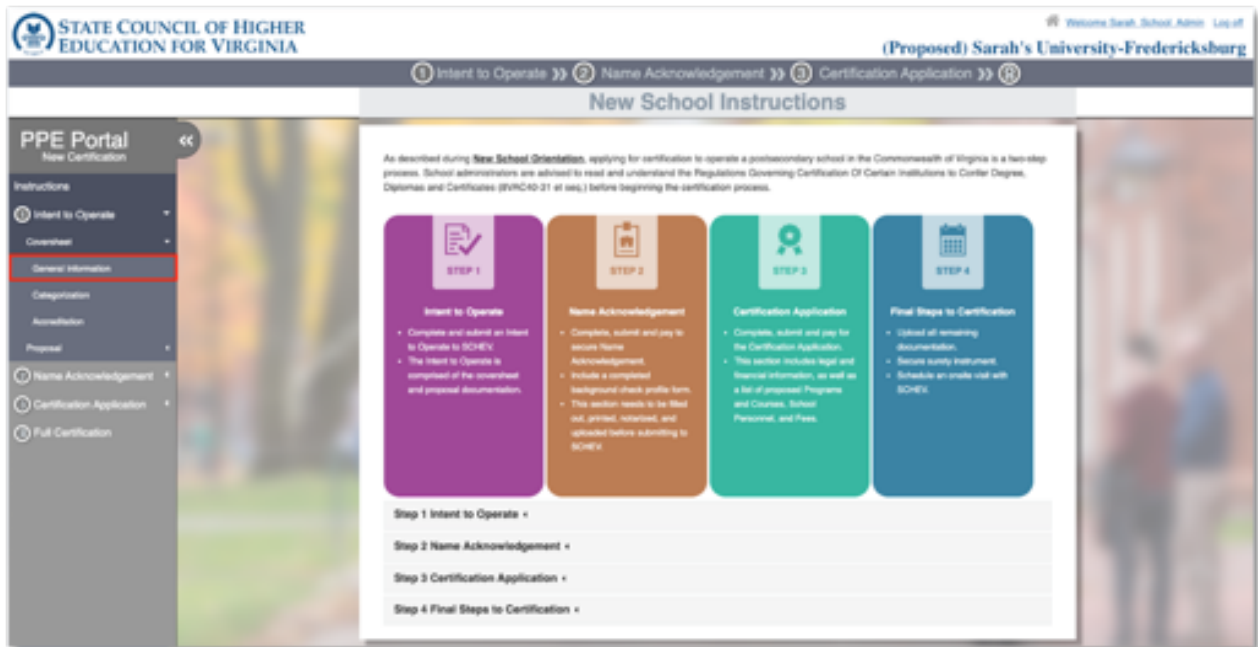
To navigate to other sections, the school will use the left-hand navigation.

2.1.1 Left-Hand Navigation

The left-hand navigation panel allows users to navigate through the portal in sequential and non-sequential order. It will also show the user a high-level overview of the certification and recertification application process. Arrows located on the left indicate the step has multiple sections. Indentation represents that the step is part of the above section.

Note – the left-hand navigation will change when the school has received certification.

The left-hand navigation can be minimized to allow for more room on the screen. To minimize the navigation, click on the arrows on the left side.
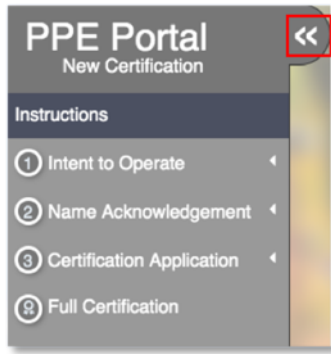
2.1.2 Navigating to Landing Page

The user can navigate back to the landing page by clicking on the **SCHEV logo, home icon** or the **user name** at the top of the page.
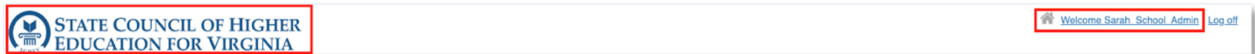
2.1.2.1 Status/Action Log

The status section will appear on the application after the Intent to Operate has been submitted. The status section will show the school user's a history of the latest certification including year. To change the certification year, click on Certification from the home page, then select a specific year.

To view the change history, click on the Details button.

Status information for selected/ lastest certification.

CYCLE YEAR	SECTION	STATUS	SUBMITTER	DATE	
2019	Intent to Operate	Intent to Operate approved	sch.sarah	7/22/2019 3:14:55 PM	Notes
2019	Name Acknowledgement	Name Acknowledgement approved	sch.sarah	7/22/2019 4:15:56 PM	Notes

2.2 Coloring, badges, and icons

The PPE Portal includes color coded icons show SCHEV and school users a quick snapshot of the current certification step. During initial certification, the color-coded icon will appear on the top status bar. During initial certification and recertification, the left-hand navigation will use color-coded icons.
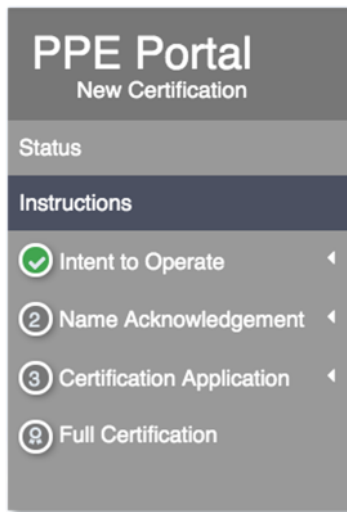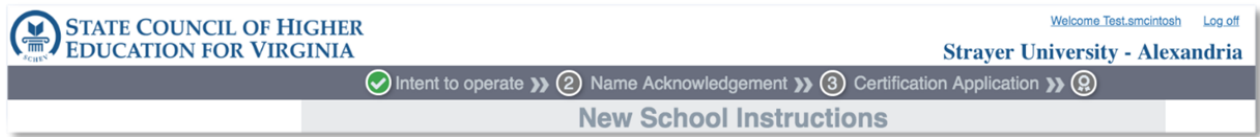
Color/Icon	Meaning
	School has submitted an item or step to SCHEV for review.
	SCHEV has reviewed the item or section and it has been approved.
	SCHEV has reviewed the item or section and it has been rejected.
	SCHEV has reviewed the item or section, but more information is needed from the school.

2.3 Working on the Application

The School user will fill out the Certification and/or Recertification Application using the PPE Portal.

2.3.1 Collapsing and Expanding the Sections

Once in the school's profile, the user can click **Collapse All** to show all sections on the page.

The user can click **Expand All** or click on the section head to see the section(s).

2.3.2 Help Icons

Different sections will have **Help Icons** which will give more information to the user when filling out the application. To view the **Help Icons**, click on the Question Mark Icon ("?") in the title row of each section.

Once clicked, the popup with the Help Text will appear on the screen.
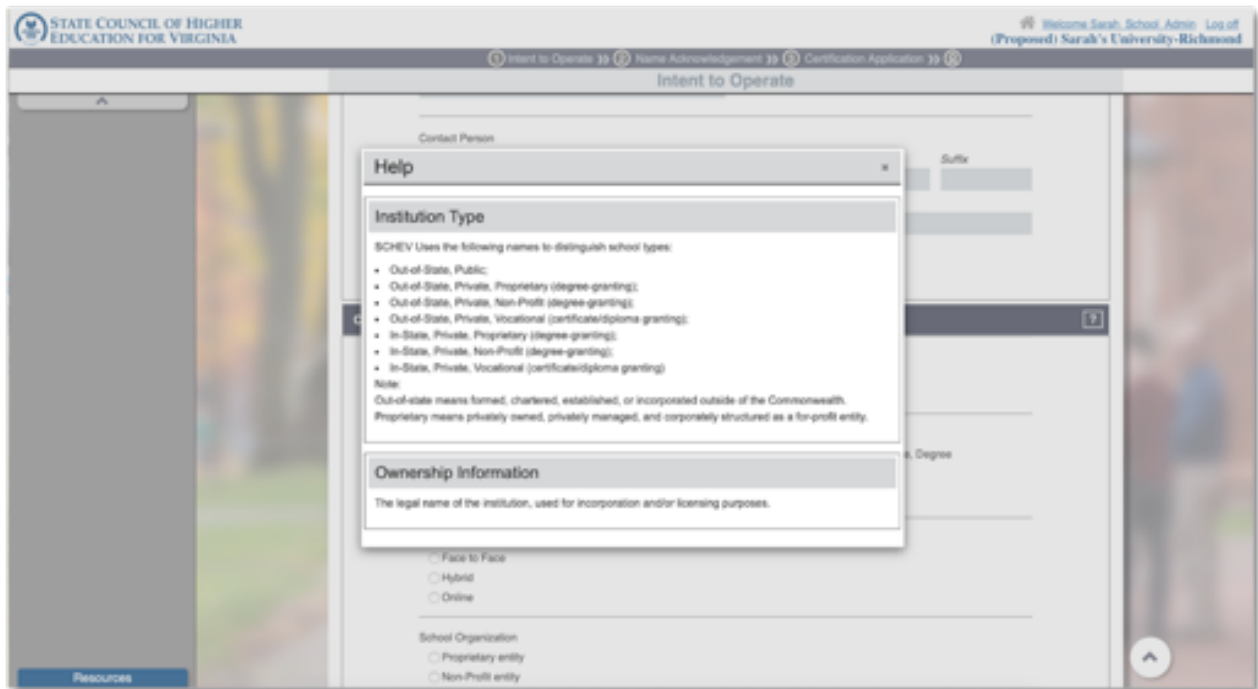
2.3.3 Saving the Certification Application

The School user, with the appropriate permissions, can save the application at any time, by clicking **Save** located at the bottom of the page. Note – Not all school users are able to save changes.

