Job Aid: Creating a Course Record as a CR Administrator

User Role: Course Record Administration

Core Concepts

What is the course record system?

The course record system allows you to enter course records for American Red Cross training. Once you have entered all of the required information, you submit it to your chapter for review and approval.

Do I have to enter student information into the course record?

There are some Red Cross courses that do not require the collection of student names (e.g., swimming lesson courses and education presentations). If the course you taught does not require student names, you can check the **Skip Student Details** checkbox. You do not enter the names or contact information of the students. Instead, you enter the total number of students, the number who completed the offering successfully, the number who did not successfully complete it, and the number who were not evaluated. If the **Skip Student Details** box does not appear, then you must enter student information for the course record.

What payment options are there for the course offering?

If the course record you are entering requires the payment of fees, the total cost will be automatically calculated. This total must be paid for in full by credit card or purchase order. To use the purchase order payment method, a purchase order for the organization submitting the course record must be set up in the system by the American Red Cross, and it must have sufficient value to cover the course's cost.

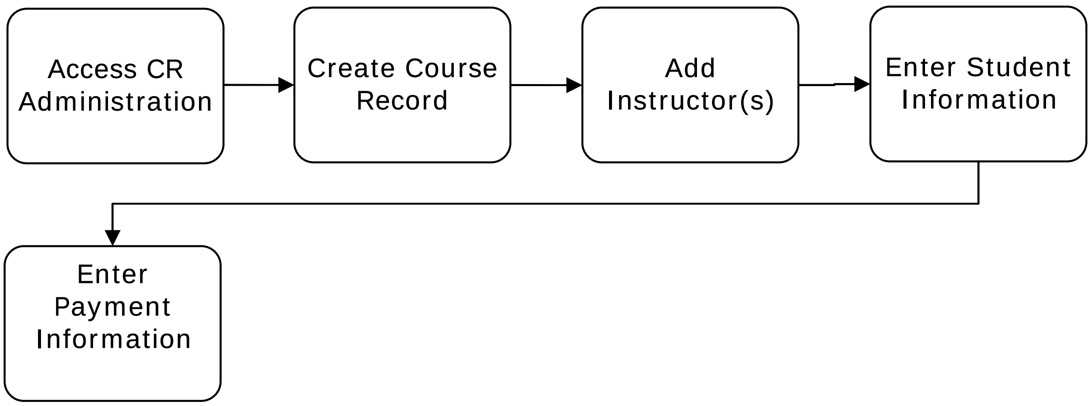
What happens after I submit the course record?

The course record is submitted in the system to the chapter for review, and you receive an email confirmation of the submission. The chapter administrator will approve the course record, contact you regarding needed changes, or reject it. Once approved, you will receive an email informing you that the certificates are ready for printing. If the course record is rejected, you will need to make any needed corrections and resubmit the course record.

➲ *Note: Once you submit a course record to the chapter for review you cannot edit it. If you need to make corrections, contact your local chapter.*

Process

Process flow



Process steps

Step	Action
1. Access CR Administration	• From the drop-down menu at the top, select **CR Administration**.
2. Create Course Record Sheet	• Click the **New Course Record** link. ➲ *Note: If you want to search for an existing course record – such as one that has already been submitted to the local chapter for review, enter the search criteria and click search. Use the **%** as a wildcard for searching.* • Complete the following fields: o **Contact** – the contact field auto populates with your information. The contact on a course record is the person who will receive notifications about the status of the course record, and the contact will be able to print certificates once the course record is approved. o **Organization**: Select the organization for which the course was offered from the drop-down menu. ➲ *Note: Only organizations with which you are associated will appear in the drop-down menu.* ➲ *Note: The organization name will appear on student completion certificates.* o **Course**: Click the **Pick Course** button to the

