Staff / Instructor Certifications

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Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review **User Permissions for Certifications**.

Jackrabbit understands that keeping staff certification records up to date plays an important role in your business. The Staff Certifications feature streamlines this process for you.

Ensure students are protected by keeping staff certifications current.

Maintain historical reporting; expired certifications are not overwritten and remain in the staff record.

Monitor certification alerts from the Executive Dashboard.

The first step for Staff Certifications is to **add new certification drop-down values**.

Expand/Collapse All

Create and Manage Certification Drop-down Values

Add New Certification Drop-down Values

Determine which certifications are needed for your business and add the drop-down values. These values will display as options in the drop-down list when adding new certifications to a staff member (*Staff* record). There is no limit to the number of certification drop-downs you can add.

To add a certification drop-down value:

1. Go to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu) and choose **Certifications** (*Staff* section).
2. Click **+Add Row** and add the **Certification Name.**
3. Select **Required** (if applicable), and the **Expiration Time Frame** in months (up to 60 months/5 years).
   Note: A *Certification Name* cannot be used more than once. You will be prompted to change the name.

4. Click **Save Changes**.

Edit a Certification Drop-down Value

There may be instances when you have to make changes to a certification requirement. For example, change an *Expiration Time Frame* from 12 months to 24 months.

1. Go to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu) and choose **Certifications** (*Staff* section). and update the certification as needed.
   Note: These edits will change all existing certifications in staff records. Existing certifications' *Name*, *Type* (required or not),*Status*, and *Expires On* fields will be updated.
2. Click **Save Changes** when done.

Delete Certification Drop-down Value

Give careful consideration when deleting a Certification drop-down value.

1. Go to the **Gear** (icon) > **Settings** > **General** > **Drop-down Lists** (left menu) and choose **Certifications** (*Staff* section).
2. Click **Delete.**
3. Click **Save Changes** when done.

> **IMPORTANT!** Once removed, a deleted drop-down value will no longer be available in the system, and any history of the certification in your staff records will be deleted.

Work with Staff Certifications

There are a few different ways to access the certifications.

- Go to the **Staff** (menu) > **Active Staff** and select a staff member. Select the**Certification** tab. The staff member's certificates are listed.
- We recommend this preferred method: Go to the**Staff** (menu) > **Certifications,** all staff members are displayed in the grid. This allows you to review and work with all of your staff's certificates on a single page!

Use the link (top right) or action icons for the following:

- **Manage Certifications** - use the quick link to go to the*Drop-down List Editor*, where you can add or make changes to certification drop-down values. Changes made will update all existing certifications in all staff records.
- **Adjust Columns** - click *Adjust columns > Squeeze grid* to view the entire grid on the page.
- **Send Message** - use the*Send Message (icon)* to generate email reminders to selected staff members when certifications are due. ***Note:*** To email all staff members, leave the checkboxes in the first column of the grid unselected.

- **Refresh the data** - click the *Refresh Grid (icon)* to refresh the data in the grid.
- **Add New Certificate** - click the *Add New Certificate (icon)* to open a *New Certificate* window and add a new individual certificate for a staff member.
- **Export data** - leave all checkboxes in the 1st column unchecked and click the *More (icon)* to export the data in the grid to Excel.

Additional actions can be completed in the grid:

- Move and sort columns in the grid. Refer to **Work with Reports - Grid Style** for more details on how easy and flexible the grids are to work with.
- Edit or delete individual staff certificates from the *Row Menu (icon)* in the 2nd column.
- Edit an *Incomplete* certification for a staff member. Add the *Certified On* date to remove the *Incomplete* status.
- Click on a staff member's name to access their individual certifications (*Staff* record > *Certifications* tab).
  Note: In the *Notes* column in the staff record: "***Legacy Date= xxxxxxxxx***" indicates certifications existing prior to December 2019 and have been migrated to the grid format. These certificates will display as *Incomplete* for required certificates under *Cert Status* because they need to be updated with a *Certified On* date.

The status of each certificate is listed in the *Cert Status* column:

Cert Status	Description
Incomplete	A required certification with no *Certified On/Expired On.*
Current	Based on the *Expires On* date, this certification is up to date.
Due (30 days)	Based on the *Expires On* date, this certification will be overdue in the next 30 days.
Overdue	Based on the *Expires On* date, this certification is overdue and needs to be updated.
Expired	This certificate has been replaced by a newer version.

When a staff member re-certifies, **DO NOT** delete or edit their outdated certificate, instead, add a new certificate with the new **Certified On** date; the status of the old certificate will show as **Expired.** This allows you to retain the history.

Executive Dashboard Certification Alerts

Certifications that are coming due in the next 30 days or are currently overdue are listed in the *Alerts* section on the *Executive Dashboard*. Click on the alert to go to the *Staff Certifications* page, where you can view certification details and send a reminder to staff members to update their certifications.

When a staff member re-certifies, **DO NOT** delete or edit their outdated certificate, instead, add a new certificate with the new **Certified On** date; the status of the old certificate will show as **Expired.** This allows you to retain the history.