2.3.4 Filling out the Certification Application

The School user will fill out the certification with text, drop-down boxes, check boxes, radio buttons, or by uploading documents. Note – not all users are able to save changes.
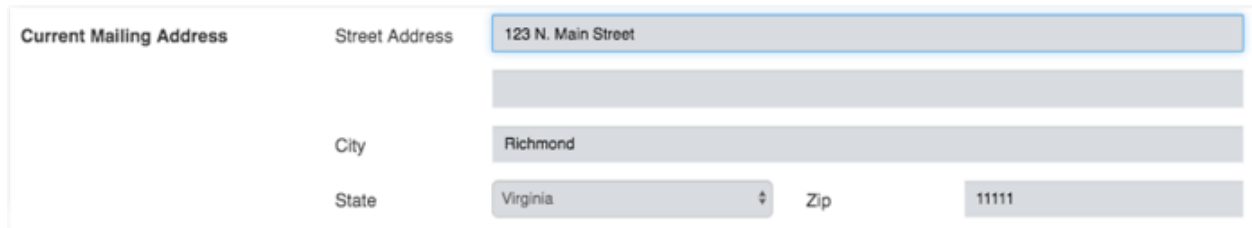
2.3.4.1 Text Boxes

Text boxes allow the schools to type in information. Note – the types of characters allowed in a text box are dependent on the text box. For example, phone number text boxes do not allow for letters to be entered.
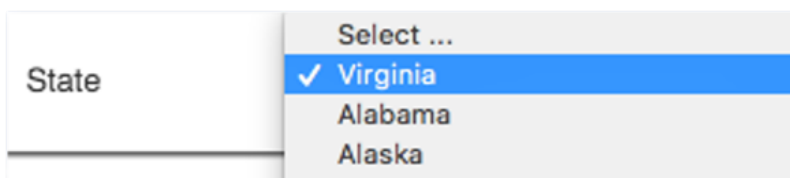
| Proposed School Name | New School 101 |

2.3.4.2 Drop-Down Boxes

Drop-down boxes allow the user to select an option from a drop-down list. Drop-down boxes are indicated by the arrows at the end of the entry field. Once the item is clicked, a drop-down list will appear and will allow the user to make a selection.

Current Mailing Address	Street Address	123 N. Main Street		
	City	Richmond		
	State	Virginia	Zip	11111
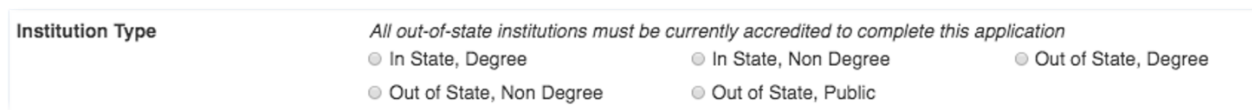
State	Select ...
	✓ Virginia
	Alabama
	Alaska

2.3.4.3 Radio Buttons

Radio buttons allow the user to select one option from a list.

Institution Type	All out-of-state institutions must be currently accredited to complete this application
	○ In State, Degree ○ In State, Non Degree ○ Out of State, Degree
	○ Out of State, Non Degree ○ Out of State, Public

2.3.4.4 Check Boxes

Check boxes allow the user to select multiple options from a list. The user will click on the items to select and unselect.

2.3.4.5 Uploading Documents

Some fields require the school to upload documentation. To upload a document, click the **Upload** button. A popup to attach a document will appear on the screen. Note- all users are able to upload documents.

Once the document is uploaded the file will appear on the screen with a successful save message. To view the file, click on **View**. To delete the document, click on **Delete**. Note – not all users are able to delete uploads.

2.3.4.6 Downloading Documents to Sign

Some sections of the Certification and Recertification application require a wet signature. Areas that require a signature are represented by an edit icon. Note – not all users are able to download documents.

Background Check

Once the form is completed, please have the President and/or CEO sign, print, scan, and upload a digital version of the form with their signature. Personally identifiable information will be securely encrypted.

[Upload] Only PDF files allowed. Once uploaded, files(s) will appear here.

Once the edit icon is clicked, the information will appear as a popup on the screen.

Background Check   ×

Full Name

Title	First	Last	Middle	Suffix
Mr.	Hunter	Thompson	Alan	Jr

Alternate First Name   Alternate/Maiden Name

Personally identifiable information (Securely Encrypted)

Social Security Number   Date of Birth

Current Residential Address

Street Address

7202 Branico Dr Ste 200

City	State	Zip
Roanoke	Virginia	24018-5344

Previous Residential Address

Street Address

3014 Fendall Ave Fl 10

City	State	Zip
Richmond	Virginia	23222-2608

Phone Number	Extension	Email
(540) 355-6771	123	huntersthompson@books.com

[Download to Sign]

The school user will fill out the required information on the screen, then click download to sign. The document is downloaded as a PDF file and when clicked, the completed form (as a PDF file) will open in a new tab.

BackgroundCh....pdf ^

Background Check Profile Form

Full Name:	Butler		First		Douglas		Suffix:	Jr
	Last	Kyle			Middle			

Alternate First Name:		Alternate/Maiden Last Name:	

Full Social Security Number	111-11-1111	Date of Birth:	01/01/1980

Phone # :	(804) 555-5555- 123	E-mail Address:	sarah.mcintosh@egov.com

Current Residential Address : 119 W Broad St Ste 100
Richmond, VA-23220-4214

Previous Residential Address :

I certify that the foregoing statements are true and correct. I do hereby agree, consent and direct that any person or entity maintaining information in any form relating to my criminal history shall release all such information upon request of the State Council of Higher Education for Virginia. I do hereby agree and permit the State Council of Higher Education for Virginia to obtain from any person or entity information relating to my personal background, reputation, and character, and do hereby expressly direct that any such person or entity release such information upon the request of the State Council of Higher Education for Virginia, its agents or representatives, and any person or entity so furnishing information from any and all liability of every kind arising thereof.
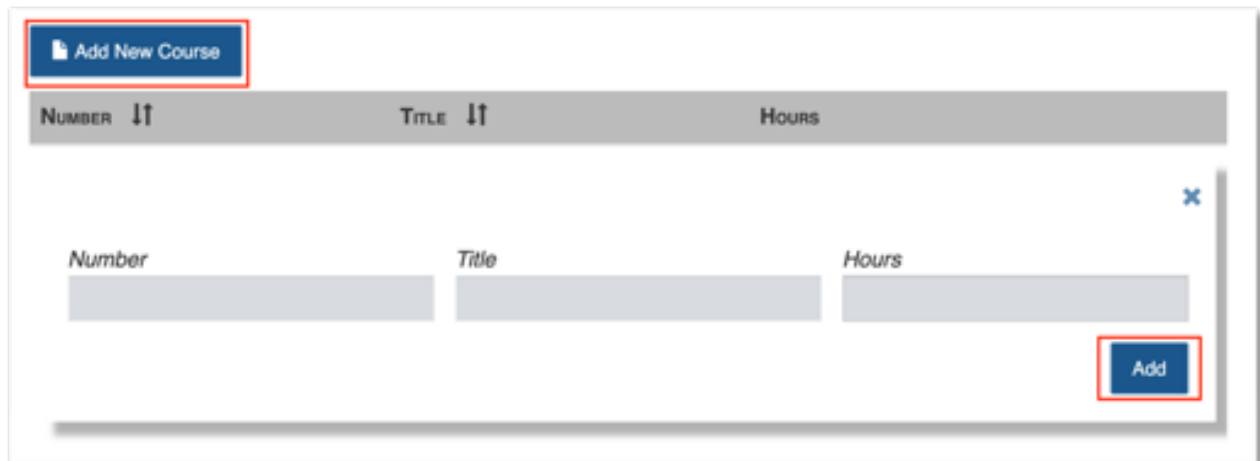
Signature of Applicant: _____   Date: _____

After the document is signed, the school user will upload the document to the appropriate section.

Note – Some uploaded documents have restrictions that prevent other users from being able to view the document (e.g. Background Check document is only viewable by school admins)

2.3.4.7 Adding information on screen or as a popup

Some sections allow the user to add information as a popup on the screen (e.g. Courses). To add information, click on the **Add New** button and the screen will expand, showing more text input boxes. To add or save information, the user will select **Add**.

The user can enter information, close without saving, save/add the information, or edit the information at a later point in time.

2.3.4.8 Editing or Deleting Information on Screen

Once information is added on screen the user is able to edit and delete the information. To Edit or Delete, the user will need to select **Edit** or **Delete**.

If **Edit** is selected, the user will update information and select **Save**. If **Delete** is selected, the user will be asked to confirm the action, then the information will be removed from the table.

2.3.4.9 Type in Drop Down Box

Some sections of the application allow the users to begin typing in a drop-down box to filter options.

As the user types, the list will automatically filter. Once the option is identified, the user is able to click on the appropriate option.

2.3.4.10   Viewing links

There are informational links throughout the application. The links will follow the typical link format, being blue and unlined. To view the link, the user will click on it and the application will direct the user to the appropriate webpage.

CIP Code
According to the US Department of Education, the Classification of Instructional Programs (CIP) provides a taxonomic scheme that supports the accurate tracking and reporting of fields of study and program completions activity. A full listing of all CIP codes is available here.

Begin typing for a list of CIP codes.

2.3.5 Submitting the section

If the School user is ready to submit the application, the user will click on **Submit to SCHEV** at the bottom of the screen. Note – not all users are able to submit sections to SCHEV.

Expand All

General Information ◄

Categorization ◄   ?

Accreditation (Required) ◄   ?

Save   Withdraw Application   Submit to SCHEV

If a section is submitted to SCHEV before all fields are completed, the user will get an error message at the top of the page that states which sections are incomplete. Note – each page will have different mandatory field requirements.

Please provide following information before submitting inforation to SCHEV

Accreditation Information

Proposal Documentation

Once the required information is entered and the application is submitted to SCHEV, the user will get the following message saying the section was submitted successfully.

