ACA INSTRUCTORS & TRAINERS

COURSE MANAGEMENT SYSTEM

User Guide

Dashboards, Credentials and Alerts

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Preface

This user guide describes the automated CMS processes for initiating, validating, documenting and distributing credentials in support of the ACA instructor community. The scope includes certifications, endorsements and assessments.   It also covers the automated alerts used to provide oversight of these processes.

The capabilities described here:

- Provide nearly instantaneous availability of credentials once all requirements have been met.

- Eliminate the manual effort required to review and issue credentials.

- Eliminate the costs associated with the printing and mailing of credentials.

- Provide enhanced transparency and visibility into the credentialing process.

- Reduce the effort required by instructors, ITs and ITEs to renew their credentials.

Note: If there are conflicts between the contents of this user guide and the SEIC Policy Manual, the SEIC Policy Manual is the governing authority.

Dashboards

Dashboards are the first page members see when logging into the Course Management System (CMS). They provide a quick summary of membership and credential status as well as activities that require a member's attention. The links in Dashboards provide shortcuts to items relevant to a member without having to go through the CMS main menu. Dashboards have five sections. Each section is described below.

A.1 Your Member Action Alerts – This section of the Dashboard lists action items related to courses a member has taken or certifications a member holds with links to pages where follow up action can be taken. For example, if a member has taken and passed a certification course, but has not yet completed a course evaluation, an action item will be listed in this section along with a link to the appropriate course evaluation form.

Member Action Alerts

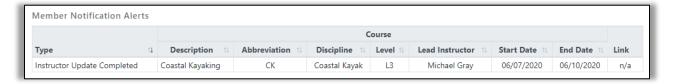| Type | Course | | | | | | | Link |
	Description	Abbreviation	Discipline	Level	Lead Instructor	Start Date	End Date	
Course Evaluation Due	Essentials of River Kayaking	ERK	River Kayaking	L2	Holly Orr	05/27/2020	06/26/2020	Course Evaluation
Cert/End Pending First Aid Credential	Essentials of River Kayaking	ERK	River Kayaking	L2	Holly Orr	05/27/2020	06/26/2020	Member Documents
Cert/End Pending CPR Credential	Essentials of River Kayaking	ERK	River Kayaking	L2	Holly Orr	05/27/2020	06/26/2020	Member Documents

For a complete list of action alerts that may appear in this section of the Dashboard refer to Topic G.1 Member Action Alerts.

A.2 Your Member Notification Alerts – This section of the Dashboard lists member related notification alerts with links to additional supporting information. In general, these alerts are for information only and reflect actions already taken.

Member Notification Alerts

| Type | Course | | | | | | | Link |
	Description	Abbreviation	Discipline	Level	Lead Instructor	Start Date	End Date	
Instructor Update Completed	Coastal Kayaking	CK	Coastal Kayak	L3	Michael Gray	06/07/2020	06/10/2020	n/a

For a complete list of member notification alerts that may appear in this section of the Dashboard refer to Topic G.3: Member Notification Alerts.

A.3 Your Course Alerts – This section of the Dashboard lists alerts related to courses a member has led with links to additional supporting information. These alerts require action by the course lead or by the headquarters staff on the course lead's behalf.

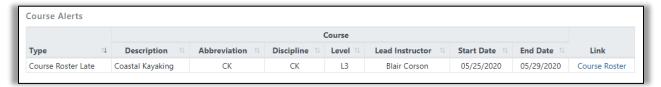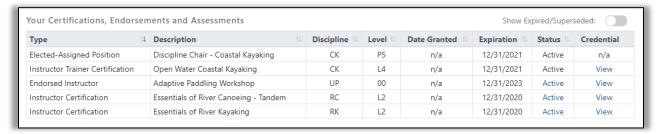| Course Alerts								
			Course					
Type ⇅	**Description** ⇅	**Abbreviation** ⇅	**Discipline** ⇅	**Level** ⇅	**Lead Instructor** ⇅	**Start Date** ⇅	**End Date** ⇅	**Link**
Course Roster Late	Coastal Kayaking	CK	CK	L3	Blair Corson	05/25/2020	05/29/2020	Course Roster

For a complete list of course alerts that may appear in this section of the Dashboard refer to Topic G.5 Course Alerts.

A.4 Your Certifications, Endorsements and Assessments – This section of the Dashboard lists a member's credentials including certifications, endorsements and assessments. If a member has been elected to a position within the SEIC, e.g. Discipline Chair, or appointed to a position, e.g. National Office staff, that carries special access permissions within the CMS, that position will be listed here as well.

Your Certifications, Endorsements and Assessments							Show Expired/Superseded: ⬤
Type ⇅	**Description** ⇅	**Discipline** ⇅	**Level** ⇅	**Date Granted** ⇅	**Expiration** ⇅	**Status** ⇅	**Credential**
Elected-Assigned Position	Discipline Chair - Coastal Kayaking	CK	P5	n/a	12/31/2021	Active	n/a
Instructor Trainer Certification	Open Water Coastal Kayaking	CK	L4	n/a	12/31/2021	Active	View
Endorsed Instructor	Adaptive Paddling Workshop	UP	00	n/a	12/31/2023	Active	View
Instructor Certification	Essentials of River Canoeing - Tandem	RC	L2	n/a	12/31/2020	Active	View
Instructor Certification	Essentials of River Kayaking	RK	L2	n/a	12/31/2020	Active	View

Credential – Clicking on a link in the "Credential" column will allow a member to view a current credential package. Depending on the credential type, one or more documents may be included in a package. A window will open that displays the documents in the package. An "Export to PDF" button will allow a PDF file containing all of the documents in the package to be downloaded and printed.

> Tip: Credential packages are linked to courses in the Curriculum Table under the Policy Tables main menu selection. While this structure allows for unique credential packages for each course, there are typically a few basic package formats in use at any one time.

Status – A credential can have one of several statuses as reflected in the "Status" column.

- Pending – This status applies to new instructor certifications only. It appears when an Instructor candidate has successfully completed a certification course, for example ICE or ICW, but one or more of the other pre-requisites to becoming an Instructor has not been met. Clicking on "Pending" will open a window with additional details and links to resolving the action items. See Topic B.7: Status – New Instructor Certification for additional details.

- Active – This status applies to all certifications, endorsements and assessments that have met and continue to meet all of the requirements for the credential.
    ◦ For Instructor certifications, the "Active" status can be clicked to view the member's progress towards renewing the certification. See Topic B.8: Status – Instructor Renewal for additional details.

    ◦ For IT certifications, the "Active" status can be clicked to view the member's progress towards renewing the IT certification. See Topic C.8: Status – IT Renewal for additional details.

    ◦ For ITE certifications, the "Active" status can be clicked to view the member's progress towards renewing the certification. See Topic D.8: Status – ITE Renewal for additional details.

    ◦ For endorsements, the "Active" status can be clicked to view the certifications underlying the endorsement and progress towards meeting the teaching requirements for renewal (only AP, AC and SUP Yoga endorsements). See Topic E.7: Status – Endorsement Renewal for additional details.

- Inactive –If a credential was valid at one time, but one of the underlying requirements has expired, the credential's status will change from "Active" to "Inactive". The "Inactive" status can be clicked to view the pre-requisites that are no longer current. A course can be registered by a course lead with an inactive credential, but course rosters cannot be created or submitted.   Also, a credential package will not be available for an inactive credential until the underlying requirement(s) are current.

- Expired – The certification, endorsement and assessment sections later in this guide explain the processes for expiring a credential. The "Expired" status on the Dashboard can be clicked to view additional details.

- Superseded – The Superseded status applies only to certifications. The basic premise is that an Instructor can earn a certification that includes all of the privileges of a current certification, but also includes higher level privileges. These privileges typically relate to the courses the Instructor is authorized to lead. For example, a L3 Instructor Trainer certification supersedes a L3 Instructor certification. Note that if a certification is both Inactive and Superseded, the Inactive status will take precedence.

