**qwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmrtyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmrtyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmrtyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmrtyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmrtyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmrtyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmrtyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnmqwertyuiopasdfghjklzxcvbnm**

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# Book Orders

1. Do a physical count of the books on hand in the cabinet and mark them on the book order sheet
2. Go through the Student Outline book for each and every student and indicate on the book order sheet the next two books that EACH student will need
3. Obviously, for those with counts less than what is needed, books will need to be ordered
4. Mark the date on the count sheet, hole punch it, and put it in the front of the Student Outlines binder
5. Open the order form from **F:/Admin/Rose/Forms/RICOH Book Order** - this will need to be updated on the first of each month due to pricing changes, obsolescence, etc.
6. Fill out the form, and save it in **F:/Admin/Rose/Book Orders/2013** with the date of the order. Email the form to Dragan

***NOTE:*** Try to keep extra copies of Word, Excel, Outlook, and Keyboarding books on hand as these could potentially be walk-in students that will need these books right away   
  
When the book orders come in, check the quantities against the packing list and confirm that everything was received. If there are any problems, email aolcsr@ricoh.ca and let them know about it. There is no need to keep the packing list or waybill once the order is put away.

# Configuring Typing Trainer

1. Launch Typing Trainer from the desktop
2. Username: Administrator (case sensitive), password: **AOLType23**
3. Click **Create User**
4. Username is the contract number (with *bc* or *bcs*)
5. Password is first name plus contract number (**without** *bc* or *bcs*)
6. Click **Add Course** and select the appropriate course
7. If taking *Intro to Keyboarding*, fill out Page 9 of the book with the username and password as configured

# Contract Changes

1. Fax the changes (1st page of the contract) to Dragan (speed dial #9), and also to Head Office
2. Make the necessary changes in CMS
3. Attach the changed info to the student's page in the Student Outline book

# Building a New File

1. Ensure the file has the following documents:

* ‘File Checklist’ stapled to the left side of the file with a photocopy of student’s ID
* ‘Monthly Reports’ stapled to the right side of the file
* Signed Contract with Appendix B and Appendix A (if contract is more than $1000) and Sponsorship Letter if necessary
* Student Data Sheet with outline stapled inside

2. Go through the file checklist and initial and date all applicable items. Keep a running list of all items the file is missing.

3. Make 2 copies of Contract (only first 2 pages for individual programs and first 3 pages for full programs). One copy goes to head office. The other copy goes to Dragan, along with the sponsorship letter if necessary.

4. If student is sponsored, create a file for Monthly Reports in the appropriate folder.

5. Add student to CMS. Make sure to include Sponsorship Information under Notes if necessary and Emergency Contact Information. Also be sure to enter student’s full name on Person Tab.

6. Add student to the following files:

* Weekly Attendance
* Current Students on Current Students tab and current Monthly Meetings tab

7. Add student to the server.

8. Assign books to new student and add student files to their server folder.

9. Leave books with Orientation Sheet, Student Record and Student Data Instructions in the designated spot for new starts. Create these documents as needed.

10. Add a copy of the Student Record in the assigned binder.

# Order of Student Files

1. File Checklist and ID stapled on left inside cover
2. Contract – Appendix B, Appendix A and/or sponsorship letter if necessary stapled on inside.
3. Student Datasheet with outline stapled inside
4. Student Orientation Package Stapled:
   1. Student Orientation
   2. Acknowledgement
   3. Internet Usage Policy
   4. Attendance Agreement/Authorization to Release Information
   5. Campus Orientation
5. Payments (paper clipped)
6. Progress Reports/Attendance (paper clipped)
7. Exams (paper clipped or banded together)
8. Correspondence (paper clipped)
9. Monthly Meetings stapled on right inside cover