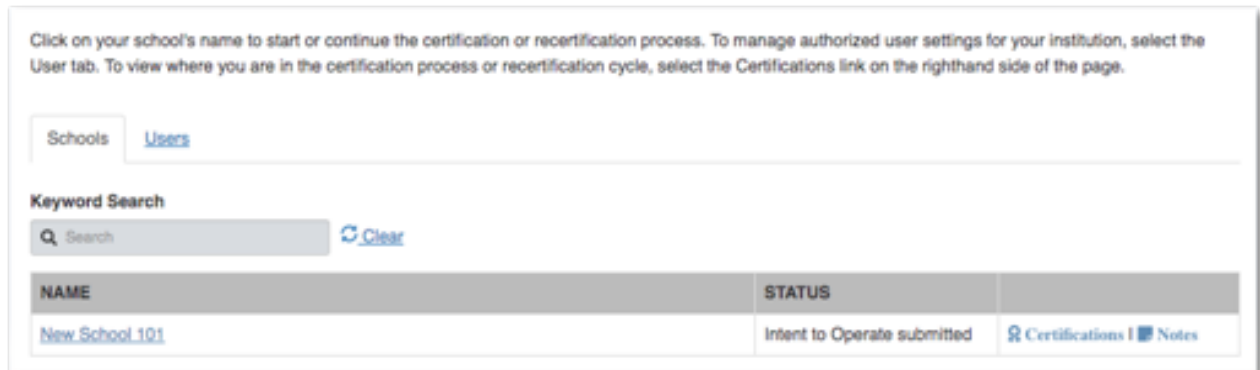Post Status   ×

Intent to operate submitted successfully.

Close

Intent to operate   ment ❯❯ ③ Certification Application ❯❯

ate: Proposal

Intent to Operate requires that you   ific topics in narrative form. First, select the type of school you are proposing
perate:

The status of the school will change, and the item will appear in the SCHEV work queue to be reviewed.

Click on your school's name to start or continue the certification or recertification process. To manage authorized user settings for your institution, select the User tab. To view where you are in the certification process or recertification cycle, select the Certifications link on the righthand side of the page.

Schools	Users

Keyword Search

🔍 Search   🔄 Clear

NAME	STATUS	
New School 101	Intent to Operate submitted	👤 Certifications I 📝 Notes

2.3.6 Locked Application

Once a section of the Certification or Recertification application has been submitted to SCHEV for review, that section is locked and cannot be edited. The only time a user can edit a previous section is when the status of the school is changed to **Need More Information** by a SCHEV admin user.

2.4 Certification and Recertification Steps

The initial certification is divided into four parts, **Intent to Operate, Name Acknowledgement, Certification Application, and Full Certification**. The school user will begin the application with the **Intent to Operate**. Once the **Intent to Operate** has been submitted to SCHEV for review the school cannot submit other sections of the application until the **Intent to Operate** has been approved. However, the school can work on and save other sections of the application. Once the **Intent to Operate** has been approved, the school can work on and submit the Name Acknowledgement section. Note - once a section is approved by SCHEV, the information is locked and is unable to be edited by the school.

After the school is fully certified, the school will need to go through a yearly Recertification cycle. Recertification is divided into multiple sections, but all sections are submitted to SCHEV at the same time. The sections include, **General Information, Instructional Locations, Programs/Courses, School Personne, Financial Information, Enrollment/Graduation Data, Supporting Documents and Checklist.**

The school user will receive an email notification about their upcoming Recertification cycle. Once logged back in the application, the school(s) currently in the recertification cycle will have a recertification badge next to the school name.

2.4.1 Intent to Operate

The Intent to Operate is the first part of the certification application and comprised of the **Coversheet** and the **Proposal Upload** section. The **Coversheet** will ask basic information about the proposed school and the **Proposal** section will require the school users to upload a number of documents.

The School users will follow the steps outlined in **Section 2.3.2 Filling out the Certification Application**.
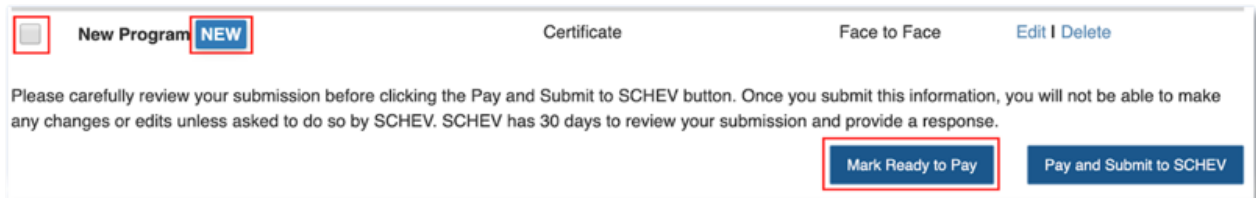
2.4.2 Name Acknowledgement

The Name Acknowledgement section of the certification application will carry over some basic information submitted by the school from the Intent to Operate section.

To submit the Name Acknowledgement, the school will have to make an online payment. The school admin can either click, **Submit to SCHEV** and be taken to the checkout process, outlined below in **Section 2.4.2.1 Checkout Process**, or the school user can select **Mark Ready for Pay**.

2.4.2.1 Mark Ready for Pay
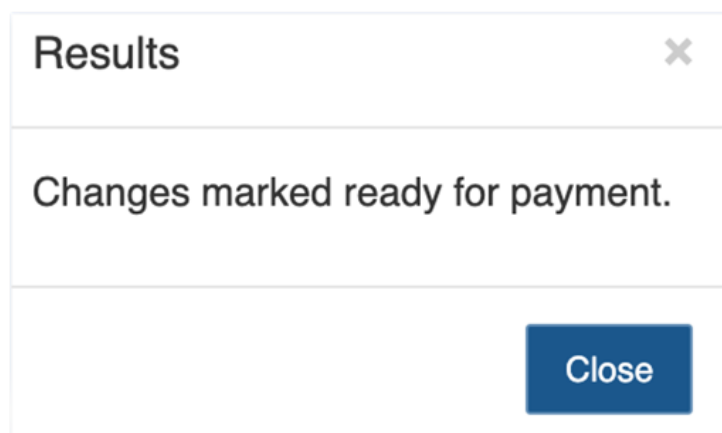
Selecting **Mark Ready for Pay** will allow a Financial Officer user to pay for the submission.

Once the Name Acknowledgement section is ready to be paid for or a new item is ready to be paid for, the user would select the item that needs to be submitted and select Mark ready for pay.

The user will see a success message when the item has been successfully marked for payment.

The Financial Officer user will have to sign into the application, click on the school name, and select **Pay for pending changes**. Once selected, the user will be directed to the checkout process, outlined in **Section 2.4.1.2 Checkout Process**.

2.4.2.2 Checkout Process

Unlike the Intent to Operate section, this section of the application requires payment to SCHEV before submission. Once the School Administrator or Financial Officer selects Pay, the system will redirect the user to the checkout pay to submit payment.

STATE COUNCIL OF HIGHER EDUCATION FOR VIRGINIA

Transaction Detail

SKU	Description	Unit Price	Quantity	Amount
	PAYMENT - Strayer University - Alexandria	$300.00	1	$300.00
Total				$300.00

Transaction Summary

PAYMENT - Strayer University - Alexandria	$300.00
TOTAL	**$300.00**

Need Help?

Please complete the Customer Information Section

Payment

Payment Type ✔

Credit Card

Customer Information

Complete all required fields [*]

Country

United States ⇅

First Name *

Last Name *

Company Name

Address *

Address 2

City *

State

Select State ⇅

ZIP/Postal Code *

Phone *

Next ❯

Payment Info

The user will enter in Customer Information and Payment Information, then select **Submit Payment**.

Payment

Payment Type	✓

Credit Card

Customer Information	✓

Edit

Address
Sarah McIntosh
VI
119 W Broad Street
Richmond, VA 23230

Phone
5403556771

Country
United States

Email Address

Payment Info	✓

Edit

Credit Card
Visa ****1111
Exp. 06/2022

Name on Credit Card
Sarah McIntosh

Verification

HXKPA

Enter the characters from the above image:

HXKPA

Cancel | Submit Payment

After the payment has gone through, the receipt will appear on the screen and will be emailed.

Payment Receipt Confirmation

Your payment was successfully processed.

Print 🖨

Transaction Summary

Receipt Confirmation

Description	Amount
	$300.00
Total Amount Paid	$300.00

Customer Information

Customer Name	Sarah McIntosh	Receipt Date	7/22/2019
Company Name	VI	Receipt Time	04:03:54 PM EDT
Local Reference ID	S19072215544303		

Payment Info

Payment Type	Credit Card	Credit Card Number	******1111
Credit Card Type	VISA	Order ID	42686226
		Name on Credit Card	Sarah McIntosh

Billing Information

Billing Address	119 W Broad Street	Phone Number	5403596771
Billing City, State	Richmond, VA		
ZIP/Postal Code	23230		
Country	US		

Continue

Note –The Name Acknowledgement section is not submitted to SCHEV until the payment has been submitted and marked as successful. If the payment is unsuccessful, the section will not be submitted to SCHEV.

The user will click **Continue** to return to the application. Upon returning to the application, the user will be notified that the Name Acknowledgement has been successfully submitted to SCHEV.
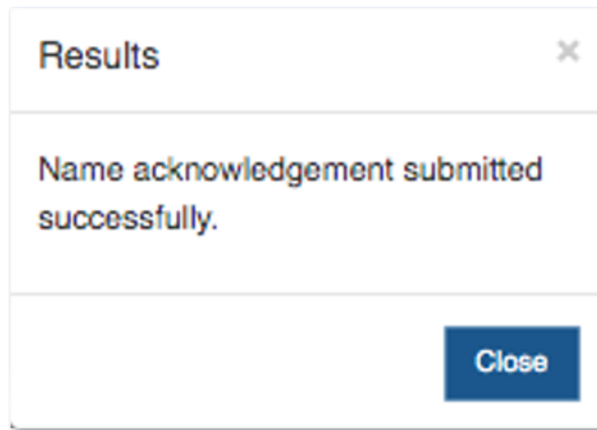
2.4.3 Certification/Recertification Application

There are a number of sections that need to be completed during the Certification Application step before submitting to SCHEV. The information under this section requires the school to enter new information and verify previously submitting information that has been carried over from previous steps.

