ClassMate *for* Adult Education

Student & Employee Forms

October 11, 2018

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Student & Employee Forms

Overview

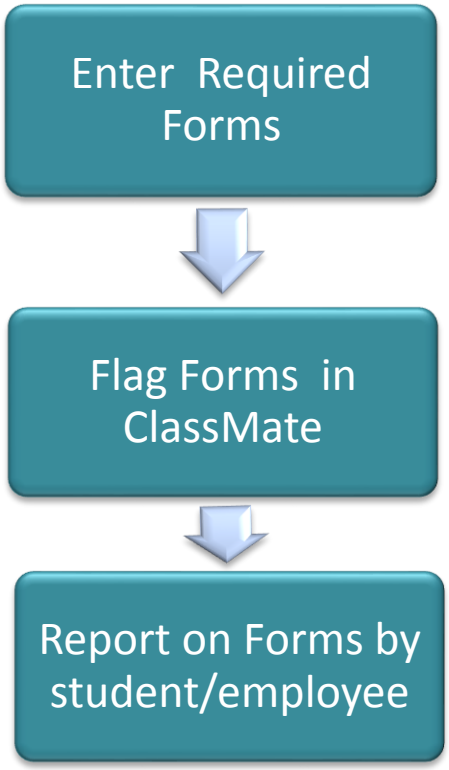
CTE 's are required to collect a variety of student and/or employee forms to be kept them on file. The task of maintaining the forms collected then determining which students/employees have missing or expiring forms can be an overwhelming and time consuming process.

ClassMate has functionality that easily and efficiently manages the forms collection and record keeping process. ClassMate allows users to customize the names of the forms your school is required to collect. Additionally, all forms can be linked to the specific Courses they are required for so only the students with enrollment in those courses need to have the forms collected. Collected forms received are then flagged in the system by Support Staff.

Administrators can easily identify missing and expiring forms via reporting.

Schools utilizing the Document Linkage functionality can also link selected documents that are Forms and the system will mark the form as selected for both students and employees.

Contact your ClassMate professional services team member for more information regarding this functionality.



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Student & Employee Forms

What we'll Learn…..

Forms Pre-Requisites

-Base Data Setup: Employee Management
-Base Data Setup: Student Forms Management

Student Forms Management

- Viewing Forms
- Creating ALL Student Forms
- Creating Forms for Specific Courses
- Tracking Forms
- Expiring Forms
- Forms Reporting

Module & Report Assignments

Administrative Modules

--Student Registration/Enrollment

Administrative Reports

-Expiring Student Forms by Class
-Expiring Student Forms by Student
-Forms List by Student
-Student Forms by Student/Course
-Student Forms by Course
-Student Forms List by Form
-Forms Checklist by Student

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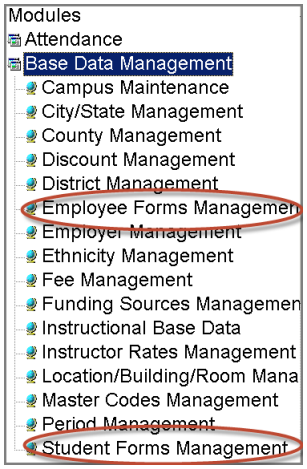
Student & Employee Forms

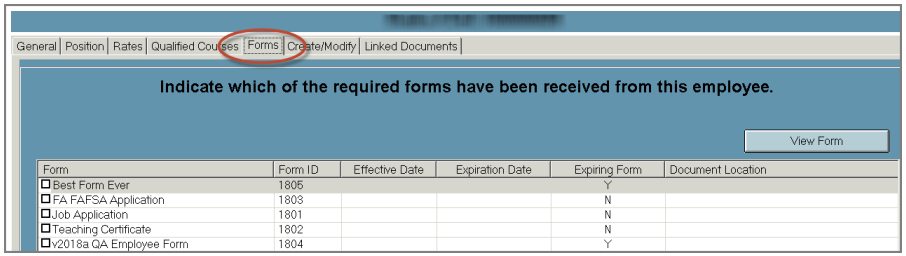
Getting Started: Creating Employee Forms