# Carson Dunlop Outline

1. Roofing (3)

Steep Roofing

Steep Roof Flashing

Flat Roof

2. Structure (4)

Footings & Foundations

Floors

Wall Systems

Roof Framing

3. Electrical (3)

Service Drop

Service Box

Distribution System

4. Heating I (3)

Furnaces Part I

Furnaces Part II

Hot Water Boilers

5. Heating II (3)

Chimneys

Wood

Steam

Electric

Wall & Floor Furnaces

6. Air Conditioning (2)

Air Conditioning

Heat Pumps

7. Plumbing (4)

Supply Plumbing

Water Heaters

Drain, Waste and Vent Plumbing

Fixtures and Faucets

8. Exterior (4)

Architectural Styles

Exterior Cladding

Exterior Structures

Surface Water Control

9. Interior & Insulation (3)

Insulation & Ventilation

Interiors Part I

Interiors Part II

10. Communication & Professional Practice (2)

Communication

Professional Practice

11. Building Your Home Inspection Business (2)

Marketing Concepts and Practice

Advertising, Public Relations, and Sales

# Month End Procedure

1. The reporting sheet for the monthly progress reports are stored at: **F:/Admin/Rose/Student Reports/2013/{month}**
2. These are for FUNDED students only
3. Get the information from CMS on each listed student, and create a sheet with their exam results from the previous month (this should be done after each exam is completed, as it will save having to determine the information for a large number of students at the end of the month)
4. This sheet will only ever show status as **ON TRACK** or **BEHIND {x} BOOKS** (never indicate that a student is ahead)
5. Update the MONTHLY MEETINGS spreadsheet in **F:/Admin/Rose/Student Reports**
   * Students in RED are behind (indicate the number of books, calculated from the student's outline page)
   * Students in GREEN are part-time HCA students
   * Update options as either **ON TRACK**, **PAST END DATE**, or **BEHIND {x} BOOKS**
6. Copy the whole sheet (in appropriate sections) to the new month's tab
7. DO NOT COPY ANY COMPLETED STUDENTS
8. Check to see if any students are past their end date, and change text to RED if they are
9. Transfer completed info to the **Completed/Withdrawn** tab as the file is closed
10. Filter students by end date, and copy any due to finish in the upcoming month to the **Completed/Withdrawn** tab
11. Save the spreadsheet and email it to the Langley and Abbotsford **admissions** addresses
12. During the last week of the month, generate an Attendance Report for each student from CMS: (Reports -> Students)
13. Clip together with the exam results, and give to Alda to review
14. Once returned, fax to the case managers INDIVIDUALLY (WorkSafe BC uses the same fax number for all case managers, but the incoming fax server scans for the case number, and will route the fax to the appropriate case manager based on this number)
15. Stamp when faxed (with the fax control number)
16. File in each individual student's file

# Closing a File

1. On the Student file checklist, do the following:

* Ensure that the payment information recorded in the file matches the information recorded in CMS
* Staff initials and dates (or N/A) appear down the entire checklist
  + Under Progress and Correspondence, check off and initial all three boxes to confirm the file contains progress reports
  + If the student has completed their program, write N/A in all four boxes under Withdrawals.
  + After Certificate(s) or Diploma has been requested initial appropriate box.
  + Once Student called to pick up Certificate(s) or Diploma initial appropriate box.
  + Once closed in CMS initial appropriate box.

2. Complete a ***T220A*** for students who are Self Paid, on Student Loans or funded by Service Canada.

3. Close off file in CMS:

* On the Main Tab: change status from Active to Inactive.
* On the Program/Contract Tab: Change the Date Finished to the student’s last day of attendance. And change the Status to the appropriate status.

4. Send Ros an email to request the student’s Certificate(s) or Diploma. The email should include the student’s:

* Name (as per Exit Interview Checklist)
* Contract Number
* Program Name or Individual Courses

5. Create the student’s ***Transcript***.

6. Create a ***Director’s Letter*** for students enrolled in a full program.

7. Once the Certificate(s) or Diploma comes in from Head Office, ensure it gets signed by Scot or Alda and make a copy of it.

8. Place the original copies of the Transcript, T220A, Director Letter and Certificate(s) or Diploma in an envelope for the student and call them for pick up.

9. Print Student Attendance

10. For Sponsored Students: fax a copy of the student’s Transcript, and Certificate(s) or Diploma to the Sponsorship agency.

11. Scan a copy of the student’s Transcript and Certificate(s) or Diploma in the following order:

* 1. Transcript
  2. Certificate(s) or Diploma (this includes CMAP for MOA students)
  3. Student Enrolment Contract (only signed pages)

Move scanned documents to appropriate location on your computer.

12. For contracts worth over $1000, upload scanned documents to ***Data Witness***.

13. To physically close a file:

* Ensure the file is in the following order:
  1. Copy of Student Transcript and Certificates. For students enrolled in a full program create and attach a copy of a Director Letter to the transcript.
  2. Exit interview checklist stapled to student’s signed Acknowledgement of Release of Information.
  3. Student Enrollment Contract. Appendix B, Appendix A and/or sponsorship letter if necessary stapled on inside.
  4. Student Personal Datasheet.
  5. Student Orientation Package
  6. If the student is enrolled in a program: Entrance Evaluation and Typing Assessment, paper clipped together.
  7. Payment information with T2202A stapled if necessary.
  8. Progress Reports and Attendance sorted and clipped together chronologically. For non-sponsored students, attendance must be printed as there will be no progress reports.
  9. Student Exams.

14. For students that have completed a full program, add the student and program information to the Graduates spreadsheet.