A number of the sections in Initial Certification are carried over to the Recertification Application. During recertifications, the schools are able to edit some General Information and add, modify and delete Programs/Course, School Personnel, and Instructional Locations.

2.4.3.1 Legal Tab

Part of the Initial Certification, the **Legal** tab displays some information from previous sections and requires the school to enter and upload additional information. The previously entered information is not editable on this screen (e.g. **School Organization**, **School Ownership** and **Main Campus Location**).

2.4.3.2 Programs/Courses

During Initial Certification, the school user can add Programs and create Courses. Schools are able to create, modify, and delete Programs and/or Course during or outside of recertification. Note - Course are tied to Program. Courses cannot exist outside of Programs.

The Programs tab will show a list of Programs associated with that school. From the Programs tab, the user can **Add**, **Edit** or **Delete** Programs, as well as enter estimated annual enrollment for all Programs.

2.4.3.2.1   *Adding a New Program*

To add a Program, navigate to the Program & Courses tab and click **Add New Program**.

Schools must provide SCHEV with a complete list of programs that will be offered; the appropriate CIP code for each program; the credential awarded (e.g. certificate or degree); the number of credit hours required to complete program; and any necessary supporting documents.

To create a new program, please click on "Add New Program". You can also edit or delete programs and courses by clicking the "Edit" button.

▶ Add New Program

Keyword Search

Q Search   ↻ Clear

NAME ↓↑	CREDENTIAL TYPE ↓↑	PROGRAM FORMAT ↓↑	
Test	Associate	Face to Face	Edit I Delete

Estimated Annual Enrollment   Estimate an annual enrollment number for all students participating in above programs.

0

Save

The system will direct the user to the **New Program** page. The school user will fill out and upload all information relating to the program. One of the required pieces of information under Programs is courses.

2.4.3.2.2   Adding a New Course

To add a new course, click **Add New Course**, type in required information, then hit **Add**. Once the course is added, the number of hours from that course will be applied to the total number of hours for that program.

Program Breakdown by Course ▾

To create a new course, please click on the "Add New Course".
You can also edit or delete existing courses.

▶ Add New Course

NUMBER ↓↑	TITLE ↓↑	HOURS

✖

Number   Title   Hours

Add

Entered courses fulfill 0 out of 160 hours

Once all of the required fields are filled out and all necessary documents are uploaded, the user can save the program by clicking **Save** at the bottom of the page. The new proposed program will show on the Programs Page.

Note - Outside of initial certification the new program will show a NEW badge next to the program name.

2.4.3.2.3   Editing a Program

To edit a program before the certification application has been submitted to SCHEV or during recertification, the school user will click on **Edit**, make updates, then click **Save**.

Note: Editing a Program outside of initial certification will follow the same process, however, after initial certification or between recertification cycles, users will have to submit each Program change to SCHEV for review. See section **AC 4.0.9 Adding or Managing Programs** for additional details.

2.4.3.2.4   Editing a Course

To edit a course, the user will follow the steps in **Section 2.4.2.3.3** to Edit to the Program. While on the Edit Program page, the user would navigate to the Courses section and click **Edit**.

Note - Deleting or Editing a Course modifies the Program. If a course is Deleted or Modified outside of initial certification or between recertification cycles, the user will need to submit each Program Modification to SCHEV. See section **AC 4.0.9 Adding or Managing Programs** for additional details.

2.4.3.2.5   Deleting a Course

To delete a course before the certification application is submitted to SCHEV, the user will follow the steps in **Section 2.4.2.3.3** to Edit to the Program. While on the Edit Program page, the user would navigate to the **Courses** section and click the **Delete** link.

After the user selects **Delete**, a popup would appear on the screen confirming that the course should be deleted.

Once deleted, the course would be removed from the course table and the number of course hours would be subtracted from the total.

Note - Deleting or Editing a Course modifies the Program. If a course is Deleted or Modified outside of initial certification or between recertification cycles, the user will need to submit each Program Modification to SCHEV. See section **AC 4.0.9 Adding or Managing Programs** for additional details.

2.4.3.2.6   Deleting a Program

To delete a program before the certification application has been submitted, the school user will click **Delete**.

A popup will appear on the screen and the user will click **Delete** to delete the program. Once delete is selected, the program will be removed from the Program table.

Remove program from school

Are you sure you want to remove this program from school?

Program Name: Programming
Total Hours: 25
Total Cost: 1000.00
Credential Type Certificate
Program Format Hybrid
Proposed/Actual Start Date 2/10/2020

Delete

Note: Deleting a Program outside of initial certification will follow the same process, however, after initial certification or between recertification cycles, users will have to submit each Program change to SCHEV for review. See section **AC 4.0.9 Adding or Managing Programs** for additional details.

2.4.3.3 School Personnel
During Initial Certification, the school user can add School Personnel. Schools are able to create, modify, and delete Personnel during or outside of recertification.

The Personnel tab will show a list of Personnel associated with that school. From the Personnel tab, the user can **Add**, **Edit** or **Delete** Personnel.

Note - The section might have personnel listed already from the Name Acknowledgement section (Primary Contact or CEO/President) . Review **section 2.4.2.4.2 Editing or Deleting School Personnel** to add information on existing Personnel.

2.4.3.3.1   Adding New Personnel
To add a new Personnel, the school user would click **Add New Personnel**.
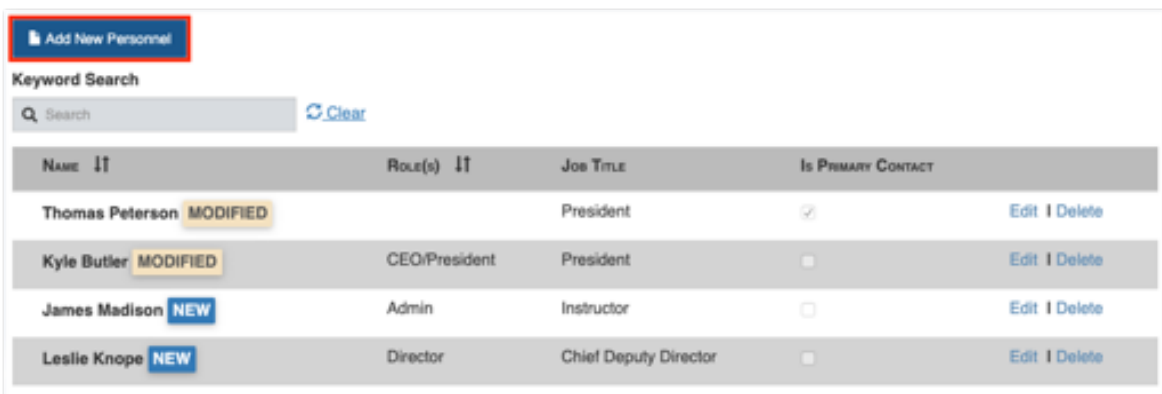
The school user would fill in and upload all required documentation for the Personnel.

Note – depending on the school type (e.g. Degree Granting, Non-Degree Granting) the school user would have a different **Categorization** options to choose from.

Note – depending on the which **Categorization** the school user chooses (Owner, CEO/President, Board Member, etc) the school user would have different **Verification of Qualifications** and might have to complete a **Background check**.

2.4.3.3.2 Uploading Documents in a New School Personnel's Profile
Some sections of the New Personnel page require the Personnel page to be saved before adding information (e.g. Education, Certification, and Work Experience).

Once the profile is saved, the user can input required information. These sections work similarly to **Section 2.3.2.7 Adding information on screen** where a popup will appear on the screen and the user will input information and select **Save**.

When information is entered into the Personnel's profile such as work experience, certification, and education, the user can edit or delete the information by clicking on the appropriate **Edit** or **Delete** links.

2.4.3.3.3   Editing or Deleting School Personnel

The **Edit** link will allow the school users to edit existing Personnel. To edit the Personnel, click the **Edit** icon, enter all required information, then hit **Save**.

To delete a Personnel, click on the **Delete** link. Note – The school user can delete Personnel without charges before the Certification Application is approved by SCHEV.

Note: Editing or Deleting a Personnel outside of initial certification will follow the same process, however, after initial certification or between recertification cycles, users will have to submit each Personnel change to SCHEV for review. See section **AC 4.0.8.1 Submitted Personnel Change to SCHEV** for additional details.