- Not Applicable (n/a) – Assessments do not typically expire or have renewal requirements, so the entry in the Status column for assessments is usually "n/a". See Topic F.5 Assessment Expirations for exceptions.

Show Expired/Superseded – The "Show Expired/Superseded" toggle allows a member to view expired and superseded credentials. To reduce clutter on Dashboards, the default setting is off, that is with the toggle moved to the left. To view expired and superseded credentials, drag the slider to the right. The criteria for expiring credentials is described later in this guide under Certifications, Endorsements and Assessments.

A.5 Your Dues and Credentials – This section of a Dashboard provides the status of third party credentials and ACA dues. Links in each entry lead to web pages where expired credentials can be updated. All of these entries, except SafeSport, must be current for ACA Instructors. The Membership Dues entry applies to both basic membership and SEIC dues.

Your Dues and Credentials			
Type	Expiration	Status	Link
CPR Credential	09/23/2021	Active	Member Documents
First Aid Credential	01/19/2020	Expired	Member Documents
SafeSport Training	02/03/2021	Active	Member Documents
Membership Dues	08/27/2021	Active	ACA Membership

See the Course Registration and Reporting User Guide, link, for information on uploading third party credentials and links for paying ACA member and SEIC dues, link.

A.6 Credential Awarding Process – The CMS follows a specific process in awarding ACA credentials. It is helpful to understand this process when reading the remainder of this user guide. The process includes the following basic steps:

1. For instructor certifications, endorsements and assessments (i.e. not IT and ITE certifications), the process begins with the submission of a completed course roster.

2. If the roster includes a participant role that should result in a certification, endorsement or assessment, the CMS ensures that all prerequisites for the award have been met. Note that this step excludes verifying pre-requisites for taking certain instructor certification courses, such as an assessment course before taking a certification course which has certain level of assessment prerequisites.

3. If all prerequisites have not been met, the member is notified via alerts with helpful links, so that the open issues can be resolved. The credential is added to the member's Dashboard in a "Pending" status with a link to a page summarizing the status of certification prerequisites.

4. Once all prerequisites have been met, the credential's status is changed to "Active".

5. Clicking on "Credential" in the Dashboard allows a member to view the credential package online and download a PDF version for printing and saving on a local device (i.e. PC, tablet or smartphone).

6. During the life of the credential, the CMS will monitor the requirements underlying the credential.

7. If an underlying requirement (e.g. dues payment) expires, the credential will be put in an "Inactive" status until the issue is resolved. Clicking on "Status" will summarize the underlying requirements and indicate which requirement(s) are not current.

8. During the life of a credential with maintenance requirements (e.g. courses taught), including extensions, the CMS will monitor the requirements and automatically renew or expire the credential as appropriate. Expiration dates will always be on a yearend (12/31/xxxx of each year).

The following three sections in the guide provide additional detail on each step in this process for certifications, endorsements and assessments.

Note that certifications for Instructor Trainers and Instructor Trainer Educators follow a process that cannot be fully automated in the CMS. While the CMS can be useful in gathering course and performance data for applications and renewals, it does not fully automate these processes. Formal approval and renewal of IT and ITE certifications must be completed by the SEI Department.

Instructor Certifications

Instructor certification processing in the CMS includes initial certifications, upgrades and renewals.

B.1 Initiation – Certification processes are initiated by one of the following events:

- Successful completion of an ICE or ICW course in a Candidate, CAND, role.

- Successful completion of an ICE or ICW in an Upgrade, UGIN, role.

- Successful completion of an ICE or ICW in a Cross Discipline, CDIN, role.

- Successful completion of an IDW, ICW, ICE or IUD course in an Updating, UDIN, role (renewal).

B.2 Basic Validation – New certifications will be placed in a pending status until the following are verified:

- Current first aid – the uploading of a current credential will release a hold, if one exists

- Current CPR – the uploading of a current credential will release a hold, if one exists

- Current membership dues – payment of dues in the Membership Management System will release a hold, if one exists

- Current age at least 18 – membership profile must include date of birth (members can record their birthdate by logging into their general ACA membership profile)

- Completed course evaluations – completion of the course evaluation related to the certification course will release a hold, if one exists

B.3 Renewal Validation – Instructor certification renewals will not occur until the following additional criteria are verified for the full 4 year certification period prior to certification expiration:

- The instructor has completed a formal Instructor update course, course type UPD, in the appropriate discipline, at their highest level of certification, OR;

- The instructor has taken (in an updating instructor role, UDIN) or co-taught (in an assisting instructor role, ASIN) an IDW, ICE or ICW in their discipline at their highest level of certification with the IT or ITE recording an "Updated" result, OR;

- The instructor has co-taught a skills course (in an assisting instructor role, ASIN) at their highest level of certification with a supervising IT or ITE and completed a review of ACA policies and procedures under the direction of the supervising IT/ITE as indicated by inclusion of the instructor on a submitted course roster, AND;

- The instructor has taught at least two courses in the appropriate discipline with at least one of the courses being at the instructor's highest level of certification in the discipline, AND;

- The instructor's membership dues, first aid and CPR expiration dates are past the expiration date of the certification being updated.

Once all of the above requirements, basic and renewal, have been met for an instructor renewal, the CMS will automatically extend the certification expiration date by four full years.

Note: The automatic awarding of certifications, endorsements and assessments can be temporarily placed on "Pause", if there is a need to manually review the CMS' recommendations on awards.

B.4 Alerts – To assist instructor candidates and renewing instructors in monitoring their progress towards certification or renewal, the following alerts are included in their Dashboards:

- Course Evaluation Due – A course evaluation alert will be created when a roster is submitted with a link to the appropriate course evaluation form. The alert will be automatically removed when the related course evaluation is submitted.

- Instructor Certification Course Completed – A course completion alert triggered by the successful submission of an ICE or ICW course roster with their name in a CAND, CDIN or UGIN role.

- New Instructor Certification – An alert triggered when all requirements for a new certification have been met and the certification has been approved. A new instructor certification will also appear in the "Your Certifications, Endorsements and Assessments" section of a member's Dashboard.

- Instructor Update Completed – A course completion alert triggered by the successful submission of an IDW, ICE, ICW or IUD course roster with their name in a UDIN role.

- Instructor Certification Renewal – An alert triggered when all requirements for a certification renewal have been met and the renewal has been approved. The granted and expiration dates for the certification in the "Your Certifications, Endorsements and Assessments" section will also be updated.

Each of these alerts will include a link to the page in Topic B.7: Status – New Instructor Certification, or the page in Topic B.8: Status – Instructor Renewal, with detail status on the prerequisites for granting the sought certification or renewal. See Section G: Alerts for additional information.

B.5 Dashboards – Active, inactive, expired and superseded certifications appear on member Dashboards in the "Your Certifications, Endorsements and Assessments" section with "Status" and "Credential" links.
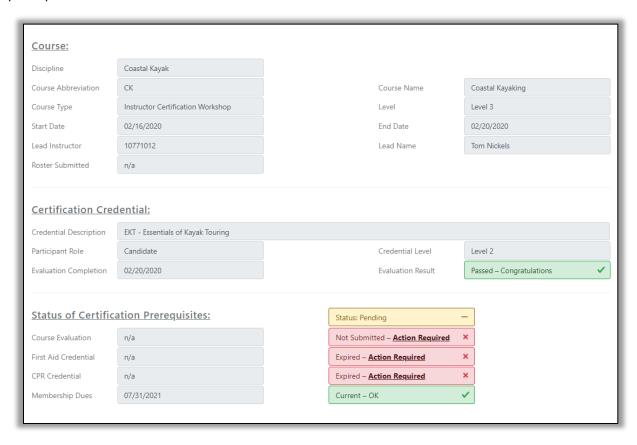
- Active – a certification where all requirements have been met. A "Status" link is available to view all underlying requirements and progress towards renewing the certification. See Topic B.8: Instructor Renewal.