15. File the complete file in the designated filing cabinets under the year that matches the student file folder.

# Closing Files (Detailed)

* On the Student File Checklist, please ensure the following:
  + Payment information recorded on the Student File Checklist **matches** the information recorded in the CMS
  + Staff initials and dates (or N/A) appear down the entire checklist
  + Generally the Director of Admissions will sign the **Documents** and **Signed Student Acknowledgement of** sections
  + Under the **Progress and correspondence** section, check off the three items and write: “See file for reports and documentation” after ensuring that the Progress reports (sorted in chronological order) and Student Record are clipped together and is in the student’s file
  + If the student is on a student loan, ensure that the Director of Admissions initialed and dated the **Appendix 3 on file** **and** the **Negotiated documents** boxes.
    - Check the file to ensure that a copy of the Appendix 3 is located behind the Entrance exam
    - If the latter is not initialed or dated, check the file to ensure copies of the Canada Student loan document and Confirmation of Enrolments forms are clipped together, and initial the **Negotiated document** box and use the date on the Canada Student Loan document
  + If the student has completed their program, write **N/A** in all four boxes under **Withdrawals**
* The following needs to be done to physically close the file:
  + At the top of file there should be a copy of a completed Exit Interview checklist and the student’s acknowledgement of release of information form signed and dated by the student. Please ensure that these two documents are stapled together
  + If the student has a student loan, there should also be a copy of the *Student Personal Loan Repayment Information* package and *Student Loan Information and Review* package. Please ensure these two packages are stapled together and placed behind the Appendix 3
  + The next document behind the Exit Interview checklist is the Student Enrolment Contract.
    - If the student was sponsored (WorkSafe BC, Healthcare Benefit Trust, Private Insurance, corporate, etc.) please ensure that either the sponsorship letter is attached to the contract.
    - If the student has a student loan, funded by Service Canada is self paid with a payment plan, ensure that a copy of one of the following documents is attached to the Notification of Assessment (student loans), Service Canada payment schedule, or Credit Card authorization form filled out and signed by the student
    - If the student is self paid and does not have a payment plan, please ensure that the schedule of their payment is written on their contract
  + The third document behind the Student Enrolment Contract is the *Student Personal Datasheet*
  + If the student is enrolled in a certificate or diploma program, behind the Student Personal Datasheet is the *Entrance Evaluation* and a typing assessment paper clipped to the Entrance evaluation (if applicable)
  + Behind the Entrance Evaluation is the information relating to payments:
    - For self paid students, ensure all the receipts are sorted chronologically and clipped together
    - For sponsored students (Work Safe BC, Healthcare Benefit Trust, Private Insurance, corporate, etc.) ensure copies of the invoices are clipped together. If there is an extra copy of the sponsorship letter (i.e. there’s one copy of the sponsorship letter already attached to the student contract), paper clip this sponsorship letter to the invoice.
    - For students sponsored by Service Canada/EI ensure all the receipts are sorted chronologically and clipped together
    - For student loans students, ensure the (yellow) Certificate of Eligibility and Canada Student Loan Agreement and Confirmation of Enrolment documents are sorted chronologically and clipped together. Place this behind the Appendix 3, located behind the Entrance exam.
    - Under the payment area on the Student File Checklist, for all students who are **not** funded by Student loans, write **N/A** next to the Yes No boxes. For students funded by Student Loans, ensure that (yellow) Certificate of Eligibility and Canada Student Loan Agreement and Confirmation of Enrolment documents then ensure that **Yes** is circled for both these documents.
  + Once all the documents relating to payments have been sorted and clipped together, a T2202A receipt needs to be issued for tuition payments made in the current calendar year. Only those students who are Self paid, on student loans or funded by Service Canada/EI are entitled to a T2202A tax receipt
    - When filling out the T2202A.pdf file, all the information with the exception of the Student Number only needs to be entered once under section 1. The Student Number needs to be reentered under section 2.
    - For students enrolled in individual courses, type *Individual Certificates* for the **Name of Program or course**.
    - If the student is enrolled for less than 20 hours per week, the student is considered a **Part time** student, otherwise, the student is considered a **Full time** student. When calculating the number of months do not forget to include both the first month and the last month in the range – i.e. January to April = 4 months
    - For the **Name and address of Educational institution**, the following format **must** be used:
      * Langley: **0833888 B.C. Ltd. o/a Academy of Learning** on the first line, followed by the entire address on the following line (**5722 Glover Road, Langley BC B3A 4H8**)