Step	Action
	right of the field to search and select the course that was offered. ➲ *Note: Use the **%** as a wildcard for searching.* o **Offering End Date**: Click the **Offering End Date** icon and select the end date of the course's offering. ➲ *Note: This is the date that will appear on the learners' completion certificates.* o **Skip Student Details** (optional): Check this box if you want to enter the total number of students who attended and were successful, unsuccessful, or not evaluated, instead of entering information about each student by name. ➲ *Note: The **Skip Student Details** field only displays if the course is set up to allow anonymous learners.* o **Total Students**: Enter the number of students who attended this offering of the course. o **Total Successful:** Enter the total number of students who successfully completed the offering. o **Total Unsuccessful:** Enter the total number of students who did not successfully complete the offering. o **Total Not Evaluated**: Enter the total number of students who were not evaluated as successful or unsuccessful. ➲ *Note: The **Total Successful**, **Total Unsuccessful**, and **Total Not Evaluated** fields only display if you check the **Skip Student Details** checkbox.* ➲ *Note: The sum of the numbers in the **Total Successful**, **Total Unsuccessful**, and **Total Not Evaluated** fields must equal the number entered into the **Total Students** field.* o **Street Address**: Enter the street address of the facility where the offering was conducted. o **City**: Enter the city where the offering was conducted. o **State**: Enter the state where the offering was conducted. o **Zip**: Enter the zip code where the offering was conducted. o **County**:* Select the county where the offering was conducted from the drop-down list.

Step	Action
	o **Certificates** (optional): Select the option for how you would like to distribute certificates from the drop-down list. ➲ *Note: Requesting that certificates be printed by the local chapter and sent to the customer may involve additional fees.* o **Comments** (optional): Enter any additional information about the course offering that you would like the local unit to know, if needed. • Click the **Save** button. The course record is saved and the **Instructors** section appears.
3. Add Instructor(s)	• In the **Instructors** section, click the **Add Instructor** link. A window displays to search for instructors. • Enter search criteria to locate the desired instructor. ➲ *Note: Use the **%** as a wildcard for searching.* • Click the **Search** button. ➲ *Note: Only people who are associated with the course record's organization and who are designated as an instructor resource will display in the search results.* • Check the checkbox next to any desired instructor(s). • Click the **Select and Close** button. • Click the **Next** button. ➲ *Note: If you need to add additional instructors after clicking the **Select and Close** button, repeat the Add Instructor(s) steps above.*
4. Enter Student Information	➲ *Note: If you checked the **Skip Student Details** checkbox in step 2 above, then skip this step and go to step 5 below.* ➲ *Note: There is a column for every course component associated with the course.* • For each learner, complete the following fields: ➲ *Note: First and last name are required. Email and phone are preferred to help locate student records in the future.* o **First Name**: Enter the learner's first name. o **Last Name**: Enter the learner's last name. o **Email**:* Enter the learner's email address. o **Phone**:* Enter the learner's phone number. o For each course component field, select **Successful**, **Unsuccessful**, or **Not Evaluated** from the drop-down list. ➲ *Note: **Successful** is the default value.* • Click the **Review** button.

Step	Action
	➲ *Note: Reviewing the student information is a mandatory step before you can proceed. If you need to make changes, click the **Back** button and edit the information.* ➲ *Note: A careful review is important to ensure that learner names are spelled correctly and that the appropriate completion status(es) is recorded for each learner.* • Review the information for accuracy and click the **Confirm** button.
5. Enter Payment Information	• In the **Payment Type** field, select the proper payment type. Additional fields display. • Complete the additional payment fields, which vary according to the selected payment type. ➲ *Note: In order for a purchase order to be used for payment, it must be associated with the organization listed on the course record and have sufficient value to cover the **Total**.* • Check the **I Agree** checkbox to certify that the training session has been completed in accordance with the requirements and procedures of American Red Cross. • Click the **Submit** button. A message window displays to confirm that submitting the course record sheet will send it to the chapter for review. ➲ *Note: You cannot edit a course record once it is submitted to the local chapter for review. If you need to make changes to a course record you have submitted, contact your local chapter.* • Click the **OK** button. The course record sheet is submitted for review by the chapter administrator. • To print a summary of the course record, click the **Print Summary** button and click the **Print** button in the window that displays. ➲ *Note: The summary page serves as the official course record. This record is the equivalent to the Course Record and Course Record Addendum or an Activity Sheet.* ➲ *Note: You do not need to submit a paper copy of the course record to the local chapter if you have entered the course record in the system.*

Footnote:
* Even though this is not a required field to save this record in American Red Cross Learning, it is important to complete it for reporting and data purposes.