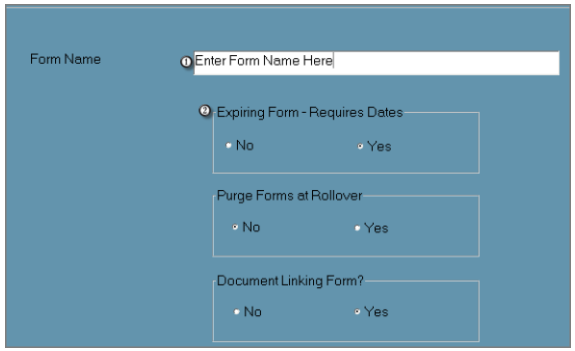
Double Click **My Modules** > Double click **Base Data** >
Click **Employee Forms Management**

1. To create a new form enter the **Form Name** in the field
2. Select the appropriate form options. These include:
   - **Expiring Form**: Will require the user to enter a start and end date when selected
   - **Purge at Rollover:** System will remove the flag indicating the form was received at rollover
   - **Document Linkage:** System will take the linked form and place it I the dropdown for selection
3. **Save** the form and associated selections



The newly created employee form will now be available for selection in the **Employee Management module > Forms Tab**





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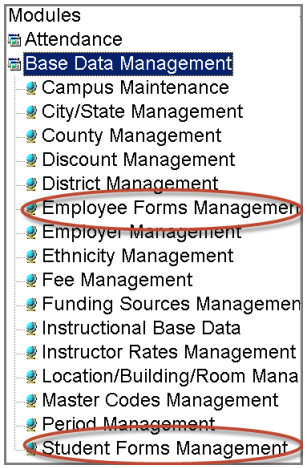
Student & Employee Forms

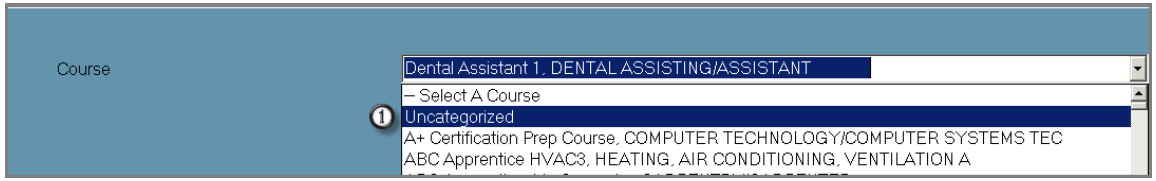
Getting Started: Creating Student Forms not linked to a course

Double Click **My Modules** > Double click
Base Data > Click **Student Forms Management**

Creating a form **NOT** linked to a Course (Uncategorized)

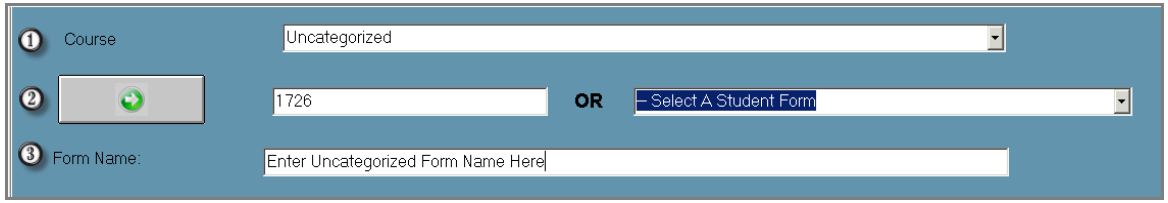


1. Select **Uncategorized Forms** from the drop down menu. Uncategorized Forms will be available to all students regardless of their enrollment