      * Abbotsford: **0833917 B.C. Ltd. o/a Academy of Learning** on the first line, followed by the entire address on the following line (**#103 – 32833 South Fraser Way, Abbotsford, BC  V2S 2A6**)
      * Richmond: **Upgrade Learning Academy Inc. o/a Academy of Learning College** on the first line, followed by the entire address on the following line **6531 Buswell Street, Richmond, BC V6Y 2G9**
    - Once all the information has been entered onto page 1, the T2202A tax receipt can be printed but it must be printed double-sided using one sheet of paper.
    - Next, cut the T2202A tax receipt just above section 3. Staple this section 3 of the T2202A receipt at the top of the payment information in the student’s file. Section 1 and 2 of the T2202A will be given to the student along with their diploma/certificate(s), transcripts, etc.
    - On the Student File Checklist, ensure to initial and date the *T2202A* boxes under **Closed File**
  + The next set of documents behind the payment information relates to progress reports and attendance information.
    - For Self paid and corporate students, ensure the *Attendance Activity Details* report (sorted chronologically) is printed. Staple the **Student Record** behind this attendance report.
    - For sponsored students (Work Safe BC, Healthcare Benefit Trust, Private Insurance, etc.), ensure all the monthly progress reports are sorted chronologically. Paper clip the **Student Record** behind these progress reports.
    - For Student loans students, the attendance reports will be printed by Scot therefore place the **Student Record** behind the student loan documents (Certificate of Eligibility and Canada Student Loan Agreement and Confirmation of Enrolment documents)
    - On the Student File Checklist, under the **Progress and correspondence** section, ensure the three items are checked off “See file for reports and documentation” is written next to these three items
* Using the Exit Interview checklist, send Ros an email to request the student’s diploma/certificate. If you are closing more than one file, send Ros one email for all the files and include the following information:
  + Student’s name as per the Exit interview checklist
  + Student’s contract number
  + Name of the program, or list of individual courses
  + On the Student File Checklist, initial and date next to *Diploma/Certificate requested*
* Every file must have copy of a signed transcript in the student’s file. Before proceeding with generating the Official Transcript using the Reports feature in the ACME , the following must be complete:
  + In the CMS, on the **Main** tab, change the status from Active to **Inactive**. On the **Program/Contract** tab, double click the contract number and change the **Date Finished** to the student’s last day of class and the Status to **Complete**. Click **Apply Changes** before switching to the ACME **Reports** feature.
    - On the Student File Checklist, initial and date next to *Close off on CMS*
  + Under the **Student** menu, under the **Transcript Reports** submenu, select **BC Official Program Transcript** if the student was enrolled in a program, or select **BC Official Course Transcript** if the student was enrolled in individual courses.
  + Change the User Status to **Inactive** before scrolling down the list to search for the student’s transcript. Once the student’s transcript is displayed click the **Excel** button to export the transcript to Microsoft Excel. Once the transcript has been converted to an Excel file, the following changes need to be made:
  + Delete columns A, C, and G. Delete row 1. You should now have five columns (A to E) containing information.
  + If necessary, delete the rows containing the following course codes: **BCArchive**, **BCAssess**, or **BCRegis**
  + Adjust the column width for column E to **16.29**, and adjust the column widths for columns **B** and **D** to **19**, and change the column width for column **C** to **18.5**
  + Select the range A1:E5 and open the **Format Cells** dialog box. On the **Alignment** tab, ensure both **Wrap text** and **Merge cells** check boxes are checked, and change the **Vertical** text alignment from Top to **Center**
  + Select the range of cells containing all the information for the transcript and **Set Print Area**
  + In the **Page Setup** dialog box, make the following changes:
    - Change the Orientation from Landscape to **Portrait**
    - Change the left and right margins to **0.6** inches, the top to **.75** inches, and the bottom to **0.5** inches. Under **Center on page** check the **Horizontal** box
    - Clear the footer – i.e. change to **(none)**
  + Once the changes in the Page Setup dialog box has been made, if the bottom of the transcript does **not** fit onto page 1, then make the following adjustments:
    - Adjust the top margin to **.5** inches
    - Change the row height for the blank rows above and below the school address and above the school name to **6.5** pixels
    - Adjust the row height for the rows containing the school name (rows 6 to 8), school address (rows 10 to 13) and the course names and grades to **13.5** pixels
    - Once these adjustments have been made, the transcript should fit onto one page. If it doesn’t, email me the transcript.
  + Near the bottom of the transcript, revise the title from Director to **Executive Director**. In the cell above Executive Director, ensure that either **Scot Friskey** or **Alda Messiah**’s name appears – this depends on whether it is Scot or Alda that will be signing the transcript