- Inactive – a certification that has not yet expired, but one or more of the underlying requirements are not current. A "Status" link will be available to view all underlying requirements. See Topic B.8: Instructor Renewal.

- Expired – a certification where the current date is past the expiration date of the certification. A "Status" link is available to view all underlying requirements. See Topic B.8: Instructor Renewal.

- Superseded – a certification that has been superseded by a higher level Instructor, IT or ITE certification in the same discipline. Maintenance requirements for superseded certifications are monitored and will be changed to "Expired" when appropriate. Alerts are not created for superseded certifications. The toggle on the Dashboard to hide Expired credentials will also hide Superseded credentials.
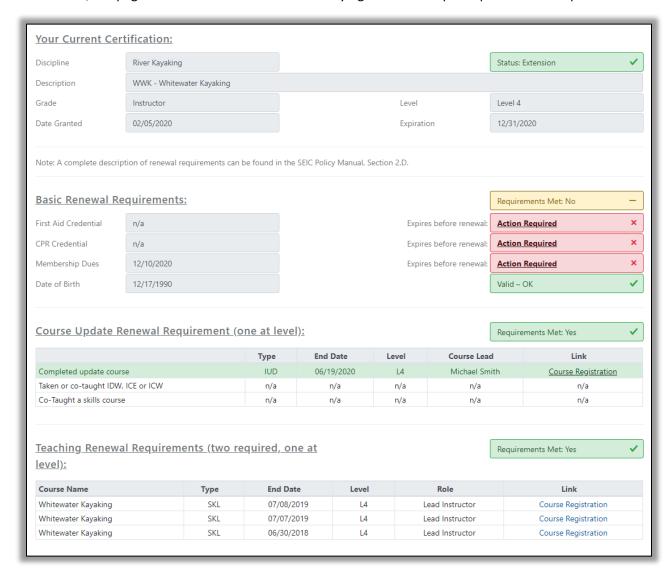
Show Expired/Superseded: ⊘

B.6 Expirations – All certifications expire on a yearend date, that is midnight on 12/31/xxxx.

- The CMS computes expiration dates using the last day of the course or activity that granted the certification as a starting point. This rule applies to initial certifications, upgrades and cross-discipline certifications.

- The duration of certifications is based on the number of full years assigned to the certification in the Curriculum Table. For example, if a CK EKT ICE is completed on June 15, 2020, the expiration date for the certification is 12/31/2024.

- The expiration date is automatically extended for four years, if the instructor meets all of the basic and renewal requirements prior to the expiration date.

- If an Instructor feels that they will not meet all of the basic and renewal requirements, they may request a 12 month administrative extension from the SEI Department to meet these requirements. If their membership is current and the extension is granted, the SEI Department will post the extension to their CMS member profile. The extended expiration date will be 12 months from the previous expiration date (12/31/xxxx).

- If an Instructor does not meet the basic and renewal requirements during the 12 month extension period, they must during the next 6 months complete, at a minimum, an ICE at their highest level of certification to qualify for a renewal. An instructor update course will no longer be sufficient. The participant role on the course roster should be CAND, not UDIN, to reflect the fact that the IT should apply all of the evaluation criteria expected of an Instructor Candidate. All other requirements for renewal still apply. See SEIC Policy Manual, Section 2.D. and Section 5.B.

- If a certification lapses for more than 18 months, a lapsed instructor must complete an IDW/ICE or ICW in a CAND role. See SEIC Policy Manual, Section 5.B.

- If a certification is renewed during the extension period, the new expiration date is four years from the extended expiration date.

B.7 Status – New Instructor Certification – If a new instructor certification is held in a "Pending" status, clicking on "Pending" will open this page which will indicate the prerequisites that have not yet been met, with links to pages were the prerequisites can be resolved. See Topic B.2 for a description of prerequisites.

<u>Course:</u>

Discipline	Coastal Kayak		
Course Abbreviation	CK	Course Name	Coastal Kayaking
Course Type	Instructor Certification Workshop	Level	Level 3
Start Date	02/16/2020	End Date	02/20/2020
Lead Instructor	10771012	Lead Name	Tom Nickels
Roster Submitted	n/a		

<u>Certification Credential:</u>

Credential Description	EKT - Essentials of Kayak Touring		
Participant Role	Candidate	Credential Level	Level 2
Evaluation Completion	02/20/2020	Evaluation Result	Passed – Congratulations ✓

<u>Status of Certification Prerequisites:</u>   Status: Pending —

Course Evaluation	n/a	Not Submitted – **Action Required** ✕
First Aid Credential	n/a	Expired – **Action Required** ✕
CPR Credential	n/a	Expired – **Action Required** ✕
Membership Dues	07/31/2021	Current – OK ✓

B.8 Status – Instructor Renewal – If an instructor has an active certification, clicking on the "Active" status link in the status column on the Dashboard will open the page below. The page reflects the instructor's progress towards renewing a certification. If a certification has been changed from "Active" to "Inactive", the page will indicate which of the underlying certification prerequisites have expired.

Your Current Certification:

Discipline	River Kayaking		Status: Extension ✓
Description	WWK - Whitewater Kayaking		
Grade	Instructor	Level	Level 4
Date Granted	02/05/2020	Expiration	12/31/2020

Note: A complete description of renewal requirements can be found in the SEIC Policy Manual, Section 2.D.

Basic Renewal Requirements: Requirements Met: No —

First Aid Credential	n/a	Expires before renewal:	**Action Required** ✕
CPR Credential	n/a	Expires before renewal:	**Action Required** ✕
Membership Dues	12/10/2020	Expires before renewal:	**Action Required** ✕
Date of Birth	12/17/1990		Valid – OK ✓

Course Update Renewal Requirement (one at level):   Requirements Met: Yes ✓

	Type	End Date	Level	Course Lead	Link
Completed update course	IUD	06/19/2020	L4	Michael Smith	Course Registration
Taken or co-taught IDW, ICE or ICW	n/a	n/a	n/a	n/a	n/a
Co-Taught a skills course	n/a	n/a	n/a	n/a	n/a

Teaching Renewal Requirements (two required, one at level):   Requirements Met: Yes ✓

Course Name	Type	End Date	Level	Role	Link
Whitewater Kayaking	SKL	07/08/2019	L4	Lead Instructor	Course Registration
Whitewater Kayaking	SKL	07/07/2019	L4	Lead Instructor	Course Registration
Whitewater Kayaking	SKL	06/30/2018	L4	Lead Instructor	Course Registration

Instructor Trainer Certifications

Instructor Trainer certification processing in the CMS includes initial certifications and renewals.

C.1 Initiation – The initiation of new Instructor Trainer certifications does not begin within the CMS. The first step in the process is an offline submission of an Instructor Trainer Candidate (ITC) registration form to the SEI Department, link.

While the entire process cannot be monitored within the CMS, the system does record teaching and credential prerequisites. The tracking of progress can be initiated by the SEI Department (August 2020 release).

For additional information on the IT certification and renewal processes, refer to the SEIC Policy Manual, Chapter 3.

C.2 Initial Certification Validation – ITC certification registrations that are in an "In Process" status will track the following requirements until a certification is granted (or the candidate withdraws their candidacy):

- Current first aid – with link to the credential. Uploading of a current credential will release a hold, if one exists.

- Current CPR – with link to the credential. Uploading of a current credential will release a hold, if one exists.

- Current membership dues – with link to payment status. The payment of dues, including SEIC dues, in the Membership Management System will release a hold, if one exists.