2. Select the **Grey** button with the **GREEN** arrow to create the next sequential ID number.

3. Enter the **Form Name**



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Student & Employee Forms

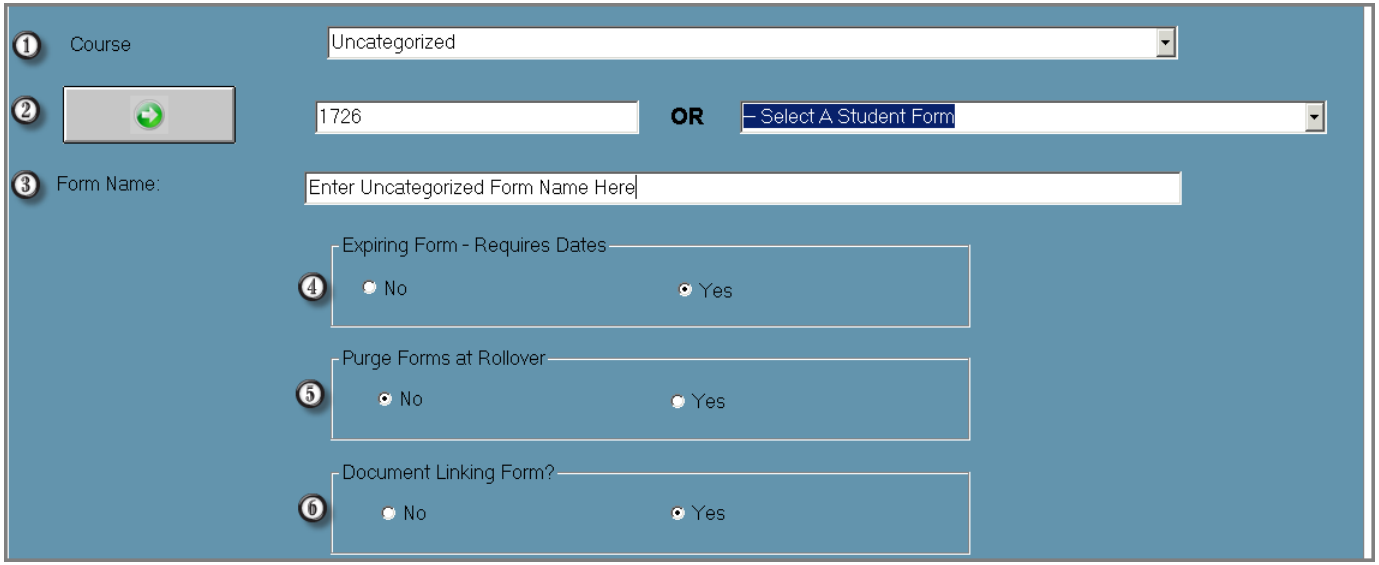
Getting Started: Creating Student Forms

Creating a form **NOT** linked to a Course

Identify the Form as:

4. **Expiring Form**: Will require the user to enter a start and end date when selected
5. **Purge at Rollover:** System will remove the flag indicating the form was received at rollover
6. **Document Linkage:** System will take the linked form and place it I the dropdown for selection

7. Select the **Save** icon to finalize the form



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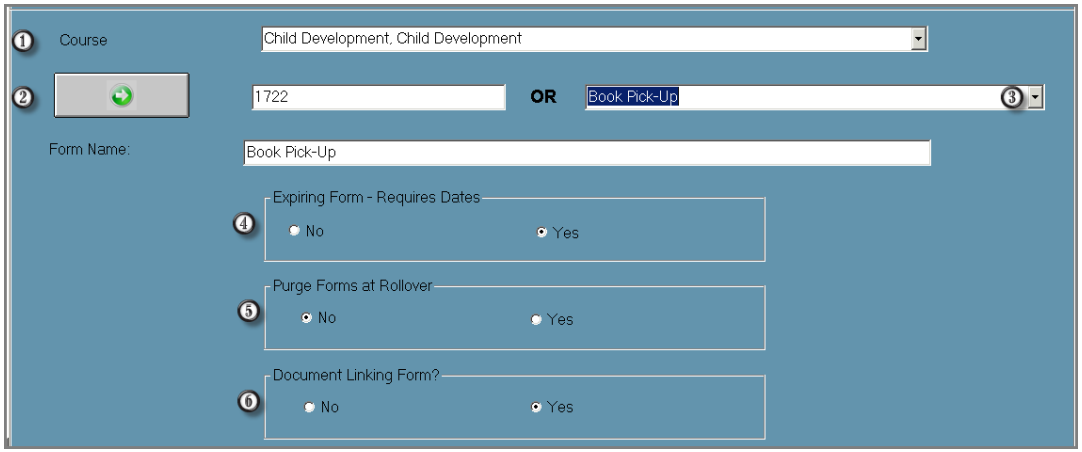
Getting Started: Creating Student Forms linked to specific Courses