  + Save the transcript as an .**xls** file in the designated Transcripts folder, using the Campus Name – Student Name (Program Name) naming scheme – i.e. **Langley – Jane Smith (Office Administration)**
  + Preview the transcript to ensure it fits onto one page. Print one copy of the transcript and ensure the transcript is signed.
  + Once the transcript is signed, make a copy of the transcript and place the copy at the very front of the file. The original transcript will be given to the student along with their Diploma/certificate, tax receipt, etc.
  + On the Student File Checklist, initial and date next to *Copy of Transcripts of Marks*
* For students enrolled in a certificate or diploma program, a *Director letter* needs to be created. Using the Director letter template fill out the appropriate fields and print the Director letter on letterhead.
  + Depending on whether Scot or Alda is signing the letter, ensure their name is selected above “Executive Director”
  + Once the Director letter is signed, make a copy of the transcript and place the copy behind the copy of the transcript. The original Director letter will be given to the student along with their Diploma/certificate
  + On the Student File Checklist, initial and date next to *Grad/Director Letter AoL*. For those students enrolled individual courses, write **N/A**
* It will take approximately two to three weeks (generally two weeks) for the delivery of the Diploma/certificate from Head Office.
* After the Diploma/certificate has been signed, make a copy of the Diploma/certificate and place the copy behind the transcript.
* Put the signed Diploma/certificate, signed transcript, T2202A receipt (if applicable), Director letter (if applicable) in an envelope.
  + For MOA students, ensure their CMAP certificate and pin is also placed in the envelope.
* Contact the student and let them know that their Diploma/certificate is available for pick up.
  + On the Student File Checklist, initial and date next to *Diploma/certificate mailed out*
* For students sponsored by Service Canada, WorkSafe BC, Healthcare Benefit Trust, or any other agency where monthly reports regarding the student’s progress is sent, fax a copy of the student’s transcript and Diploma/certificate to their sponsoring agency.
  + Ensure to include a fax cover sheet when faxing the Diploma/certificate and transcript.
  + Staple the fax cover sheet behind the other progress reports and the Student Record.
  + On the Student File Checklist, initial and date next to *Diploma/Certificate sent to sponsor agency*. For students not sponsored (i.e. Self Paid, Student Loans, etc.), write **N/A**
* The final step involves scanning and uploading the transcript, Diploma/certificate, and enrolment contract to DataWitness.
  + Ensure the documents are in the following order before scanning them: transcript, Diploma/certificate, and first two pages of the enrolment contract
  + Once these documents have been scanned, rename the file using the following naming scheme: Student Name (Program Name).pdf – i.e. **Jane Smith (Office Administration).pdf**
  + When returning the transcript, Diploma/certificate and contract to the student file folder, ensure, that the documents are returned in the following order:
    - Transcript
    - Diploma/certificate: this includes CMAP certificate for MOAs
    - Director letter (if applicable)
    - Exit interview checklist with the *Student acknowledgement release of information* stapled
    - Student enrolment contract
  + Move this file into the appropriate designated DataWitness folder :
    - If the student’s contract value is ***less than $1000***, ensure to move this scanned file in the Graduated subdirectory the *Under* *$1000* folder. Place the file in the year folder matching the year on the student’s file folder
    - If the student’s contract value is ***greater than*** ***$1000***, ensure to move the scanned file in the Graduated folder, under the year matching the student’s file folder.
* Only those contracts, where the contract value is greater than $1000 needs to be uploaded to DataWitness:
  + Navigate to [**www.datawitness.com**](http://www.datawitness.com) . Click on the [**Client Login**](https://www.datawitness.net/login.php) link in the top right hand corner
  + For username and password, use the following:
    - Richmond: **academyoflearningric**; password: **buswell**
    - Langley: **aolla**; password: **0833888la**
    - Abbotsford: **aolab**; password: **0833917ab**
  + Once you’re logged in, ensure that there is at least *1 submission* for the **Balance**; if not, please contact Rose or Dragan
  + Click the **StoreIt** tab. Navigate to the year matching the student’s file folder (i.e. 2011)
  + Click on the **Graduated** folder (or **Withdrawn** if closing out a withdrawal file)
  + Click the **Add Files** link which will display the **Authenticate and Archive** fields.
  + For the **Title**, use the *Student Name (Program Name)* naming scheme – i.e. **Jane Smith (Office Administration)**
  + Browse and navigate to the designated *DataWitness* folder. Locate and select the scanned file for the student. Click **Open**.
  + Repeat the above steps, if necessary to upload other files.
  + Click the **Upload** button. Once the file(s) have been uploaded, **Log Out**.
  + On the Student File Checklist, initial and date next to *Documents uploaded to DataWitness*. For those students whose contract values are *less than $1000*, write **N/A**
* The process of closing out the file is complete. Put the file away in the designated filing cabinets under the year matching the student file folder.