- Current age at least 21 – membership profile must include date of birth.

- Has been an Instructor in the appropriate discipline for at least two years. (Date of initial instructor certification displayed on the status page.)

- Has taught and properly reported at least two skills courses at the appropriate level of certification within the last four years.

- Completed Co-Teach, COIN – links will be available to the following documents in the CMS if available:
  ◦ Course Registration
  ◦ Course Roster in a submitted status
  ◦ ITC evaluation completed by the supervising IT/ITE using the ITC candidate template
  ◦ Instructor candidate evaluations written, at least in part, by the ITC
  ◦ Course evaluations written by the instructor candidates using the ITC course template

  Note: ITC registrations will need to be approved by the SEI Department before an instructor can be added to a roster in a COIN or LDIN role (August 2020 release).

- Completed Lead Teach, LDIN – links will be available to the following documents in the CMS, if available:
  ◦ Course Registration
  ◦ Course outline (submitted separately, not in the CMS)
  ◦ Course Roster in a submitted status
  ◦ ITC evaluation completed by the supervising IT/ITE using the ITC candidate template
  ◦ Instructor candidate evaluations written by the ITC
  ◦ Course evaluations written by the instructor candidates using the certification course template

Note that additional requirements not processed by the CMS must be completed successfully before an IT certification can be awarded. The posting of a new IT certification by the SEI Department will deactivate the following Alerts:

- ITC Registration

- ITC Co-Teach Completed

- ITC Lead Teach Completed

C.3 Renewal Validation – IT certification renewals will not occur until the following criteria are verified for the full 4 year certification period prior to certification expiration:

- Maintenance of first aid, CPR, ACA and SEIC dues

- Participation in an Instructor Trainer Update, OR

- Co-teaching of an IDW and ICE with another IT, OR

- Assist teaching of an ITDW in lieu of an IT Update

- Teaching of a minimum of four properly reported courses to include: one IDW/ICE at the highest level of certification, one Update, and one skills or assessment course with the remaining courses at the IT's discretion

Once all of the above requirements have been met for an IT renewal, the CMS will automatically extend the certification expiration date by four full years.

C.4 Alerts – To assist ITCs in monitoring their progress towards receiving a certification or renewal, the following alerts are included in Dashboards:

- ITC Registration – An alert triggered by an ITC registration form submission and approval by the SEI Department.

- ITC Co-Teach Completed – A course completion alert triggered by the successful submission of an IDW/ICE or ICW course roster with an ITC in a COIN role. The alert will include a link to the page in Topic C.7 New IT Certification, with detail status on the prerequisites monitored by the CMS for granting the sought after certification.

- ITC Lead Teach Completion – A course completion alert triggered by the successful submission of an IDW/ICE or ICW course roster with an ITC in a LDIN role. As noted in the previous alert, there will be a link to the New IT Certification status page.

- New IT Certification – An alert triggered by the posting of a new IT certification by the SEI Department. A new IT certification will also appear in the "Your Certifications, Endorsements and Assessments" section of a member's Dashboard.

- IT Certification Renewal – An alert triggered when all requirements have been met for an IT certification renewal and the renewal has been approved. A link in the alert will lead to page with the underlying support. See Topic C.8: Status – IT Renewal for an image of the status page.

- Expired IT Certification – An alert triggered by the expiration of an IT certification. See Topic C.6: Expirations for additional details. See also Topic C.8: Status – IT Renewal for an image of the status page.

C.5 Dashboards – Active, inactive, expired and superseded certifications appear on member Dashboards in the "Your Certifications, Endorsements and Assessments" section with "Status" and "Credential" links.

- Active – a certification where all requirements have been met. A "Status" link is available to view all underlying requirements and progress towards renewing the certification. See Topic C.8 IT Renewal.

- Inactive – a certification that has not yet expired, but one or more of the underlying requirements are not current. A "Status" link is available to view all underlying requirements. See Topic C.8 IT Renewal.

- Expired – a certification where the current date is past the expiration date of the certification. A "Status" link is available to view all underlying requirements. See Topic C.8 IT Renewal.

- Superseded – a certification that has been superseded by a higher level IT or ITE certification in the same discipline. Maintenance requirements for superseded certifications are monitored and will be changed to "Expired" when appropriate. Alerts are not created for superseded certifications. The toggle on the Dashboard to hide Expired credentials will also hide Superseded credentials.

C.6 Expirations – All IT certifications expire on a yearend date, that is midnight on 12/31.

- The CMS computes expiration dates using the day an IT certification is approved or renewed as the certification starting point.

- The duration of certifications is four full years. For example, if a CK EKT ITC is approved for certification on June 15, 2020, the expiration date for the certification is 12/31/2024.

- The expiration date is automatically extended for four years, if the IT meets all of the requirements for renewal prior to the expiration date. See Topic C.3 Renewal Validation.

- If an IT feels that they will not meet all of the renewal requirements, they may request a 12 month administrative extension from the SEI Department to meet these requirements. If their membership is current and the extension is granted, the SEI Department will post the extension to their CMS member profile. The extended expiration date will be 12 months from the previous expiration date.

- If an IT does not meet the renewal requirements during the 12 month extension period, their IT certification will expire. However, if a superseded Instructor certification has not yet expired, that certification will then become active.

- If an IT certification is renewed during the extension period, the new expiration date is four years from the extended expiration date.

C.7 Status – New IT Certification – If a new IT certification is in process, clicking on one of the alert links mentioned in Topic C.4 Alerts will open this page to reflect the status of the requirements monitored by the CMS. See Topic C.2 Initial Certification Validation for additional detail.

Note: This page will be available in the August 2020 release.

C.8 Status – IT Renewal – If an IT has an active, inactive or expired certification, clicking on the link in the status column on the Dashboard will open the page below. The page reflects the instructor's progress towards renewing a certification. If a certification has been changed from "Active" to "Inactive", the page will indicate which of the underlying certification prerequisites have expired.

Note: This page will be available in the August 2020 release.

Instructor Trainer Educator Certifications

Instructor Trainer Educator certification processing in the CMS includes initial certifications and renewals.

D.1 Initiation – The initiation of new Instructor Trainer Educator certifications does not begin within the CMS. The first step in the process is an offline submission of an Instructor Trainer Educator (ITE) application form to the SEI Department.

While the entire process cannot be monitored within the CMS, the system does record teaching and credential prerequisites. The tracking of progress can be initiated by the SEI Department (August 2020 release).

For additional information on the ITE certification and renewal processes, refer to the SEIC Policy Manual, Chapter 4.

D.2 Initial Certification Validation – ITE certification applications that are in an "In Process" status will track the following requirements until a certification is granted:

- Current first aid – with link to the credential. Uploading of a current credential will release a hold, if one exists.

- Current CPR – with link to the credential. Uploading of a current credential will release a hold, if one exists.

- Current membership dues – with link to payment status. The payment of dues, including SEIC dues, in the Membership Management System will release a hold, if one exists

- Current age at least 21 – membership profile must include date of birth

- An Instructor Trainer in the appropriate discipline for at least two years. (Date of initial IT certification displayed on the status page.)

- Taught and properly reported at least four courses to include:

  ◦ At least one Skills or Assessment course
  ◦ At least one Instructor Update
  ◦ At least two IDW/ICEs at the highest level of certification

  Note: All IDW/ICEs and Updates taught in the last 2 years are listed on the status page with links to course evaluations.

- Attended an ACA instructional clinic conducted by an IT in another discipline.

  Note: All ACA instructional clinics attended that were conducted by an IT in another discipline are listed on the status page.

- Certifications in other ACA disciplines and endorsements are listed on the status page.

Note that additional requirements not processed by the CMS must be completed successfully before an ITE certification can be awarded. The posting of a new ITE certification by the SEI Department will deactivate the "ITE Application" alert.