By default only **Active** Course are displayed. If you would like to view an Inactive Courses or Both Active and Inactive, select the radio button accordingly. To create forms **LINKED** to specifics Courses:

1. Select **a Course** from the course listing
2. Select the **Grey** button with the **GREEN** arrow to create the next sequential ID number, enter **Form Name** and make **Form Requirement Selections** (see previous slide)

OR

3. Select a previously created form from the drop down menu. The form selected will then populate the previously created ID and defaults



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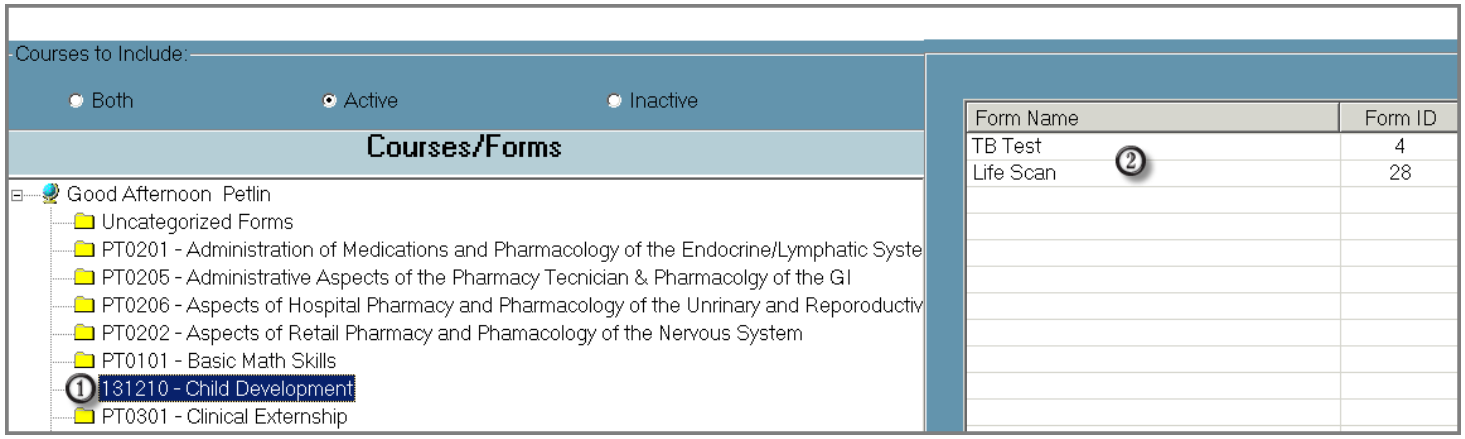
Student & Employee Forms

Viewing Courses & Linked Forms

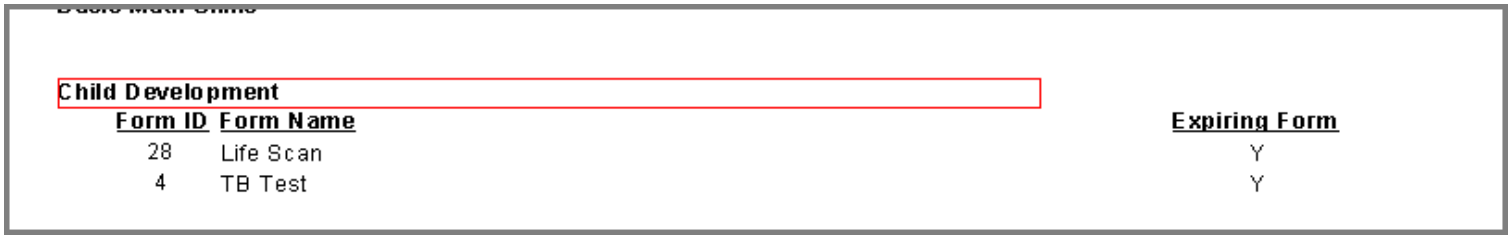
By default only **Active** Courses are displayed. If you would like to view Inactive Courses or Both Active and Inactive, select the radio button accordingly.