# HCA Contracts

How to Close

1. Ensure that all marks are entered into CMS by the Healthcare Division including the 2 Clinical Placements (Assisted Living and Dementia)
2. Ensure dates are correct for the 5 courses ending in “e” and change status to “Finished”.
3. Ensure that Archiving, Assessment and Registration have been changed to “Fee Only”
4. When requesting diploma request “Diploma and Certificates”.
5. Scan the diplomas and certificates and email them to the individual students.

# Data Witness

NOTE: Only students who have contracts totaling over $1000 need to be uploaded to Data Witness.

1. Navigate to [www.datawitness.com](http://www.datawitness.com).

2. Log-in using the following username and password:

Langley Username: aolla

Langley Password: 0833888la

3. Ensure there is at least one submission available under balance. If there is not, contact Rose or Dragan.

4. Under the StoreIt tab, navigate to the year corresponding to the student’s file folder.

5. Click on the appropriate folder (i.e. Graduated, Withdrawn)

6. Click the Add Files link which will display the Authenticate and Archive fields.

7. For the Title, use the Student Name (Program Name) naming scheme

8. Browse to the designated DataWitness Folder. Locate and select the scanned file for the student. Click open.

9. Repeat above steps if necessary to upload other files.

10. Click the Upload button. Once the files are uploaded, log out.

11. On the Student File Checklist, initial and date Data Witness Section.

# Exam Invigilations

## Booking an Exam

1. Make sure to let the student know that we accept $30 cash only for the exam. We do not carry change so make sure they bring exact cash only.

2. When a student calls to book an exam invigilation open up the Exam Booking Excel Spreadsheet on the desktop. Take all of the information necessary.

3. Add an appointment in Outlook for the day and time of the exam along with the student’s name. Set a reminder for this appointment for 1 day (unless it is for a Monday, then set the reminder for 3 days).

## Receiving an Exam by Email

1. Move all emails pertaining to an Invigilation exam to the Exam Invigilation Booking folder under the month the exam is booked for.

2. In the Exam Booking Excel Spreadsheet ensure to record that the exam has been received.

## Receiving an Exam by Mail

1. File the paper exam in the Facilitator Desk Drawer under Invigilations.

2. In the Exam Booking Excel Spreadsheet ensure to record that the exam has been received.

## The Day of the Exam

1. Take $30 payment from student and issue a receipt.

2. Set student up with their exam according to the exam specifications.

3. Once student has completed their exam move their information on the Exam Booking Excel Spreadsheet from the Exam Invigilations worksheet to the Past Invigilations Worksheet.

# New File Checklist

* File Checklist inc. ID
* Monthly Reports
* Orientation Package Signed
* Contract Signed
* Appendix B
* Appendix A if over $1000
* Student Data Sheet
* 2 copies Contract
  + Dragan
  + Head Office
* If Sponsored create monthly report
* Add to Weekly Attendance file
* Add to Current Students
* Add Student to Server
* Add Student to CMS
* Assign Books
* Make Orientation Sheet
* Make Student Instructions for media etc.
* Add Student Record to Binder
* Put file in correct order

New File Checklist

* File Checklist inc. ID
* Monthly Reports
* Orientation Package Signed
* Contract Signed
* Appendix B
* Appendix A if over $1000
* Student Data Sheet
* 2 copies Contract
  + Dragan
  + Head Office
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* Add to Weekly Attendance file
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* File Checklist inc. ID
* Monthly Reports
* Orientation Package Signed
* Contract Signed
* Appendix B
* Appendix A if over $1000
* Student Data Sheet
* 2 copies Contract
  + Dragan
  + Head Office
* If Sponsored create monthly report
* Add to Weekly Attendance file
* Add to Current Students
* Add Student to Server
* Add Student to CMS
* Assign Books
* Make Orientation Sheet
* Make Student Instructions for media etc.
* Add Student Record to Binder
* Put file in correct order

# Official Order of Documents in a Students’ File (Closed)

1. File Checklist with id (Stapled inside left cover of file folder)
2. Copy of Transcript
3. Copy of Certificate(s)/Diploma
4. *Director’s Letter (advanced programs only)*
5. Exit Interview
6. Contract with Appendix B
   1. *Addendum (contract extension) stapled to front if necessary*
   2. *Appendix A if contract over $1000 stapled behind contract*
   3. *Sponsorship letter stapled at back*
7. Personal Data Sheet
8. Student Orientation / Welcome Package (Stapled together)
   1. Student Orientation
   2. *Obligations of BC Student Assistance (Student Loan Only)*
   3. Attendance Agreement
   4. Student Handbook Acknowledgement
   5. Student Campus Orientation Checklist
   6. Internet Usage Policy
9. *Entrance Exam (advanced programs only) / Typing Test (Stapled)*
10. *Acceptance Letter (Certain sponsored students)*
11. *Appendix 3 (Student Loan only)*
12. *Invoices (Stapled together with receipts if possible)*
13. *Receipts (Stapled together with invoices)*
14. Progress Reports or Attendance if not sponsored (stapled together)
15. Correspondence (paper clipped together)
16. Monthly Meetings (Stapled inside right cover of file folder)