D.3 Renewal Validation – ITE certification renewals will not occur until the following criteria are verified for the full 4 year certification period prior to certification expiration:

- Maintenance of first aid, CPR, ACA and SEIC dues

- Taught and properly reported at least six courses to include:

  ◦ At least one Skills and one Assessment course
  ◦ At least one Instructor Update
  ◦ At least one IDW/ICE at the highest level of certification

  Note: All IDW/ICEs and Updates taught in the last 4 years are listed on the status page with links to course evaluations.

- Co-taught at least one course with another IT or ITE

- Certified ITs – list of ITs certified under the ITE's direct supervision are listed on the status page

- Certifications in other ACA disciplines and endorsements will be listed on the status page.

Once all of the above requirements have been met for an ITE renewal, the CMS will send an alert to the SEI Department. The SEI Department will oversee a review of the renewal documentation by the SEIC Standards Committee. If the renewal is approved, the SEI Department will update the ITE certification expiration date.

D.4 Alerts – To assist ITE candidates in monitoring their progress towards receiving a certification or renewal, the following alerts are included in their Dashboards:

- ITE Registration – An alert in the first section of a Dashboard will include a link to the page in Topic D.7: New ITE Certification, that will monitor progress towards fulfilling the requirements for an ITE certification.

- New ITE Certification – An alert triggered by the posting of a new ITE certification by the SEI Department. A new ITE certification will also appear in the "Your Certifications, Endorsements and Assessments" section of a member's Dashboard.

- ITE Renewal – An alert triggered when all requirements have been met for an ITE certification renewal, except SEIC Standards Committee approval.   A link in the alert will lead to the page in Topic D.8: ITE Renewal. This page will include detail support for the renewal.

- Expired ITE Certification – An alert triggered by the expiration of an ITE certification. See Topic D.6 Expirations for additional details. There will be a link to the ITE Renewal status page. The alert will be automatically removed by the posting of an extension or renewal by the SEI Department.

D.5 Dashboards – Active, inactive, expired and superseded certifications appear on member Dashboards in the "Your Certifications, Endorsements and Assessments" section with "Status" and "Credential" links.

- Active – a certification where all requirements have been met. A "Status" link is available to view all underlying requirements and progress towards renewing the certification. See Topic D.8 Status – ITE Renewal.

- Inactive – a certification that has not yet expired, but one or more of the underlying requirements are not current. A "Status" link is be available to view all underlying requirements. See Topic D.8 Status – ITE Renewal.

- Expired – a certification where the current date is past the expiration date of the certification. A "Status" link is available to view all underlying requirements. See Topic D.8 - ITE Renewal.

- Superseded – a certification that has been superseded by a higher level ITE certification in the same discipline. Maintenance requirements for superseded certifications are monitored and will be changed to "Expired" when appropriate. Alerts are not created for superseded certifications. The toggle on the Dashboard to hide Expired credentials will also hide Superseded credentials.

D.6 Expirations – All ITE certifications expire on a yearend date, that is midnight on 12/31/xxxx.

- The CMS computes expiration dates using the day an ITE certification is approved or renewed as the certification starting point.

- The duration of certifications is four full years. For example, if a CK OWCK ITE is approved for certification on June 15, 2020, the expiration date for the certification is 12/31/2024.

- The expiration date is extended for four years, if the ITE meets all of the requirements for renewal prior to the expiration date and is approved by the SEIC Standards Committee. The SEI Department updates the certification expiration date. See Topic D.3: Renewal Validation.

- If an ITE feels that they will not meet all of the renewal requirements, they may request a 12 month administrative extension from the SEI Department to meet these requirements. If their membership is current and the extension is granted, the SEI Department will post the extension to their CMS member profile. The extended expiration date will be 12 months from the previous expiration date.

- If an ITE does not meet the renewal requirements during the 12 month extension period, their ITE certification will expire. However, if a superseded Instructor or IT certification has not yet expired, that certification will then become active.

- If an ITE certification is renewed during the extension period, the new expiration date is four years from the extended expiration date.

D.7 Status – New ITE Certification – If a new ITE certification is in process, clicking the link in the ITE Registration alert will open this page to reflect the status of the requirements monitored by the CMS. See Topic D.2, Initial Certification Validation for additional detail.

<div align="center">Note: This page will be available in the August 2020 release.</div>

D.8 Status – ITE Renewal – If an ITE has an active certification, clicking on the "Active" status link in the status column on the Dashboard will open the page below. The page reflects the ITE's progress towards renewing a certification. If a certification has been changed from "Active" to "Inactive", the page will indicate which of the underlying certification prerequisites have expired.

<div align="center">Note: This page will be available in the August 2020 release.</div>

Endorsements

Endorsement processing in the CMS supports endorsements for certified Instructors, ITs and ITEs.

E.1 Initiation – Endorsement processes are initiated by one of the following events:

- Successful completion of a Skills, SKL, course that offers endorsements to instructors in the same discipline. The participant role must be ENDO. See the END column in the Curriculum Table for Skills courses that offer endorsements.

- Successful completion of an Assessment, ASS, course that offers endorsements to instructors. The participant role must be ENDO. See the END column in the Curriculum Table for courses that offer endorsements to instructors in the "Same" or "Any" discipline.

- Successful completion of an Endorsement, END, course in an ENDO role. See the END column in the Curriculum Table for courses that offer endorsements to instructors in the "Same" discipline.

   Note: Selection of a PART role where an endorsement is possible will create a warning message and a request to confirm. The warning is intended to confirm the intent of the course lead. PART roles do not receive endorsements, even if the course is completed with a Passed result.

E.2 Basic Validation – Endorsements can only be awarded to Instructors, ITs and ITEs whose certifications are current through the end date of the endorsing course. Also:

- The endorsement flag in the Curriculum Table for the endorsing course must be set to "Same" or "Any".

- If the endorsement flag in the Curriculum Table is set to "Same" the Instructor, IT or ITE must be certified in the same discipline as the endorsing course.

- If the endorsement flag in the Curriculum Table is set to "Any" the Instructor, IT or ITE may be certified in any discipline, except Safety & Rescue.

E.3 Alerts – A New Endorsement alert will appear in Member Notification Alerts when an endorsement result is submitted on a course roster.

E.4 Dashboard – Active and expired endorsements appear on member Dashboards in the "Your Certifications, Endorsements and Assessments" section with "Status" and "Credential" links.

- Active – endorsements where the underlying certification is active. The underlying certification may be in the same discipline or another discipline depending on the endorsement flag in the Curriculum Table.

- Expired – endorsements with maintenance requirements that have expired or underlying certifications that have expired.

E.5 Expirations – All endorsements expire on a yearend date, that is midnight on 12/31.
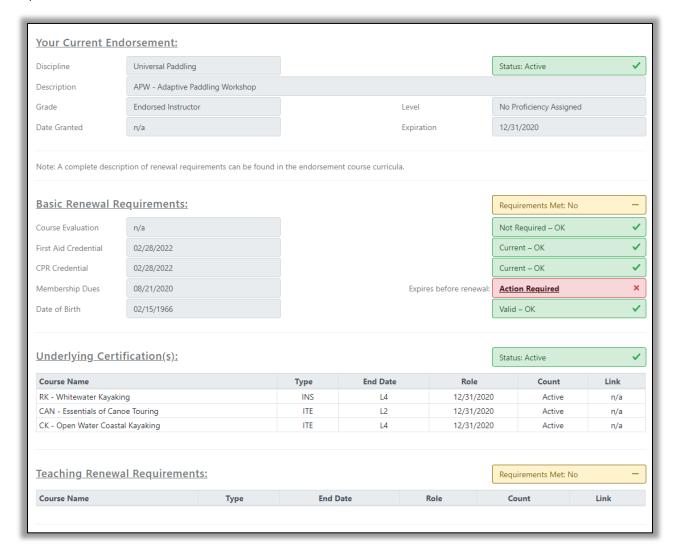
- Endorsements tied to a specific discipline become inactive when the latest certification in that discipline expires. The certification may be for an Instructor, IT or ITE.