2.4.3.4 Locations Tab

The School will not be able to add an Instructional Location during initial certification. After initial certification or during recertification, the **Locations** tab will appear and allow the school to manage Instructional Locations. Note – the school will not need to add in Location information for the main campus.
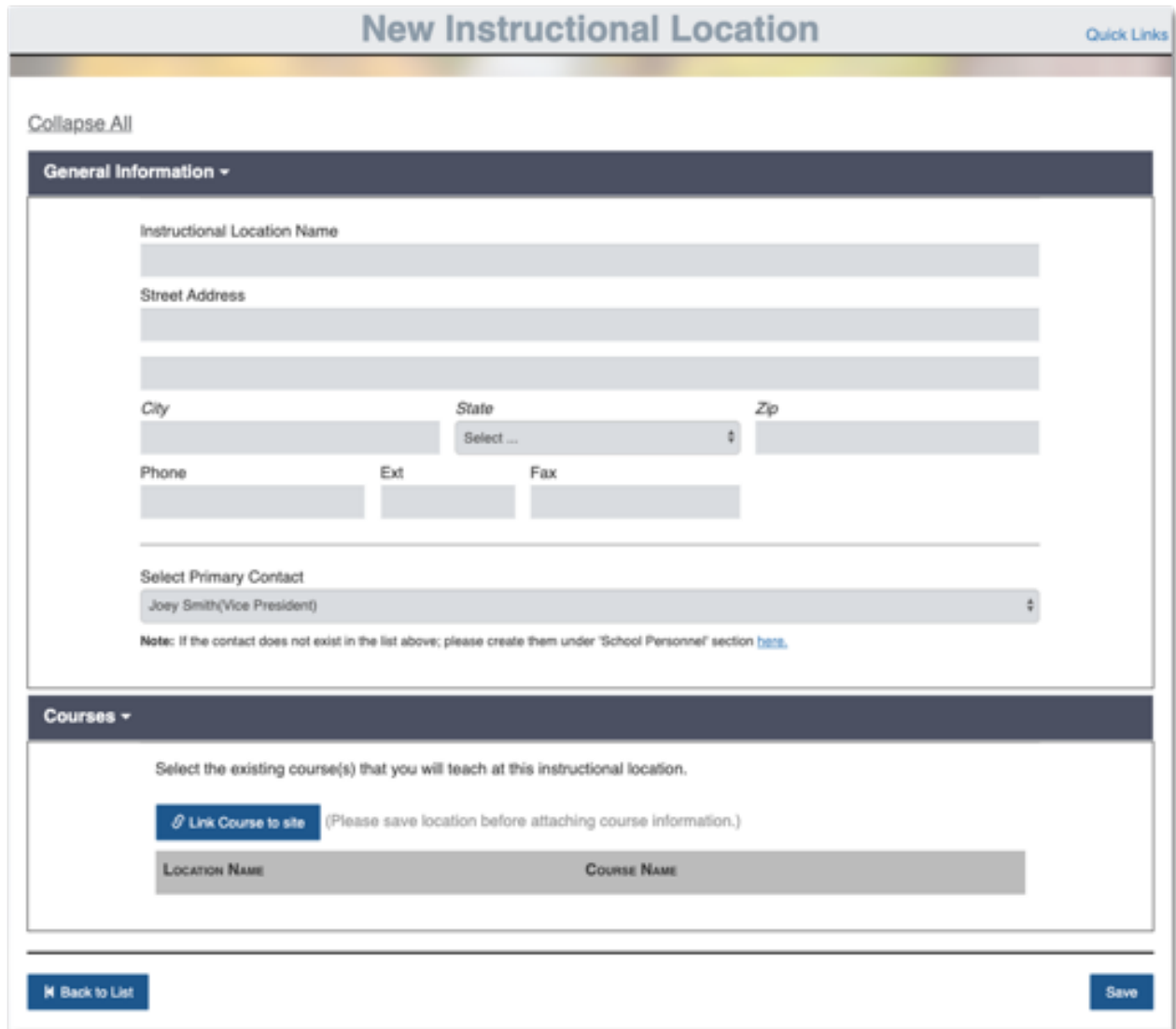
2.4.3.4.1 Adding a New Instructional Location

To add a new location, the user will click on the **Add New Instructional Location** button.

The system will redirect the user to the **Add New Instructional Location** page. The school user will fill out information for the new site. Note – The user is only able to add existing courses to the New Instructional Location.

2.4.3.4.2 Selecting a Primary Contact

The user will need to assign a Primary Contact to the new Instructional Location. To assign a Primary Contact, the user will click on the dropdown box and select a Primary Contact.
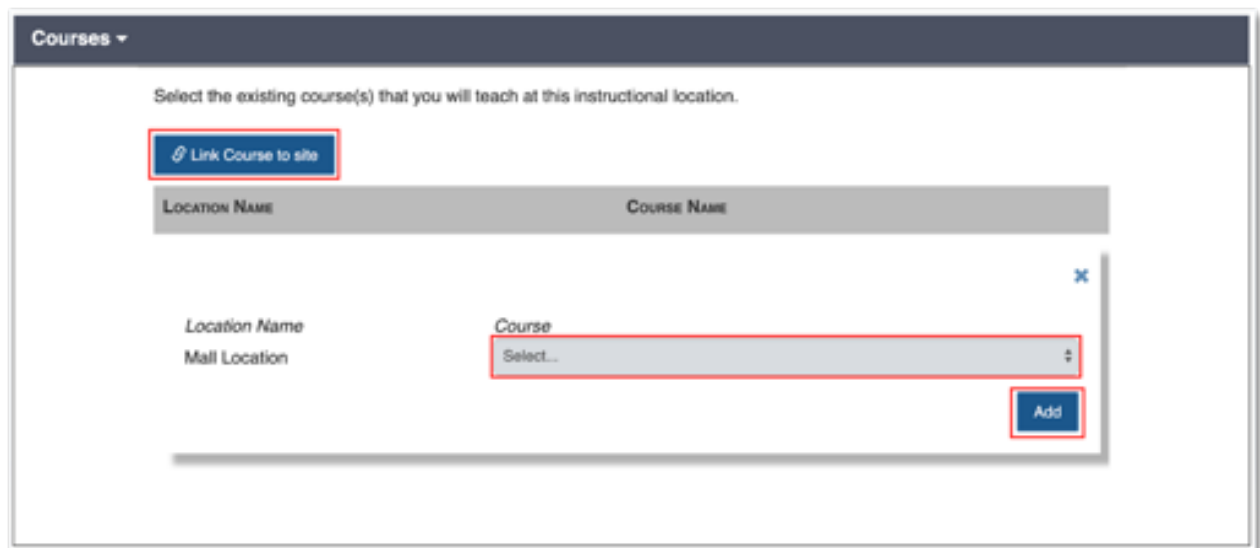

If the Primary Contact is new, they will not appear in the dropdown list. To add a Primary Contact, the user must add a new Personnel. To add the new Personnel, the user can click on the link in under Primary Contact.

2.4.3.4.3 Adding a Course

To add a course, click the Link Course to Site button.

The Course section will expand, allowing the user to select a course from a drop-down list.

Once the course is selected, the school user will hit **Save**, and the course will successfully attach to the Instructional Location and be listed under **Courses**.

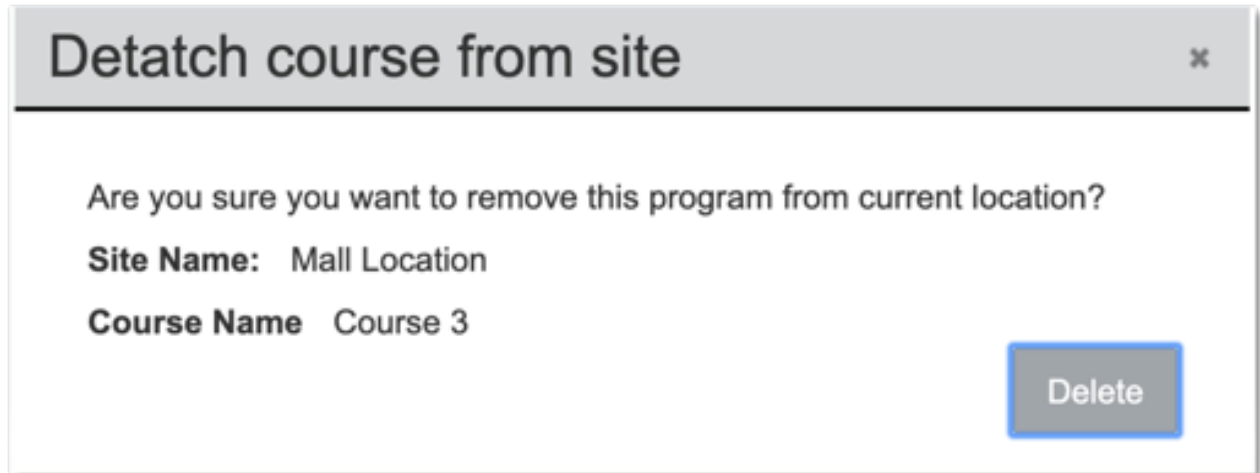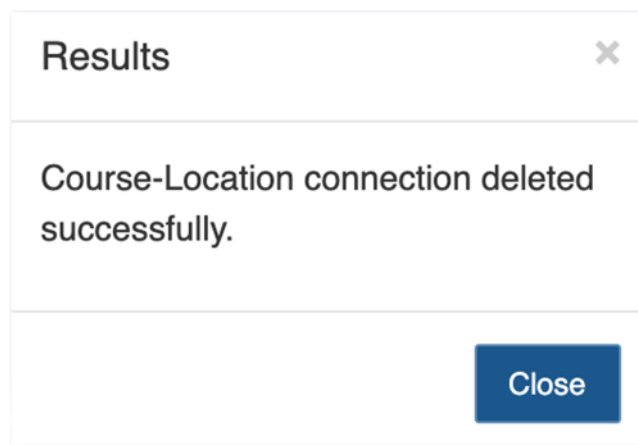### 2.4.3.4.4   *Deleting a Course from a Location*

To delete a course before the Instructional Location has been submitted to SCHEV, the school user will click on the **Delete** link.

Once the user selects Delete a confirmation popup will appear on the screen. If Delete is selected, the course will be removed from the Instructional Location. Note – this does not delete the course.

Once **Delete** is clicked the user will get a successful message on the screen and the Course will be removed from the Course table.

Note - Deleting or Editing a Course modifies the Instructional Location. If a course is Deleted or Modified outside of recertification or between recertification cycles, the user will need to submit each Location Modification to SCHEV. See section **AC 4.0.2 Submitting a Modified Location to SCHEV** for additional details.

2.4.3.4.5   *Editing an Instructional Location*
To edit an Instructional Location before the Instructional Location has been submitted to SCHEV, the school user will click on **Edit**, make any adjustments to the Instructional Location, then click **Save** on the **Modify Location** Screen.

Note: Editing an Instructional Location outside of recertification will follow the same process, however, after recertification users will have to submit each Instructional Location change to SCHEV for review. See section AC 4.0.2 Submitting a Modified Location to SCHEV for additional details.