# Official Order of Documents in a Students’ File (Current)

1. Contract with Appendix B
   1. *Addendum (contract extension) stapled to front if necessary*
   2. *Appendix A if contract over $1000 stapled behind contract*
   3. *Sponsorship letter stapled or paper clipped at back*
2. Personal Data Sheet
3. Student Orientation / Welcome Package (Stapled together)
   1. Student Orientation
   2. *Obligations of BC Student Assistance (Student Loan Only)*
   3. Attendance Agreement
   4. Student Handbook Acknowledgement
   5. Student Campus Orientation Checklist
   6. Internet Usage Policy
4. *Entrance Exam (advanced programs only) / Typing Test (Stapled)*
5. *Acceptance Letter (Certain sponsored students)*
6. *Appendix 3 (Student Loan only)*
7. *Invoices (paper clipped together with receipts if possible)*
8. *Receipts (paper clipped together with invoices)*
9. Progress Reports or Attendance if not sponsored (paper clipped together)
10. Exams (paper clipped together)
11. Correspondence (paper clipped together)
12. Monthly Meetings (Stapled inside right cover of file folder)

# Opening Procedures (Langley)

1. Unlock Doors

* Front Door
* Downstairs Elevator
* Back Door and Gate
* Upstairs Door
* Upstairs Elevator

2. Disarm Alarm System

3. Turn on ALL lights

4. Plug in Coffee Urn (prepare coffee if necessary)

5. Turn on BOTH Heat/Air Systems

6. Check Voicemail

7. Sync Attendance on Attendance Computer

8. Check if there is any new starts for the day, if so make sure that everything necessary has been done for you to start them

9. Ensure both bathrooms are well stocked

# 

# Closing Procedures

1. Clear Facilitator Desk. Ensure all notes to be left for staff are visible i.e taped to ledge by computer

2. Ensure all filing is complete (i.e. exams, exam folders, textbooks etc.) NOTE: if you cannot find the file needed, please leave a note stating this.

3. Dust and tidy ALL computer workstations: Monitors, Keyboard, Mice etc.

4. Sync Attendance on Attendance Computer

5. Prepare coffee for next day

6. Clean sink and countertop. Ensure all dishes are washed

7. Empty ALL garbage cans

* Dragan’s Office
* Admissions Office
* Lunchroom
* Boardroom
* Sink
* Facilitators Desk
* Administration Office
* Director’s Office
* MOA Classroom

8. Update date on whiteboard to tomorrows date

9. Turn off BOTH heat/air systems

10. Turn off ALL lights

11. Close doors to Admissions Office

11. Lock Doors

* Upstairs Elevator
* Upstairs Door
* Back Door and Gate
* Downstairs Elevator
* Front Door

12. Alarm System

# Facilitator Duties (Langley)

# Opening Shift

(9 am – 5 or 8 pm)

* Unlock all doors
* Unarm alarm system
* Turn on lights
* Plug in coffee urn
* Turn on heat/air systems
* Ensure computers are on
* Check voicemail
* Other tasks as assigned

# Closing Shift

(9 am – 5 or 8 pm)

* Ensure all filing is complete (i.e. exams, exam folders, textbooks etc.) NOTE: if you cannot find the file needed, please leave a note stating this.
* Dust and tidy all computer desks, monitors, keyboards, etc.
* Prepare coffee for next day (including Saturday)
* Clean sink and countertop, ensure dishes are washed
* Empty **ALL** garbage cans (make sure to check all offices), and take out garbage
* Tidy Facilitator Desk
* Turn off all student computers daily
* Turn off heat/air systems (please make sure both systems are in the OFF position)
* Turn off all lights
* Lock elevator
* Alarm system
* Other tasks as assigned

# Support Shift

(9 am or 10 – 2 pm)

* Update Job Board
* Ensure bathrooms and lunchroom are well stocked
* Take out recycling and garbage
* Other tasks as assigned

# Evening Shift

(12 pm – 8 pm)

* Clean lunchroom (disinfect table and countertops, clean microwave)
* Clean bathrooms (disinfect countertops and wash floors)
* If emails are checked, mark as unread so they can be dealt with the next morning
* Complete all closing shift duties
* Other tasks as assigned

# Saturday Shift

(9 am – 1 pm)

* Disinfect all headphones and mice
* Empty refrigerator
* Complete all closing shift duties
* Other tasks as assigned

# All Staff

* Please ensure to fill out weekly attendance sheet as students arrive for the day. If you are unable to fill it out right away, please make sure to do it by the end of your shift.
* If a student finishes their last course, please leave the file on the desk with a quick note stating this.

# T22O2A Preparation

NOTE: Only students who are Self Paid, on Student Loans or funded by Service Canada are entitled to a T22O2A Tax Receipt. This form is to be filled out after the student has completed their courses.