To view Forms linked to specifics Courses:

1. Select the **Course** you would like to view. **Note: Blue** Courses do not have any linked forms
2. Select the **Form.** Once the Form is selected all associated information will display in the grid



Helpful Report: Base Data > Student Forms by Course



Child Development

Form ID	Form Name	Expiring Form
28	Life Scan	Y
4	TB Test	Y

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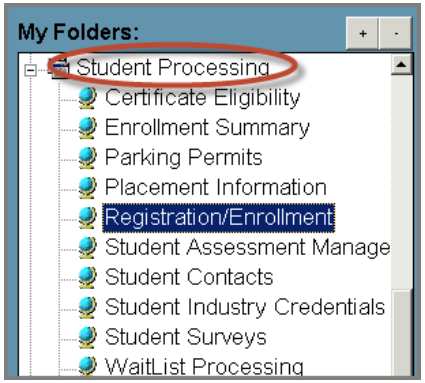
Student & Employee Forms

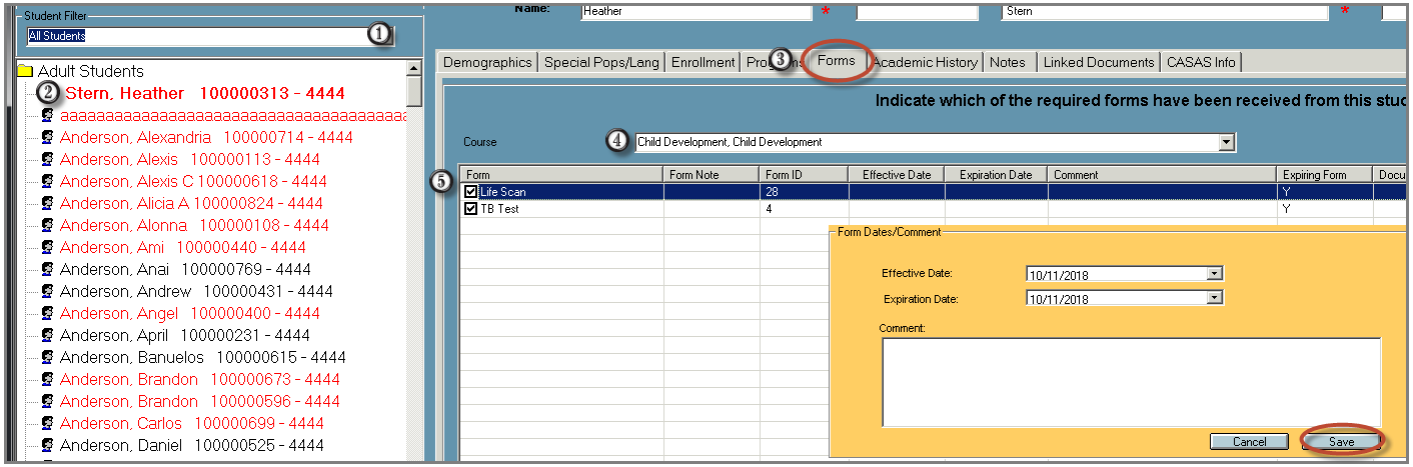
Tracking Student Forms

Getting Started

Double Click **My Modules** > Double click **Student Processing** > Click **Registration /Enrollment** > **Forms Tab**



1. Select the appropriate **Student Filter** from the dropdown menu
2. Select the **Student Name**
3. Select the **Forms Tab**
4. Select the **Course** the form is linked to from the dropdown menu
5. Select the **Form** by clicking the box to the left of the Form name