2.4.3.4.6 Deleting an Instructional Location

To delete an Instructional Location before the Instructional Location has been submitted to SCHEV, the school user will click on the Report Closure link.

Once Report Closure has been selected a confirmation popup will appear on the screen.

After Report Closure is confirmed, the Instructional Location will be removed from the Instructional Location list.

Note: Deleting an Instructional Location outside of recertification will follow the same process, however, after recertification users will have to submit each Instructional Location change to SCHEV for review. See section **AC 4.0.2 Submitting a Modified Location to SCHEV** for additional details.

2.4.3.5 Financial Section
The financial section is part of initial certification as well as recertification.

2.4.3.5.1 Projected Budget
During initial certification, every school will have to fill out a Projected Budget. The school user is able to type in amounts, formatting will be applied, and the user can tab or use their mouse to navigate between input lines.

However, depending on the school type (existing, new, in-state, out-of-state, etc.), the user will see either a Financial Statement Upload section and listed surety requirements, Surety Requirement, or Financial Statement Upload and Surety Instrument calculator. A breakdown is below:
- Out-of-State Existing Schools (Degree and Non-Degree) - Financial Statement Upload and Surety Requirement Amount
- New to SCHEV Non-Degree - Financial Statement Upload and Surety Instrument Calculator
- New School in State (Degree and Non-Degree) - Surety Requirement

2.4.3.5.2 Surety Instrument Calculator
Depending on the type of school, the user needs to fill out the Surety Instrument Calculator during initial certification and when the Surety is needing to be renewed.

The user would input values and the system would calculate the Total Surety Required.

Surety Instrument Calculator ▾

Projected Enrollment (max no. per term)		$ Tuition/Fees (per student)		Total Student Tuition/Fess
50	X	$ 15,000.00	=	$ 750,000.00

No. Students with Scholarships		$ Scholarship (average amount)		Total Scholarship
5	X	$ 10,000.00	=	$ 50,000.00

Students paying partial tuition		$ Tuition per student		No. of Partial Payments		Total partial payment liability
7	X	$ 15,000.00	+	4	=	$ 26,250.00

Total Student Fees		Total Scholarship		Total partial payment liability		Total Surety Required
$ 750,000.00	-	$ 50,000.00	-	$ 26,250.00	=	$ 673,750.00

2.4.3.5.3   Surety Waiver

Some schools may be eligible to apply for a surety waiver. To apply for the waiver, the school would simply need to select and submit the decision to SCHEV.

Note - The SCHEV financial user could reject the waiver and the school user would need to come back and fill out the **Surety Instrument Calculator** and fill in **Surety Instrument** information.

Surety Waiver ▾

Your school is eligible to apply for a surety waiver. Do you want to apply at this time?
- ● Yes
- ○ No

Surety Instruments ◂

Please carefully review your submission before clicking the Submit to SCHEV button. Once you submit this information, you will not be able to make any changes or edits unless asked to do so by SCHEV. SCHEV has 30 days to review your submission and provide a response.

[Back to Summary Page]   [Save]   [Submit to SCHEV]

2.4.3.6 Supporting Documentation

During Initial Certification and Recertification, the user will need to upload or update the appropriate supporting documents.

Quick Links

Downloadable Instructions

Expand All

Advertising Material ▾

Provide sample advertisement, announcement, or other promotional material that includes:

- A statement that the Council has provisionally certified the institution to operate in Virginia
- The institution's complete name as approved by SCHEV
- The address of the school's Virginia site

Refer to sample advertisement for guidance.

Upload | Only PDF files allowed. Once uploaded, files(s) will appear here.

Authorization certificate(s) ▾   1 file(s) attached

Provide copies of the following:

- State Corporation Commission Certificate, if incorporated
- Certificate of Assumed or Fictitious Name(obtained from the circuit court clerk's office)
- Current Business License(from the Virginia locality within which the institution will operate)
- Proof of State Authorization from home state (if applicable)
- Evidence the institution is operating in good standing in its home state
- Evidence the institution closed in good standing if it ever operated in another state

Upload | Approved Financials (2MB)   View | Delete

Curriculum ◀

Distance Education Attestation (if applicable) ◀

Enrollment Agreement ◀

Internship, Externship or Production Work Policy (if applicable) ◀

Library Resources Plan ◀

Powers, Duties and Responsibilities Policy ◀

Recruitment and Admissions Policy ◀

School Catalog & Checklist ◀

Status of Good Standing Report ◀

Student Handbook (if applicable) ◀

Telecommunications/Distance Education Policy (if applicable) ◀

Truth-in-Lending Agreement (if applicable) ◀

Back to Summary Page

The school will be required to upload all documents unless the section is labeled, (if applicable).

To upload the document, the user will select **Upload** and select the appropriate PDF document file. Once uploaded, the file name will appear, a save message will appear on the screen, and the total number of attached files(s) will appear at the top of the accordion.
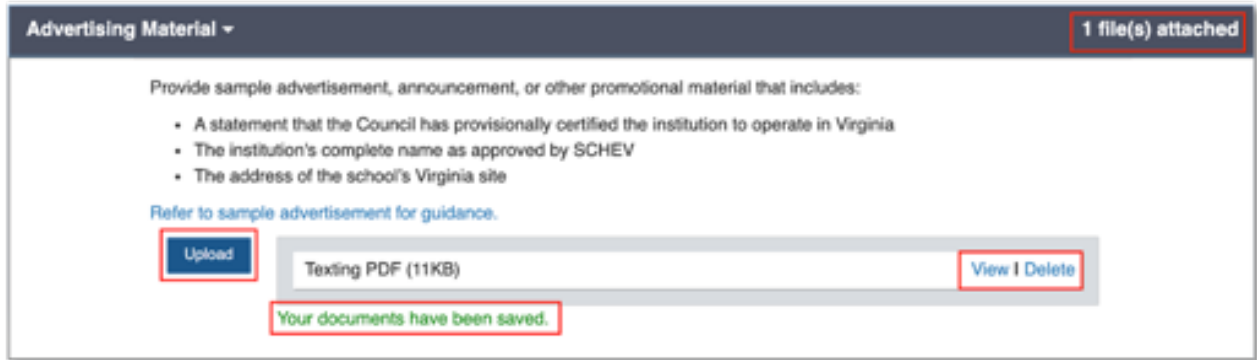
The user is able to view or delete the uploaded document by clicking on **View** or **Delete**.

2.4.3.6.1   Catalog Checklist in Supporting Documents

In the Supporting Documents section, the user is required to fill out and upload a Catalog Checklist. To fill out the Catalog Checklist, the user will select **Click here to complete the checklist**.
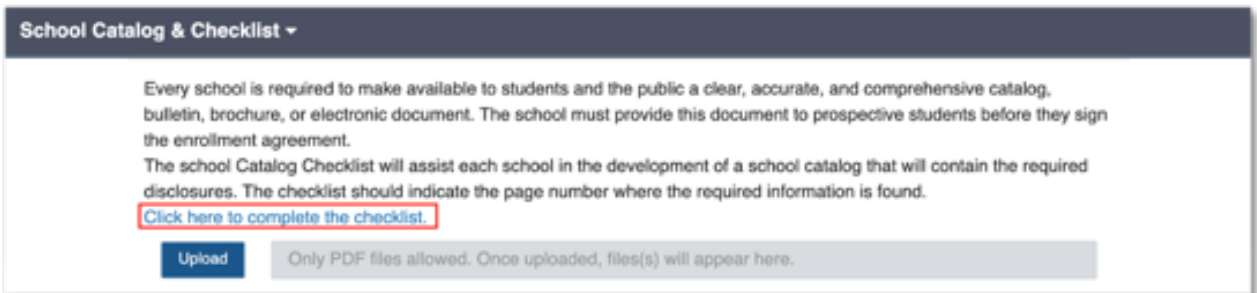
Once the link is selected, the Catalog Checklist will appear on screen. The user is able to enter the page number in the Catalog Checklist and save entered information.

Catalog Checklist   ×

In Virginia, each postsecondary school is required to provide or make available to students, prospective students, and other interested persons a clear, accurate, and comprehensive Catalog, Bulletin, Brochure, or Electronic Media. The school must provide a Catalog, Bulletin, Brochure, or Electronic Media with all of the required disclosures before the prospective student signs the enrollment agreement.

The information provided within School Catalog Checklist is to assist persons who will create a new Catalog, Bulletin, Brochure, or Electronic Media. It is of necessity abbreviated at times. If there is any conflict between any language within this School Catalog Checklist and the Code of Virginia or the Virginia Administrative Code (rules), then the rules will prevail.

The following School Catalog Checklist will assist each postsecondary school in the development of a school catalog, bulletin, brochure, or electronic media that will contain the required disclosures. All postsecondary schools must submit a school catalog accompanied by a completed checklist indicating the page number where the required information is found.

While the items below must be included in the catalog, institutions may use their discretion to include additional items they feel are relevant to their own institutions.

References to the Virginia Administrative Code have been provided for ease of reference to the requirements. Please DO NOT use these references in the catalog. Required Information for all Catalogs, Bulletins,   ?

REQUIRED INFORMATION FOR ALL CATALOGS, BULLETINS, BROCHURES, AND ELECTRONIC MEDIA

8VAC40-31-30 (A)	Page
A school certified to operate by SCHEV must include in any print and electronic catalogs: • A clear statement that the State Council of Higher Education for Virginia has certified the school to operate in Virginia, and • The complete address of the main campus and all branch locations within Virginia	

8VAC40-31-30 (C)	Page
A school with its main campus not located in Virginia must state in the print and electronic catalog distributed in Virginia that: • Each course, diploma, or certificate program offered in Virginia is approved by the governing body of	

2.4.3.7 Certification/Recertification Checklist

During Initial Certification and Recertification, the School user will need to fill out the certification checklist by clicking "**Yes**" to signify standards are met, select "**No**" to signify standards are not met. If standards are not met, the school will use the text box on the left to state why standards are not met.

