ProCert Manual
Supervisor

Version 2
10/30/2019
https://certification.ctc.edu/
# Table of Contents

Program Supervisor Functions ........................................................................................................... 3

Instructors ........................................................................................................................................... 3
  Add Instructor ................................................................................................................................... 3
  Edit Instructor .................................................................................................................................. 4

Instructor Status ................................................................................................................................. 5

Instructor Summary ........................................................................................................................... 5
  Cert Details ....................................................................................................................................... 6
    Certification Status .......................................................................................................................... 6
    Certification Progress ....................................................................................................................... 7

Assessment Summary ....................................................................................................................... 7

PDP Plan Details ............................................................................................................................... 8

Email ................................................................................................................................................... 8

Instructor Messaging ......................................................................................................................... 9
  One-Time Message Replies ............................................................................................................... 10
  Send New Message .......................................................................................................................... 10

First Aid/Bloodborne Pathogens Summary ...................................................................................... 11

Editing .............................................................................................................................................. 11

Send Bulk Email .............................................................................................................................. 11

My Account ...................................................................................................................................... 12

Reset Password ............................................................................................................................... 12
Program Supervisor Functions

This is document intended to show how each of the functions work for a Program Supervisor. These processes assume that there are one or more instructors in the program(s) that the supervisor is responsible for. For several steps, it is also necessary for instructors to have filled out Skills Assessment Surveys, followed by Professional Development Plans (PDP) for the supervisor to approve.

Instructors
The Instructor menu item contains two menu choices, Add instructors and Edit instructors. This is where instructor accounts are created and maintained.

Add Instructor
This is where a new instructor is created. Required fields are marked with a red arrow.

- Program is selected from a dropdown list that shows available programs.
- Emails must end in .edu. This is a decision made by the committee responsible for the new requirements.
- Unknown dates are left blank.
- Exempt dates are left blank and set in the First Aid/Bloodborne Pathogens Summary page.
- Certification date for a new user will default to 3 years. This can be set to 5 years if needed.
- Is Active check box is left unchecked if you wish to create an instructors account ahead of time. If you want it active now, then check the box.
- Send New Account Email checkbox is set as unchecked by default. If checked the new instructor will be sent an email with information on creating their account passwords and security questions. This can be done at a later time by clicking the Reset Password button in the Edit Instructor page.
When page form is completed, click the **Save Account** button. The **Reset Form** button will clear out the form.

**Edit Instructor**

This is where you can edit a current instructor. Select the instructor from the dropdown, which will populate the form.

- All fields are editable, except for the user name.
- **Save Account** and **Reset Form** operate the same as in the previous page.
- **Reset Account** will reset the user’s password and security questions. They will be sent an email with instructions on resetting their logon credentials. No other changes are made.
Instructor Status
The Instructor Status section contains two menu choices. **Instructor Summary** and **Instructor Messaging**. This is where you can monitor an instructor’s progress in creating and submitting a PDP, and follow their progress in completing their selected activities. You can also send and receive internal messages.

Instructor Summary
The instructor summary table lists all instructors in the program(s) supervised by the logged in user. The active columns allow interaction with the instructor’s certifications, if submitted. Inactive columns (no links on the text) are for informational purposes. The **Cert Details** date is the date that the certification is started. When completed the Certification **Expiration date** will be shown.
Cert Details

If the instructor has submitted an assessment survey, a date will appear in the Cert Details column as a link. Clicking the date will bring up a page where the certification status and/or progress can be viewed and worked on. There are two sections to this page, Certification Status and Certification Progress, accessed by clicking on the orange banners for either.

Certification Status

For new assessment surveys, the supervisor may either return the assessment to the instructor for further review (usually after discussions or emails), or may Approve the survey. Either are done by clicking on the appropriate check box. Note that no additional button needs to be clicked.

For a new PDP, when the instructor submits the plan, the supervisor, as with assessment surveys, can either return the plan to the instructor or approve it.

Note that the final administrator approval must be done by the college administrator or administrative assistant. For supervisors, these choices will always be inactive, they will only reflect what the administrator has done.

After approving or returning a survey or plan an email will be sent.
Certification Progress

The Certification Progress section allows the supervisor to track the progress the instructor is making against their PDP. If the PDP has not been submitted yet, this section will be empty.

Assessment Summary

Clicking on a **Submitted** or **Approved** link in this column allows the supervisor to review the assessment submitted by the instructor, and add any public or private notes as needed. The public notes will be viewable by the instructor and can contain feedback if the assessment survey must be returned for more work.
Once a PDP is approved, the instructor only needs to inform the supervisor when required activities have been completed. The supervisor can then check off the tasks using the Certification Progress section in Certification Details (as described above).

**PDP Plan Details**

If the instructor has submitted their PDP, clicking on the Submitted or Approved link in this column allows the supervisor to view the plan.

![Plan Details for Oliver Intro](image)

**Email**

The email column is “live” for immediate composition of an email. Clicking on the address will open your system’s default email client and prepare a blank email from you to the selected instructor.
Instructor Messaging

Instructor Messaging allows the supervisor to communicate with the instructor, creating new messages or replying to messages sent by the instructor.
**One-Time Message Replies**

Replies from the instructors to one-time messages can be seen here, and either replied to or marked as read. The **View History** shows all messages to date that have not been read. Checking the **View All** checkbox will show all messages.

![One-Time Message History](image)

**Send New Message**

This section allows the supervisor to initiate communications. The message can be in regards to the current certification or a one-time message. The supervisor can choose to send to a specific instructor or all instructors. The message can also be enhanced by sending an email message along with the in-program message.
First Aid/Bloodborne Pathogens Summary
The First Aid/Bloodborne Pathogens Summary menu item is intended for maintaining the named certifications. Clicking the menu item will display the supervisor’s instructors in a table containing the dates the CPR/First Aid and Bloodborne Pathogens certifications will expire. Dates in Red are past due.

Editing
Clicking the Edit button on the left side of a table row will activate the CPR/First Aid and Pathogens Expires columns. The supervisor can then enter new dates for both of those as needed. Clicking Save will commit the changes, clicking Cancel will close the editing boxes and return to the default mode.

Checking the checkbox next to date field will mark date of Certificate as Exempt. Leave textbox blank if date is unknown.

Email column entries allow the supervisor to send email to that particular instructor.

Send Bulk Email
The Send Bulk Email link at the bottom of the table will bring up an email client window with the “To:” field filled out with all unique email addresses that are blank or expired in the CPR/First Aid and Pathogens columns. The title is defaulted to “ProCert,” but it can be changed and the message body filled out by the supervisor.
My Account
Here is where a logged in user will maintain their account. User name, account type and assigned programs are read-only. All other lines are editable.

Reset Password
Clicking this button will reset the user's account. This means a new password and three new security question/answer pairs need to be set.