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Student & Employee Forms

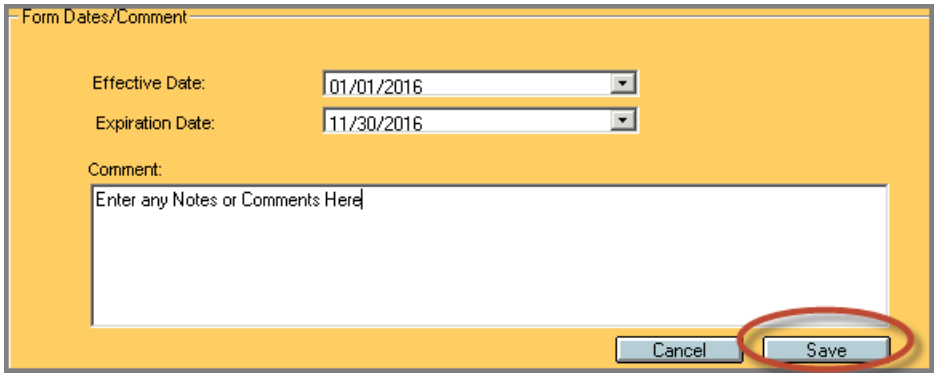
Student Registration/Enrollment: Forms Tab

Tracking Student Forms

5. Select the **Form** by clicking the box to the left of the Form name.
If the Form selected has been identified as expiring effective dates are required.
The Forms requiring dates have a **"Y"** in the Expiring Forms column.

Expiring Form
Y
N
N

-Enter the **Effective Date**:
-Enter the **Expiration Date**:
-Enter any **Comments** pertaining to this Form
-**Save**



Helpful Hint: If a Form has been identified as Expiring, Effective Dates will need to be entered. Expiring Forms reports are available to assist in identifying students with expiring forms

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Student & Employee Forms

Getting Started: Reporting

Double Click **My Reports** > Double click **Student Processing or Base Data**

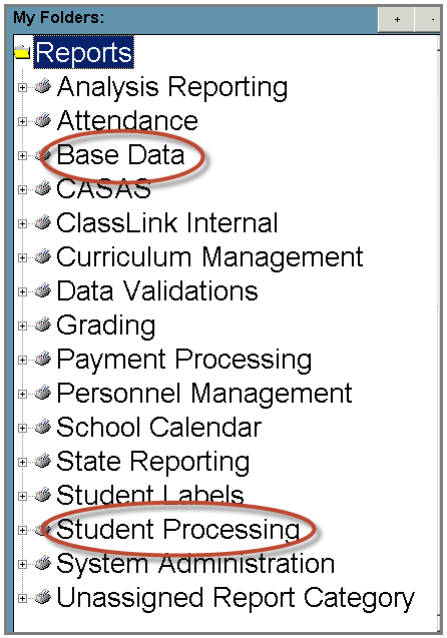
The following companion reports should be assigned to the appropriate groups or individuals:

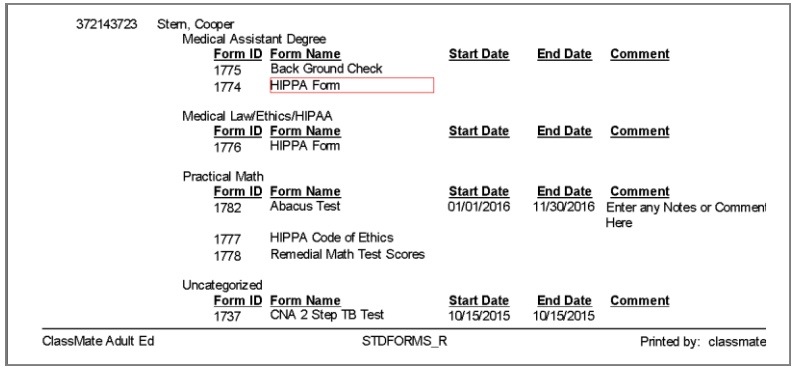
Base Data

- Student Forms by Course
- Student Forms List by Form

Student Processing

- Course Forms by Class
- Expiring Student Forms by Class
- Expiring Student Forms by Student
- Forms List by Student
- Student Forms by Student/Course
- Student Forms Checklist