Name of Institution	Triangle Piedmont Regional University - Richmond Campus

Name of President/CEO

Read and understand the regulation references before attesting to whether or not the school meets standard. Compliance with the regulation references below will be verified when an audit is conducted. Pursuant to 8VAC 40-31-200(D)(1-3), findings of non-compliance can lead to conditional certification, suspension or revocation of the school's certificate to operate.

REGULATION REFERENCE	MEETS STANDARD	REMARKS (PROVIDE EXPLANATION FOR NOT MEETING STANDARD)
Administrator Credentials 8 VAC 40-31-150 E	● Yes ○ No	
Admissions Policy 8 VAC 40-31-160 D	○ Yes ○ No	
Advertising Requirements 8 VAC 40-31-30 A-D	○ Yes ○ No	

Once the check list is completed, the school user will click, **Download to Sign/Attest**. The School user will sign the document, then upload the attested document.

2.4.3.8 Enrollment/Graduation Data

During **Recertification**, the school will be required to enter Enrollment/Graduation Data. The school user will be able to view previous data from the Recertification Summary screen.

Enrollment/Graduation Data

By Category:	196
By program:	0
Total graduated:	0
Placement within 6 months:	0
Placement within 12 months:	0

Start by Category

Start by Program

To begin working on the Enrollment/Graduation Data section of the Recertification Application, the user will click **Start by Category** or **Start by Program**.

2.4.3.8.1   Enrollment/Graduation Data by Category

While in the Enrollment Information Section it is important to note that the only Category type(s) that will appear is based on what Credentials the school offers (currently under the **Programs/Course** section). For example, if the school only offers Diplomas, the only Category type will be Diplomas**.**

To add or update Enrollment Information the user will click either **Edit** or **Add**.
Note - Add will only appear if the Category is new.
Note - any updates added, edited, or deleted enrollment information will automatically update the Enrollment Information page and the Recertification Summary page.
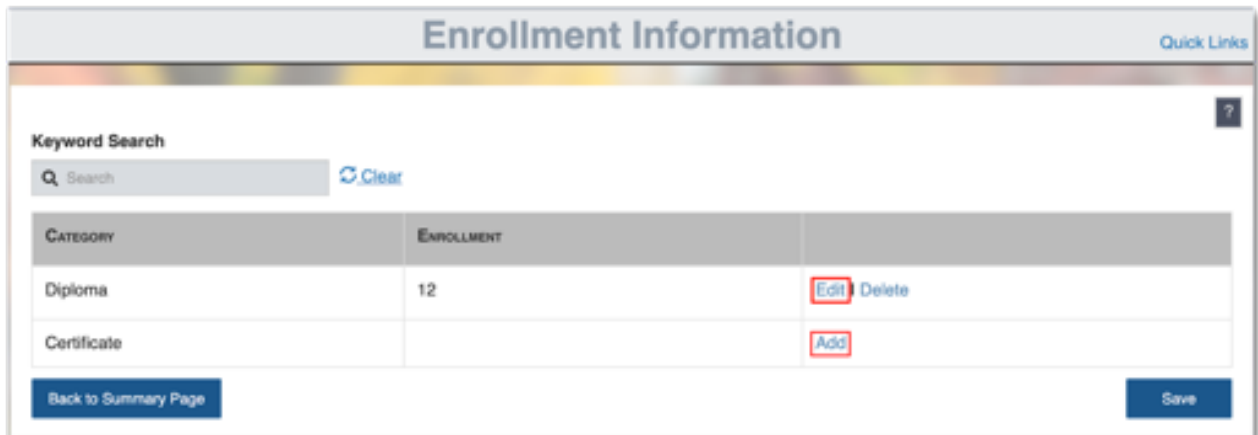
2.4.3.8.2   Adding/Editing Enrollment Information by Category

After the user selects Edit, they will be taken to the Enrollment Information page by Category where they can Add New Enrollment Category, Edit existing Enrollment Category, or Delete existing Enrollment Category.
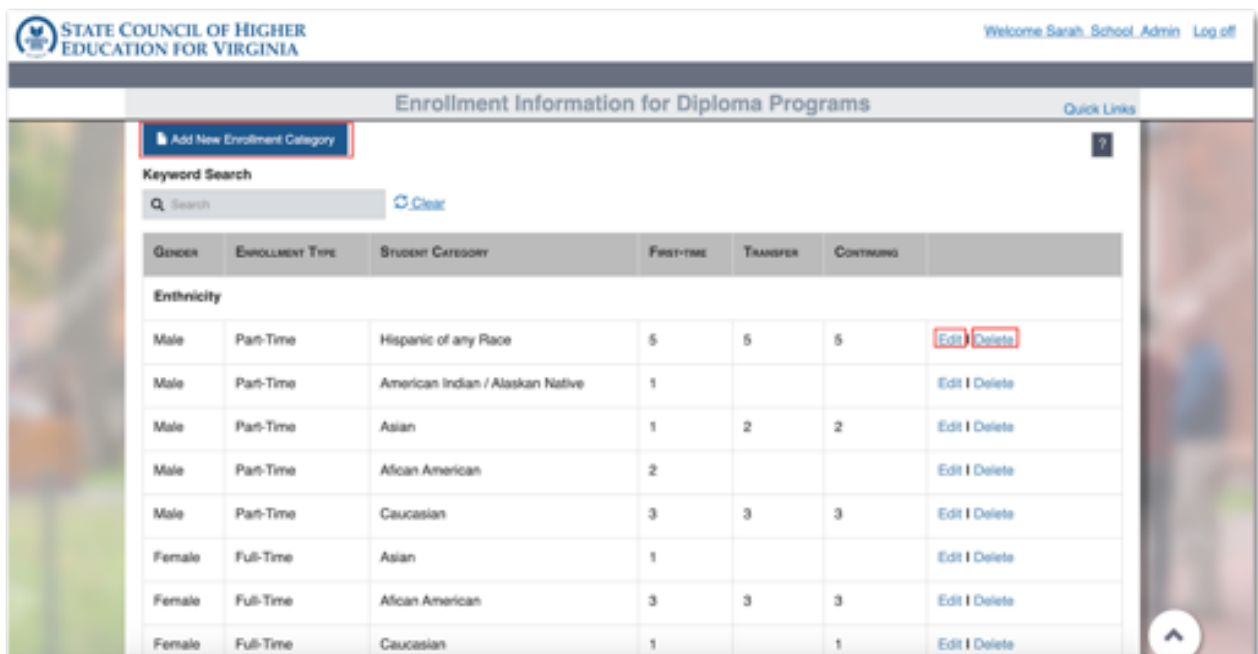
2.4.3.8.3   Adding Enrollment Information by Category

If the user clicks Add New Enrollment Category, a popup will appear on the screen. The user is able to use the radio buttons to select Gender and Enrollment type. As the user is selecting from the top options (Gender and Enrollment type), the application will populate data that was previously inputted.

Add New Enrollment Information

Select both Gender and Enrollment Type before entering enrollment data for any category

Select Gender
- ● Male
- ○ Female

Select Enrollment Type
- ○ Full-Time
- ● Part-Time

Enthnicity	FIRST-TIME	TRANSFER	CONTINUING
Non-Resident Alien			
Race/Ethnicity Unknown			
Hispanic of any Race	5	5	5
American Indian / Alaskan Native	1		
Asian	1	2	2
Afican American	2		
Native Hawaiin / Pacific Islander			

The user can add new or edit existing enrollment data. As the user is adding or editing data, the application will automatically total enrollment information.

Once the user is done adding or editing existing information, the user will select **Save** to save the changes.

2.4.3.8.4   Editing Enrollment Information by Category
The user is able to edit existing enrollment information by selecting **Edit**. Once **Edit** is selected, input boxes will appear on the screen. The user can select **Cancel** to close the edit boxes, select **Delete** to delete enrollment information, or add/edit data, then hit **Save** to save changes.

Gender	Enrollment Type	Student Category	First-time	Transfer	Continuing	
Enthnicity						
Male	Part-Time	Hispanic of any Race	8	5	5	Cancel	Delete

First-time	Transfers	Continuing
8	5	5

Save

2.4.3.8.5 Deleting Enrollment Information by Category

The user is able to delete enrollment information by selecting Delete. If the user selects Delete, a popup message will appear on the screen asking for deletion confirmation.

Remove Enrollment Category from Certification ✕

Are you sure you want to delete Enrollment data for Full-Time, Race/Ethnicity Unknown, Male students?

Delete

2.4.3.8.6 Enrollment Information by Program

Once on the Enrollment Information by Program page, the user will be able to enter enrollment data by Program. Note - the application will automatically pull existing and new program information to this screen.

Enrollment Information   Quick Links

Certification Year	Program Name	6 Month Placement Count	12 Month Placement Count	Graducation Count	Enrollment Count
2019	Structural Engineering	5	12	20	25
2019	Building - Entry Level	10	10	10	10
2019	Building - Intermediate Level				
2019	Building - Senior Level				
2019	LPN				
2019	CNA				
2019	Nursing				

Back to Summary Page   Save

The user will fill out all enrollment information then select **Save** to save all changes. The changes will appear on the **Recertification Summary** screen.

2.4.3.9 Certification/Recertification Summary

During initial certification, the Summary will show a summary of the certification application with appropriate Certification Application Fees at the top. If edits to the certification application need to be made at this step, the school user can click **Review/Edit** and the user will be routed to the appropriate page.

During Recertification, the school's information will appear on the Recertification Summary, with the ability to **Review/Edit** information, or mark information as unchanged, by selecting the checkbox.

During Initial Certification and Recertification, the School user can submit the application to SCHEV or Withdraw their application. Withdrawing the application will notify SCHEV that the school wishes to withdraw from the Certification process. SCHEV can either accept or deny the withdrawal.

If the user clicks **Submit to SCHEV**, the user will be redirected to the Checkout screen where the user can review and submit payment. View **Section 4.2.1.1 Checkout Process** for more information. The school user can also select **Mark Ready for Pay** and the Financial Officer will have the ability to pay for the application. Note - the school has not submitted their certification application until the payment has been processed.