- Endorsements not tied to a specific discipline become inactive when the latest certification held by the member expires. The certification may be for an Instructor, IT or ITE.

E.6 Unique Endorsements – The follow endorsements have unique characteristics.

- AP and AC – In addition to the criteria above regarding underlying certifications, Adaptive Paddling and Advanced Communication endorsements have maintenance requirements. At least 2 courses must be taught in each full 4 year period following the granting of the endorsement with at least 1 paddling student with a disability in each course.

  ◦ If the expiration of the endorsement occurs before the expiration of the underlying certification, the endorsement expiration date is the determining date.

  ◦ If the expiration of the underlying certification (including approved extensions, if any) occurs before the endorsement, the certification expiration date is the determining date.

  ◦ A field on course rosters is available to record a count of students with disabilities. It is a total field only, not associated with specific students.

- SUP Yoga – In addition to the criteria above, SUP Yoga endorsements have maintenance requirements in addition to the underlying certifications. At least 2 SUP Yoga courses must be taught in each full 4 year period following the granting of the endorsement.

  ◦ If the expiration of the endorsement occurs before the expiration of the underlying certification, the endorsement expiration date is the determining date.

  ◦ If the expiration of the underlying certification (including approved extensions, if any) occurs before the endorsement, the certification expiration date is the determining date.

  ◦ Validation of Yoga certifications outside of the ACA are not automated.

- AP, AC and SUP Yoga endorsements will be automatically extended when their maintenance requirements are met. However, the expiration dates displayed on Dashboards will not be longer than the underlying certifications. When the expiration dates of the endorsements are sooner than the expiration dates of the underlying certifications, they are displayed.

- Trip leader credentials are endorsements if associated with an instructor in the same discipline, and skills assessments if associated with a non-instructor or an instructor in a different discipline. Assessments are not automatically upgraded to Endorsements if a member becomes an Instructor subsequent to the assessment.

- Camping courses are not automatically endorsements if associated with an Instructor in the same discipline (see note below). They are not skills assessments when taken by non-Instructors, since there are no existing formal camping skills assessment courses. For non-Instructors, these courses will not appear in a member's credentials.

Note: Selection of a PART role for trip leader and camping courses where an endorsement is possible will create a warning message and a request to confirm. The warning is intended to confirm the intent of the course lead. PART roles do not receive endorsements, even if the course is completed with a Passed result.

E.7 Status – Endorsement Renewal – If an instructor has an active endorsement, clicking on the "Active" status link in the status column on the Dashboard will open the page below. The page reflects the certifications underlying the endorsement and the Instructor's progress towards meeting teaching requirements for renewal, if applicable. If a certification has been changed from "Active" to "Inactive", the page will indicate which of the underlying certification prerequisites have expired or teaching requirements not met.

Your Current Endorsement:

Discipline	Universal Paddling		Status: Active ✓
Description	APW - Adaptive Paddling Workshop		
Grade	Endorsed Instructor	Level	No Proficiency Assigned
Date Granted	n/a	Expiration	12/31/2020

Note: A complete description of renewal requirements can be found in the endorsement course curricula.

Basic Renewal Requirements: — Requirements Met: No —

Course Evaluation	n/a		Not Required – OK ✓
First Aid Credential	02/28/2022		Current – OK ✓
CPR Credential	02/28/2022		Current – OK ✓
Membership Dues	08/21/2020	Expires before renewal:	**Action Required** ✗
Date of Birth	02/15/1966		Valid – OK ✓

Underlying Certification(s): — Status: Active ✓

Course Name	Type	End Date	Role	Count	Link
RK - Whitewater Kayaking	INS	L4	12/31/2020	Active	n/a
CAN - Essentials of Canoe Touring	ITE	L2	12/31/2020	Active	n/a
CK - Open Water Coastal Kayaking	ITE	L4	12/31/2020	Active	n/a

Teaching Renewal Requirements: — Requirements Met: No —

Course Name	Type	End Date	Role	Count	Link

Assessments

Assessment processing in the CMS supports skills assessments for all members.

F.1 Initiation – Assessment processes are initiated by the completion of an assessment course, ASS, in a Participant, PART role with a Passed result.

F.2 Basic Validation – Assessments can only be awarded to members whose dues are current. Awards will be Inactive until dues are current.

F.3 Alerts – An Assessment Course Completed alert will appear in Member Notification Alerts when an assessment course is completed with a passing result. If an award is Inactive due to unpaid dues, a link will be available to pay the dues.

F.4 Dashboards – Assessments will appear on member Dashboards with the end date of the course in the "Date Granted" column.

F.5 Expirations – Except for PSF courses, assessments do not have expiration dates. The expiration status on Dashboards will be "Active". Expirations dates will be "n/a". PSF certificates offered to non-instructors expire 1 year from the date of completion of the course. They are non-renewable.

Alerts

The CMS tracks member and course related activities and creates alerts when a member or the ACA office need to be aware of a particular event or activity that requires follow up. Alerts can be found in member Dashboards and through alert queries. Filters and a "Find" feature in alert queries can be used to target specific alert types or groups of related alerts. Links associated with each alert can be used to navigate to a page in the CMS where action can be taken or additional information is available.

There are three alert sections in Dashboards, one section for each alert type.

- Your Member Action Alerts – member related alerts that require follow up action.

- Your Member Notification Alerts – member related alerts that are for information only and do not require follow up action.

- Your Course Action Alerts – course related alerts that usually require follow up action.

Each section only appears if it contains one or more alerts. The three available alert queries can be found under the Alerts main menu selection in the CMS.

G.1 Member Action Alerts – The following are descriptions of the member related alerts created by the CMS that require follow up action.

Course Evaluation Due – An alert sent to an award candidate (participant roles CAND, CDIN, ENDO, PART, UDIN and UGIN) when a course evaluation is due. Course evaluations are optional for PART and UDIN roles and required for the other roles. A link in the alert leads to the appropriate course evaluation form for members and the course roster for all others (i.e. course evaluations with member numbers and names are confidential). The alert is sent on the last day of a course (i.e. at 12:01 am EDT/EST). An additional alert, Cert/End Pending Course Evaluation will be sent for required course evaluations if an award is on hold pending the evaluation.

o   Member Action: complete the course evaluation

o   Staff Action: none, information only

o   Deactivation: automatic when the course evaluation is submitted

Cert/End Pending Course Evaluation – A certification or endorsement is on holding pending the completion of a required course evaluation. A link in the alert leads to the appropriate course evaluation form for members and the course roster for all others (i.e. course evaluations with member numbers and names are confidential). This alert is not triggered by optional course evaluations.

o   Member Action: complete the course evaluation

o   Staff Action: none, information only

o   Deactivation: automatic when the course evaluation is submitted

Cert/End Pending CPR Credential – A certification or endorsement is on holding pending the uploading of a CPR credential that is not expired. A link in the alert leads to the CMS page where a current CPR credential can be uploaded.

o   Member Action: upload a current CPR credential

o   Staff Action: none, information only

o   Deactivation: automatic when a current CPR credential is uploaded

Cert/End Pending First Aid Credential – A certification or endorsement is on holding pending the uploading of a first aid credential that is not expired. A link in the alert leads to the CMS page where a current first aid credential can be uploaded.

o   Member Action: upload a current first aid credential

o   Staff Action: none, information only

o   Deactivation: automatic when a current first credential is uploaded

Cert/End/Ass Pending Membership Dues – A certification or endorsement is on holding pending payment of ACA membership or SEIC dues. A link in the alert leads to the ACA web site page where dues may be paid.

