Closing out Files

Once a student has finished you must order their Certificate(s) or Diploma from Head Office. Once this has arrived (it normally takes 2 – 4 weeks) you can close out the students file.

# Student File Checklist

* Staff initials and dates or N/A appear down the entire checklist:
* Ensure the **Payment Information** recorded in the file and in CMS match.
* Generally the Director of Admissions will initial the **Documents** and **Signed Student Acknowledgment of** sections.
* Under the **Progress and Correspondence** section write: *See file for reports and documentation.*
* The Director of Admissions should have initialed and dated the “Appendix 3 on file” and “Negotiated documents” boxes under the **Loan Documents** section.
  + Ensure that the Appendix 3 is in the file behind the Entrance Exam.
  + Check the file to ensure copies of the Canada Student Loan document and the Confirmation of Enrollments form are clipped together.
* Initial and date, or write N/A, in the **Withdrawals** section.
* In the **Closed File** section, make sure to initial and date all of the applicable boxes as you complete them.

# Transcript

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

* 1. On the Main tab of CMS, change the status from Active to Inactive.
  2. On the Program/Contract tab, double click the contract number and change the Date Finished to the student’s last day of attendance and then change the status to complete.
  3. Apply changes to save.
  4. Initial and date the file checklist next to “Close file in CMS”.

2. Under the Student Menu in the Report section of CMS, select the Transcript Report that applies (i.e. BC Official Course Transcript for individual certificates or BC Official Program Transcript for program students).

3. Navigate to the student in the dialog box (select the User Status as Inactive). 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 if necessary.

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 (change to none on the footer tab)

8. Change the Title for Director to Scot Friskey or Alda Messiah.

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 or Alda to sign.

12. Photocopy signed Transcript and place the copy on the top of the student’s file. Also make a photocopy of the signed Certificate(s) or Diploma and place the copy under the transcript in the students file. The originals will go to the student.

13. On the student file checklist, initial and date the boxes next to “Copy of Transcript of Marks”.

14. Shred all exam marks and control sheets.

# Director’s Letter

# Note: Only students who are signed up for a full Certificate or Diploma Program need a Director’s Letter

1. Using the Director letter template, fill out the appropriate fields and print the letter on letterhead.

2. Ensure either Scot or Alda’s name is selected above Executive Director.

3. Once the Director’s Letter is signed, make a copy of it and place it behind the Certificate or diploma. The original will be given to the student.

4. On the Student File Checklist, initial and date the boxes next to “Grad/Director Letter AOL”.

# T2202a

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.

1. Fill in all student information into Section 1.
2. In Section 2 enter only the student number.
3. For students enrolled in individual courses, type “Individual Certificates” for the Name of Program or Course section.
4. If the student is enrolled for less than 20 hours per week they are considered Part-Time students, otherwise they are considered Full Time.
5. When calculating the number of months include both the first month and the last month in the range (i.e. January – April = 4 months).
6. 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.

# Attendance and Progress Reports

1. Ensure you have the proper attendance and progress reports for the student:

* 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).

2. 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.

# Scan Documents

* The following documents need to be scanned in the following order:

1. Transcript
2. Certificate(s) or Diploma
3. First 2 pages of short contract or first 3 pages of long 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
* 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.

# 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: academyoflearningric

Langley Password: buswell

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

# Additional Steps

* 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.
* If applicable, add the student to the Graduation spreadsheet

# Closing the Physical File

* Ensure the File is in the Following order:

**Note: Italicized items may not apply to every file**

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 Checklist and the student’s Acknowledgement of Release of Information form stabled together.
   1. *Student Personal Loan Repayment Information package and Student Loan Information and Review Package, stapled together.(Student Loan)*
6. Contract with Appendix B and stapled with the following forms if necessary:
   1. *Addendum stapled to front if necessary (contract extensions)*
   2. *Appendix A if contract over $1000 stapled in front of Appendix B*
   3. *Sponsorship letter stapled at back (Sponsored students)*
   4. *Notification of Assessment stapled at back (Student Loans)*
   5. *Credit Card Authorization form stapled at back (Self Paid students)*
7. Personal Data Sheet
   1. Student Outline stapled inside the data sheet
   2. *Student resume (if we have a copy) stapled inside 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. *Certificate of Eligibility and Canada Student Loan Agreement and Confirmation of Enrollment, sorted chronologically and paper clipped together.*
13. *T2202a (Self Paid), Receipts and Invoices, stapled together*
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)