2.4.4 Last steps to Initial Certification
RESERVED

2.4.5 CTO/Cover Letter for Approved Recertified Schools
Once the full Recertification application has been approved, the user will receive the CTO and Cover Letter via email.

Ad Hoc Changes (AH)

3.0 Ad Hoc Changes
After a certification application is approved, and before recertification, the school will be able to make Ad Hoc changes to the school. Ad Hoc changes include: **modifying accreditation status, changing location, changing school name, updating primary contact, add new or managing site, add new or manage existing school personnel, add new or manage existing program or course**. Some of the Ad Hoc changes have payments associated with changes or updates.

3.0.1   Viewing the School
To view or start making changes to the school, the school user will click on the *School Name* under **Name** in the **School** tab.

3.0.2   Certification Summary Page

Once the school user is in the school's profile, they will see the Certification Summary Page. To make updates, the school user can either navigate using the left-hand navigation, the buttons on the page that state: **Review/Edit** or click on the **Quick Links** link.

Note – only school admin users are able to Submit to SCHEV.

4.0 Quick Links

The Quick Links section is a collapsible drop-down section that will allow for schools to easily navigate to one page and make a quick update to the school's information.

4.0.1 Adding or Managing Existing Instructional Location

To make an Instructional Location change, the school user will navigate to the **Location Tab**.
The **Location Tab** lists all Instructional Locations associated with that school. Note – to change
location information for a main campus, the school user would go to the **General Information** section
and make updates. To **Add** or **Edit** an Instructional Location, click on the **Add New Location** link or
the **Edit** button for that site

After clicking **Edit**, the application will redirect the school user to the **Edit Location** page. The user
can change either **General Information** related to the site **or Course information** related to the site.

General Information ▾

Instructional Location Name
Mall Location

Street Address
119 W Broad St

City   State   Zip
Richmond   Virginia   ⬍   23220-4214

Phone   Ext   Fax
(804) 575-7575   123   (805) 768-4786

Select Primary Contact
Sarah Jones(Owner)   ⬍

Note: If the contact does not exist in the list above; please create them under 'School Personnel' section here.

Courses ▾

Select the existing course(s) that you will teach at this instructional location.

[🔗 Link Course to site]

LOCATION NAME	COURSE NAME	
Mall Location	Course 1	Delete
Mall Location	Course 2	Delete

Once the change is made, the user clicks save at the bottom of the page and the system will return the user to the Locations page. Note - hitting save does not submit the change to SCHEV users.

4.0.2   Submitting a Modified Location to SCHEV

After the save is changed, the Locations page will look slightly different than before. The location that has been changed will have a badge next to the location's name that says **Modified**.

To submit the change to SCHEV (Modified, New or Deleted), the user will need to select which location they want to submit a change for by selecting the check box to the left of the school name.

Once the check box is selected, the school user will click **Submit to SCHEV** and be directed to the checkout page or **Mark Ready for Pay** and the Financial Officer can pay for the changes. Note - the change will not be fully submitted to SCHEV until payment is approved.

4.0.2.1 Paying for an Ad Hoc Change
Some Ad Hoc changes require payment. Once an item that requires payment is submitted to SCHEV or marked for pay, the school will be redirected to the checkout page.

The School user will enter in payment information and click **Submit**, and a receipt confirmation will be emailed to the school and appear on the screen.

If the school user clicks **Continue**, the application will take the user back to the **Location** screen. The Location tab in the left-hand navigation will be blue to indicate that a change has been submitted to SCHEV for review.

4.0.3   Closing a Site

To report a site closure, the school user would select **Report Closure**.

Once the link is clicked, a popup would appear on the screen. The school user would fill in all required information, sign/upload document then click **Report Closure**.

Note – at this point, the location closure has not been submitted to SCHEV for review. To fully submit the closure, the school user would select the school using the check box, then click **Submit to SCHEV**. For more information, refer to **Section 3.1.2 Submitting a Modified Location to SCHEV**.

4.0.4 Modifying Accreditation Status

After navigating to the **Modify Accreditation Status** section, the school user will be able to make updates to the accreditation status. Once the updates are made, the school user can either click **Save** or **Submit to SCHEV**. Note – Submit to SCHEV is restricted to School Administrator roles.

Once the change is submitted to SCHEV for review, the **General Information** Tab will be blue to indicate that a change has been submitted to SCHEV for review.

4.0.5 Change in Physical Location

After navigating to the **Main Location** section, the school user will be able to update the Main Campus's address. Once the changes are made, the school user can either click **Save** or **Submit to SCHEV**. Note – Submit to SCHEV is restricted to School Administrator roles.
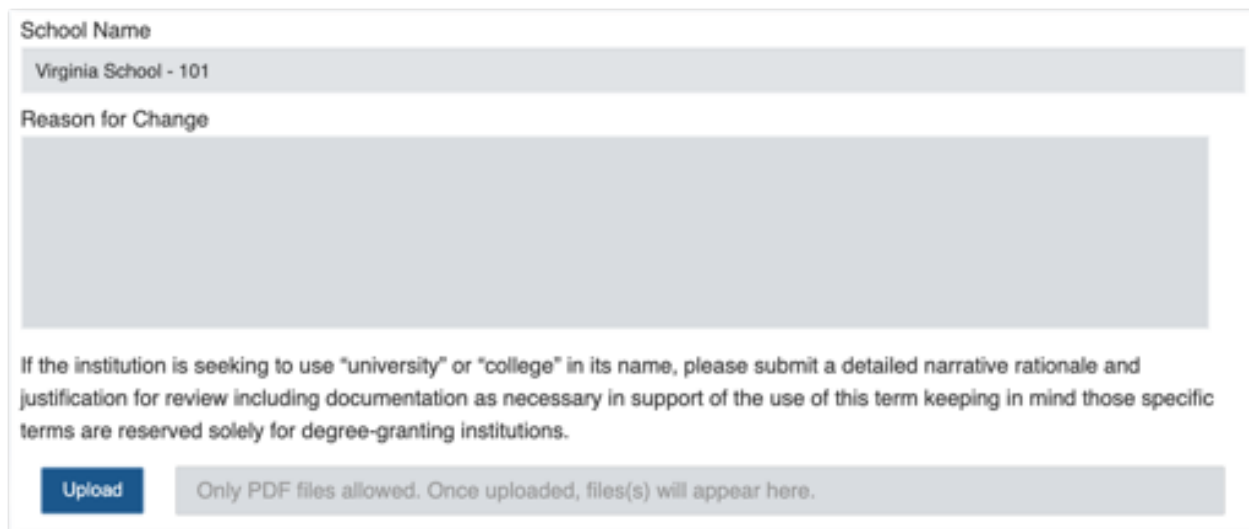
4.0.6   Editing a School Name

After navigating to the **School Name**, the school user can edit the school's name. Once edits are made to the name, the school has the ability to explain reasoning behind the name change and upload supporting documentation

Once the changes are made, the school user can either click **Save** or **Submit to SCHEV**. Note – Submit to SCHEV is restricted to School Administrator roles. If the school user hits **Submit to SCHEV**, the system will direct the school user to the check-out page. See **Section 3.1.2.1 Paying for an Ad Hoc change** for information on the checkout process.

4.0.7   Updating Primary Contact

The school user can update their Primary Contact, choose an existing Personnel to be the Primary Contact or create a new Primary Contact, while on the General Information page. To select a new Primary Contact, the user can choose a Personnel from the drop-down list or the user can select Create New Personnel as Primary Contact.

If a new Primary Contact is chosen, the Primary Contact information will update on the General Information screen.

If the user would like to add a new Personnel as the Primary Contact, the school user would select, "**Create New Personnel as Primary Contact**". Once that is selected, the Primary Contact information on the screen would be cleared out and the school user could type in new information.

To fully add the new Personnel, the user would need to **Save** the General Information page and select the link to change other details for the Primary Contact. By clicking the link, the school user would be redirected to the **Personnel** page to update all necessary information. Once the school user is finished updating, the user would click **Save** or **Submit to SCHEV**.

4.0.8   Adding or Managing New Personnel

To add, edit or delete Personnel, the school user would navigate to the **Personnel** tab. The school user can either add new or edit existing personnel. Refer to **Section 2.4.3.3 School Personnel** for specific information.

4.0.8.1 Submitted Personnel Change to SCHEV

After all the information is added, edited, or deleted, the Personnel that had been updated would have a badge next to their name(New, Modified, Deleted). Once the school user was ready to submit the new, edited, or deleted personnel to SCHEV, they would select the Personnel by selecting a checkbox, then **hit Submit to SCHEV** or **Mark Ready for Pay**. Note - the change will not be fully submitted to SCHEV until payment is approved.

4.0.9   Adding or Managing Programs

To add, edit or delete a program, the school user would navigate to the **Program & Courses** Tab. The **Program & Courses** Tab will list all programs associated with that school. To add, edit, or delete a program, click on the **Add New Program** button or the **Edit** or **Delete** link for that program.

After clicking **Edit**, the application will take the school user to the **Edit Program** page. The user can change either **General Information** related to the program, **Hours & Cost**, add/edit **Supporting Document**, **Courses,** update **Standard Occupational Classification** related to the program, and update **Faculty Requirements**.

Once the school user makes all updates, they would click **Save.** After hitting **Save**, the application will let the user know that the program was edited successfully, and it will take the user back to the **Program** page.

4.0.9.1 *Submitting Program Change to SCHEV*

The Program that has been changed will have a badge next to the item's name. The badge will either say, New, Modified, or Closed. The school will have to select which item they want to submit a change for by selecting the check box to the left of the school name. Once the item is selected, the user will need to click **Submit to SCHEV** or **Mark Ready for Pay** to fully submit the change. Note - the change will not be fully submitted to SCHEV until payment is approved.