o   Member Action: pay ACA membership and SEIC dues

o   Staff Action: none, information only

o   Deactivation: automatic when dues are paid

Expired CPR Credential – An alert sent on the day after a CPR credential expires. A link in the alert leads to the CMS page where a current CPR credential can be uploaded. If the member has certifications that require a valid CPR credential, the certifications will be moved from an Active to an Inactive status until the expired credential is resolved or the certifications themselves expire.

o   Member Action: upload a current CPR credential

o   Staff Action: none, information only

o   Deactivation: automatic when a current CPR credential is uploaded

Expired First Aid Credential – An alert sent on the day after a first aid credential expires. A link in the alert leads to the CMS page where a current first credential can be uploaded. If the member has certifications that require a valid first aid credential, the certifications will be moved from an Active to an Inactive status until the expired credential is resolved or the certifications themselves expire.

o   Member Action: upload a current first aid credential

o   Staff Action: none, information only

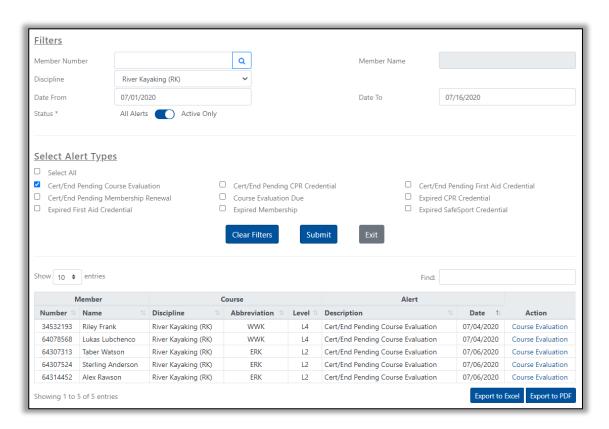o   Deactivation: automatic when a current first credential is uploaded

Expired Membership – An alert sent when a member's dues, including SEIC dues, are overdue. A link in the alert leads to the ACA web site page where dues may be paid. If the member has certifications or endorsements, the certifications or endorsements will be moved from an Active to an Inactive status until the dues are paid or the certifications or endorsements themselves expire.

o   Member Action: pay ACA membership and SEIC dues

o   Staff Action: none, information only

o   Deactivation: automatic when dues are paid

G.2 Member Action Alerts Query – Member related alerts that require follow up action by the member appear in the first section of Dashboards. This section only appears if there are active alerts. They can also be viewed by going to the Alerts main menu selection, then Member Action Alerts. See the image below for a sample of the CMS page that focuses on member related action alerts.

Status – The status slider defaults to "Active Only" alerts. That is, the alerts that have not been deactivated. However, the slider can be set to "All Alerts" to see the active and deactivated alerts that fall within the filter parameters.

Alert Types – The default setting is "Select All". By clicking on this box, all of the checked boxes will be unchecked. You can then select specific alert types, then select "Submit".

G.3 Member Notification Alerts – The following are descriptions of member related notification alerts that are created by the CMS. In general, these alerts are for information only and do not require follow up action.

Completed Assessment – An alert sent when an assessment is successfully completed by a member in a PART role. A link in the alert leads to the course roster where the assessment was earned.   Dues must be curent to receive this alert.

o   Member Action: notification only

o   Staff Action: information only, reflects an automatic or manually approved award

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

Continuation Invitation – An alert received by an IT or ITE when an Instructor Candidate (IC) has invited the IT/ITE to review a continuation and assist with removing some or all of the continued evaluation criteria. The invitation is created and controlled by the IC in the CMS under Candidate Evaluations, then Continuation Invitations. A link in the alert will lead to the Continuation Invitations page. See the Course Registration and Reporting User Guide for additional information.

o   Member Action: notification for IT and ITE

o   Staff Action: information only

o   Deactivation: the continuation is resolved or expires, the invitation is deactivated by the IC, or the alert is deactivated using the "Deactivate" button

Continuation Removal – An alert sent to an Instructor Candidate (IC) when a continuation is removed. The awarding of a certification credential will depend on whether there are other missing prerequisites (e.g. CPR, first aid or dues) for the certification. A link in the alert will lead to the final continuation form in a chain with links to other continuation forms for the same certification.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: deactivated by member selecting the "Deactivate" button on the alert listing

Expired Continuation – An alert sent when a continuation has not been removed within 4 years of a certification course completion. A full ICW or ICE must be successfully completed before the related certification can be awarded. A link in the alert will lead to the continuation form.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

New Instructor Certification – An alert sent to a candidate in a CAND, CDIN or UGIN role with a Pass result. The alert will include a link to a page with detail status on the prerequisites met for granting the certification.

o   Member Action: notification only

o   Staff Action: modify member type in YM

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

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Instructor Update Completed – An alert sent when an IDW, ICE, ICW or IUD course has been completed with an instructor in an UDIN role. The alert will include a link to a page with detail status on the prerequisites for an instructor certification renewal. Note that Instructor renewals require more than the completion of an instructor update course.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

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Instructor Certification Renewal – An alert sent when a instructor certication renewal has been approved and posted to a member's profile. A link in the alert leads to a page with details on the renewal requirments met.

o   Member Action: notification only

o   Staff Action: information only, reflects an automatic or manually approved renewal

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

   Note: Certifications will only renew on their yearend date of 12/31/xxxx.

Expired Instructor Certification – An alert sent when an Instructor Certification expires. A link in the alert leads to a page with details on the renewal requirments not met.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

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New Endorsement – An alert sent to an instructor in a assessment course in an ENDO role or in an endorsement course in a ENDO role with a "Pass" result. The alert will include a link to a page with detail status on the prerequisites met for granting the endorsement.

o   Member Action: notification only

o   Staff Action: information only, reflects an automatic or manually approved award

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

Expired Endorsement – An alert sent when an Endorsement expires for those endorsements with maintenance requirements. A link in the alert leads to a page with details on the renewal requirments in the CMS not met.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

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ITC Registration – An alert sent when the SEI Department records the beginning of an ITC certification process. A link in the alert leads to a page with the detail requirements for IT certification monitored by the CMS. Not all ITC requirements are monitored by the CMS. Note: August 2020 release.

o   Member Action: notification only

o   Staff Action: information only, confirmation that the registration has been recorded

o   Deactivation: IT status granted, IT application abandoned or deactived manually by staff selecting the "Deactivate" button on the alert listing

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ITC Co-Teach Completed – An alert sent when an ITC completes an ITC Co-Teach requirement. A link in the alert leads to a page with the detail requirements for IT certification monitored by the CMS. Not all ITC requirements are monitored by the CMS. Note: link to be added in August release.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

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ITC Lead Teach Completed – An alert sent when an ITC completes an ITC Lead Teach requirement. A link in the alert leads to a page with the detail requirements for IT certification monitored by the CMS. Not all ITC requirements are monitored by the CMS. Note: link to be added in August release.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

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New Instructor Trainer Certification – An alert sent when the SEIC Standards Committee approves a new IT and the SEI Department posts the approval using an MCEM transaction. The alert will include a link to a page with detail status on the prerequisites in the CMS met for granting the certification. Note: link to be added in August release.

o   Member Action: notification only

o   Staff Action: information only, action already taken to post the certification

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

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IT Certification Renewal – An alert sent when the SEIC Standards Committee approves an IT renewal and the SEI Department posts the approval using an MCEM transaction. The alert will include a link to a page with detail status on the prerequisites in the CMS met for granting the renewal. Note: August 2020 release.

o   Member Action: notification only

o   Staff Action: information only, action already taken to post the renewal

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

Expired IT Certification – An alert sent when an Instructor Trainer Certification expires.   A link in the alert leads to a page with details on the renewal requirments in the CMS not met. Note: August 2020 release.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