372143723 Stern, Cooper

Medical Assistant Degree

Form ID	Form Name	Start Date	End Date	Comment
1775	Back Ground Check			
1774	HIPPA Form			

Medical Law/Ethics/HIPAA

Form ID	Form Name	Start Date	End Date	Comment
1776	HIPPA Form			

Practical Math

Form ID	Form Name	Start Date	End Date	Comment
1782	Abacus Test	01/01/2016	11/30/2016	Enter any Notes or Comment Here
1777	HIPPA Code of Ethics			
1778	Remedial Math Test Scores			

Uncategorized

Form ID	Form Name	Start Date	End Date	Comment
1737	CNA 2 Step TB Test	10/15/2015	10/15/2015	

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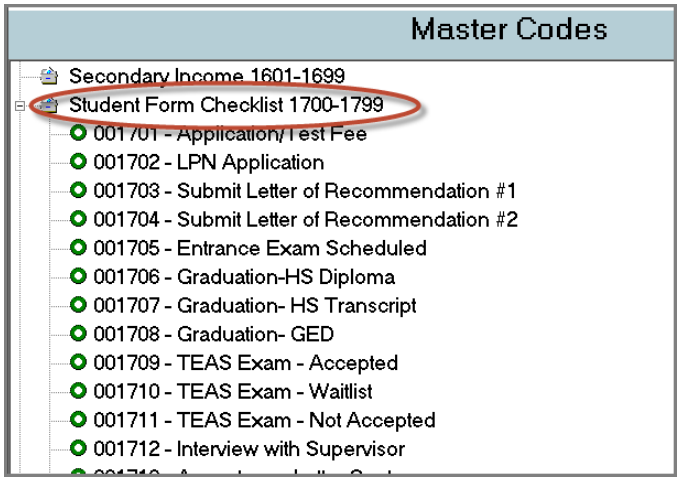
Helpful Hints

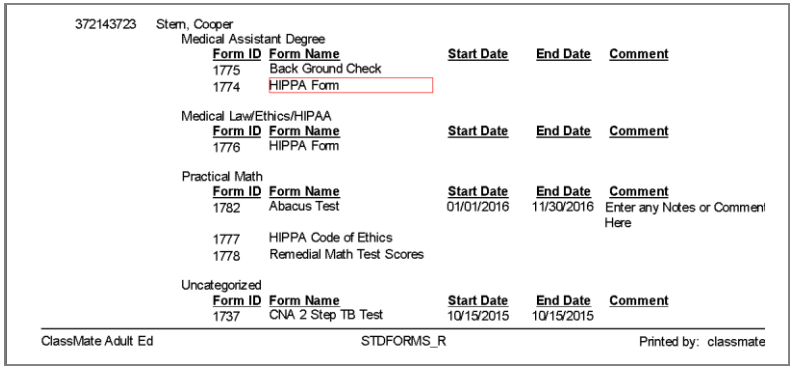
Master Codes:

Any Form previously created in Master Codes 1700-1799 in now linked to the Student Forms Management module. Users can now create and link student forms all from the Student Forms Management module and users can by pass the Master Codes module all together



Document Linkage:

When using the Document Linkage functionality, users will automatically have the Form checked on the Forms tab when the Form name is selected. If the Form is NOT displaying on the linkage drop down ensure that the Document Linkage radio button is set to “yes” in Student Forms Management



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Form ID	Form Name	Start Date	End Date	Comment
1775	Back Ground Check			
1774	HIPPA Form			

Medical Law/Ethics/HIPAA

Form ID	Form Name	Start Date	End Date	Comment
1776	HIPPA Form			

Practical Math

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1782	Abacus Test	01/01/2016	11/30/2016	Enter any Notes or Comment Here
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ClassMate *for Adult Education*

1660 Valley Center Parkway #500
Bethlehem, PA 18017

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