1. Ensure all payment information is clipped together.

2. Open the blank T2202A.pdf file.

* Fill in all student information into Section 1.
* In Section 2 enter only the student number.
* For students enrolled in individual courses, type “Individual Certificates” for the Name of Program or Course section.
* If the student is enrolled for less than 20 hours per week they are considered Part-Time students, otherwise they are considered Full Time.
* When calculating the number of months include both the first month and the last month in the range (i.e. January – April = 4 months).
* For the Name and Address of the Educational Institution, the following format must be used:
  + Langley: 0833888 B.C. Ltd. o/a Academy of Learning on the first line followed by the entire address on the following line.
  + Abbotsford: 0833917 B.C. Ltd. o/a Academy of Learning on the first line followed by the entire address on the following line.

3. Once all information has been entered the document can be printed double-sided using one sheet of paper.

4. Cut the T2202A just above Section 3. Staple Section 3 to the top of the payment information in the student’s file. Section 1 and 2 are given to the student along with their Diploma and Transcript.

5. On the Student File Checklist, ensure to initial and date the T2202A boxes under Closed File.

# Transcript

1. The Students file must be closed off in CMS.

2. Under the Student Menu in the Report section of CMS, select the Transcript Report that applies (i.e. Course or Program).

3. Navigate to the student in the dialog box. Once the transcript is displayed, click the Excel button to export.

4. Delete columns: A, C and G and row 1. Also delete the rows containing: BCArchive, BCAssess or BCRegis

5. Adjust the column width for column E to 16.29, column B and D to 19 and C to 18.5

6. Select the range A1:E3 and open the Format Cells Dialog Box. On the Alignment Tab, ensure Wrap Text and Merge Cells check boxes are checked. Change the Vertical Text Alignment to Center.

7. In the Page Setup Dialog Box, make the following changes:

* Orientation to Portrait
* Change the Left and Right Margins to .6 inches
* Change the Top Margin to .75 inches
* Change the Bottom Margin to .5 inches
* Check the Horizontal box under Centre on Page
* Clear the footer

8. Change the Title for Director to Scot Friskey.

9. Save the transcript as an .xls file in the designated Transcripts folder using the Campus Name-Student Name (Program Name) naming scheme.

10. Ensure the Transcript fits on one page.

11. Print Transcript and get Scot to sign.

12. Photocopy signed Transcript and place copy in Students File.

# CertBlaster Exam Preps

Academy Online has purchased licenses for Cert Blaster exam preps to be given to Academy of Learning students enrolled in the new A+ and the existing MCSA/MCSE programs. These Exam Preps will test a student’s knowledge and help them prepare to write their industry certification exams. They are available in four different modalities: Assessment, Certification, Study, and Flash. Students will receive all of the exam preps for each course at the beginning of their program. It is important to advise students not to use these tests to study from, but to consider them an additional feature or enhancement to their courses.

The Cert Blaster Exam Preps must be requested by a Director, Facilitator or Admissions Representative from the campus where the student is enrolled. Students must have a personal email address in order to receive the test preps related to his/her program. The campus must contact Andrea Sykorova with the name/s of the student/s, their date of registration and the name of the program they are enrolled in, either by way of an “Academy Online” WonderDesk Query or directly to Andrea at asykorova@academyoflearning.com. Andrea will send the

student via email a Welcome Letter, Installation Guide and an Activation Code. This will enable the student to download and install the Cert Blaster software onto their hard drive on their personal PC at home. Once activated the student will have 2 years to access the exam preps. If a student moves or loses their Cert Blaster Exam Prep Software for any reason, Andrea will reactivate the code. This will be done only once.

# Password Information

The password syntax is as follows:

FriskeyLA4040  
FriskeyAB3315  
FriskeyRM3907

This set is active on the flowing sites:

* Academy of Learning secure site (secure.academyol.com)
* Server login
* Facilitator computers (except Richmond – rec3ption)
* Attendance computer
* CMS exam and attendance accounts
* Router admin passwords

# Server Passwords

Richmond: fRISKEYrm39O7 (capital letter O)  
Langley: fRISKEYla4O4O (capital letter O)

Abbotsford: fRISKEYabEE15

## Telus Email and Passwords

Richmond:

* Account Number: 002421051
* Primary Email: a8a23494@telus.net
* User ID: a8a23494
* Password: Higgins

Admin and sub-accounts

* Facilitators: a8a23494@telus.net (Alias: aolrichmond@telus.net)
* Executive Director: a8f23494@telus.net (Alias: scotfriskey@telus.net)
* Executive Director: a8h23494@telus.net (Alias: aldamessiah@telus.net)
* Director Admissions: a8g23494@telus.net (Alias: admissionsrichmond@telus.net)

Student-Use sub-accounts

* Account: a8b23494@telus.net (Alias: student2@, student3@, student4@telus.net)
* Account: a8c23494@telus.net (Alias: student6@, student8@telus.net)
* Account: a8d23494@telus.net (Alias: student11@telus.net)

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