ITEC Application – An alert sent when the SEI Department records the beginning of an ITE certification process. A link in the alert leads to a page with the detail requirements for ITE certification monitored by the CMS. Not all ITC requirements are monitored by the CMS. Note: August 2020 release.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

New Instructor Trainer Educator Certification – An alert sent when the SEIC Standards Committee approves a new ITE and the SEI Department posts the approval using an MCEM transaction. The alert will include a link to a page with detail status on the prerequisites in the CMS met for granting the certification. Note: link to be added in August release.

o   Member Action: notification only

o   Staff Action: information only, action already taken to post the certification

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

ITE Certification Renewal – An alert sent when the SEIC Standards Committee approves an ITE renewal and the SEI Department posts the approval using an MCEM transaction. The alert will include a link to a page with detail status on the prerequisites in the CMS met for granting the renewal. Note: link to be added in August release.

o   Member Action: notification only

o   Staff Action: information only, action already taken to post the renewal

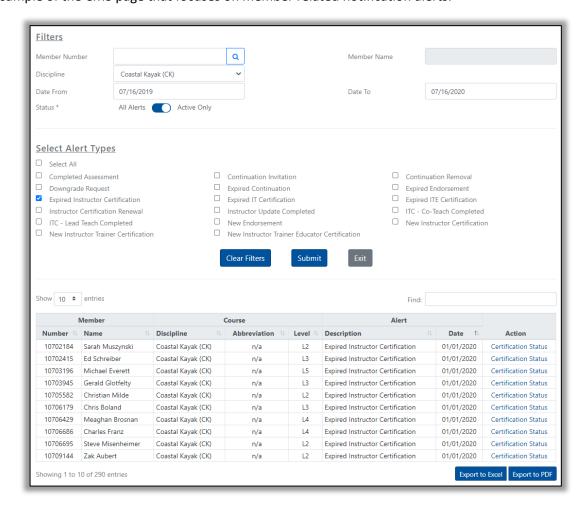o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

Expired ITE Certification – An alert sent when an Instructor Trainer Educator Certification expires.   A link in the alert leads to a page with details on the renewal requirments in the CMS not met. Note: link to be added in August release.

o   Member Action: notification only

o   Staff Action: information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

G.4 Member Notification Alerts Query – Member notification alerts appear in the second section of a member's Dashboard. This section only appears if there are active alerts. They can also be viewed by going to the Alerts main menu selection, then Member Notification Alerts. See the image below for a sample of the CMS page that focuses on member related notification alerts.

Status – The status slider defaults to "Active Only" alerts. That is, the alerts that have not been deactivated. However, the slider can be set to "All Alerts" to see the active and deactivated alerts that fall within the filter parameters.

Alert Types – The default setting is "Select All". By clicking on this box, all of the checked boxes will be unchecked. You can then select specific alert types, then select "Submit".

G.5 Course Alerts – The following are descriptions of the course related alerts that are created by the CMS. The majority of these alerts require follow up action.

Post Course to Calendar – An alert is created when a request is made on a Course Registration to post the course to the ACA web site calendar. The alert will include a link to the Course Registration page.

o   Member Action: none required

o   Staff Action: post course to ACA calendar

o   Deactivation: deactivate button on the course registration is clicked by SEI staff (viewable by permission 7 and above)

Insurance Requested – An alert created when ACA liability insurance is requested on a Course Registration. The alert will include a link to the Insurance Information page for the course.

o   Member Action: none required

o   Staff Action: insuranance certificate requested from insurance company

o   Deactivation: deactivate button on the Insurance Information page is clicked by the ACA Office Insurance Coordinator (viewable by permission 7 and above)

Insurance Information Not Provided – An alert created when ACA liability insurance is requested on a Course Registration and the Insurance Information page has not been completed. The alert will include a link to the Course Registration form.

o   Member Action: provide the requested insurance information

o   Staff Action: follow up on the requested insuranance information from the course lead

o   Deactivation: Insurance Information page is submitted

Calendar Course Dates Changed – An alert is created when dates are changed on a Course Registration page for a course posted to the ACA web site calendar. The alert will include a link to the Course Registration page.

o   Member Action: none required

o   Staff Action: change the course dates on the ACA calendar

o   Deactivation: deactivate button on the course registration is clicked by SEI Department staff (viewable by permission 7 and above)

Insurance Course Dates Changed – An alert is created when the dates of an ACA insured course (not PAC sanctioned events) are changed on the Course Registration page. A link in the alert leads to the Course Registration page.

o   Member Action: none required

o   Staff Action: notify the insurance carrier of the date change

o   Deactivation: deactivate button on the Course Registration page is clicked by the ACA Office Insurance Coordinator (viewable by permission 7 and above)

Calendar Course Cancelled – An alert is created when a course posted to the ACA web site calendar is cancelled on the Course Registration page. A link in the alert leads to the Course Registration page.

o   Member Action: none required

o   Staff Action: remove the course from the ACA calendar

o   Deactivation: deactivate button on the course registration is clicked by SEI staff (viewable by permission 7 and above)

Insurance Course Cancelled – An alert is created when an ACA insured course (not PAC sanctioned events) is cancelled on the Course Registration page. A link in the alert leads to the Course Registration page.

o   Member Action: none required

o   Staff Action: none required

o   Deactivation: deactivate button on the Course Registration page is clicked by the Insurance Coordinator (viewable by permission 7 and above)

Missing Candidate Evaluations – Candidate evaluations are required for course participants in CAND, CDIN, COIN, ENDO, LDTI and UGIN Roles. If required candidate evaluations are not submitted within 30 days of course completion, an alert is created. A link in the alert leads to the Course Roster.

o   Member Action: course lead completes the missing candidate evaluations

o   Staff Action: none required

o   Deactivation: submission of the missing candidate evaluations

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Course Roster Late – By SEIC policy, a course roster must be submitted within 30 days of course completion. An alert is created if a roster is not submitted within the 30 day period. The alert is deactivated when the course roster is submitted. A link in the alert leads to the course roster.

o   Member Action: course lead submits the late roster

o   Staff Action: none required

o   Deactivation: submission of the late roster

Insured Course Completion Information Not Provided – An alert is created when a course covered by ACA liability insurance is completed and a Payment Method has not been selected on the Post Course Insurance Fees page within 30 days of course completion.

o   Member Action: course lead selects a payment method

o   Staff Action: follow up on the requested insurance information from the course lead

o   Deactivation: submission of a payment method.

Missing Liability Waivers – An alert is created if all liability waivers for an ACA insured course (not PAC sanctioned events) are not uploaded within 30 days of course completion. The CMS computes the number of waivers required based on the number of participants on the course roster. A link in the alert leads to the Liability Waiver Upload page for the course.

o   Member Action: course lead uploads the missing liability waivers

o   Staff Action: none required

o   Deactivation: deactivated when the number of waivers uploaded equals the number required

Course Accepted – An alert created when a course has been completed and an EZ Report or a course roster is submitted. The alert serves to confirm to the course lead that the course data has been accepted and the course is now considered to be complete. A link in the alert leads to the Course Registration page. Note: August 2020 release.

o   Member Action: none required, information only

o   Staff Action: none required, information only

o   Deactivation: can be deactivated by member selecting the "Deactivate" button on the alert listing

Insured Course Completed – An alert is created when a course covered by ACA liability insurance is completed. A link in the alert leads to the Post Course Insurance Fees page. The alert is primarily intended as a status update for the ACA Insurance Coordinator who can view the fees due. The alert Deactivation button is located on the Post Course Insurance Fees page and is only visible to permission 7 and above.

o   Member Action: coourse lead pays any required insurance fees

o   Staff Action: determine if all required fees have been paid

o   Deactivation: deactivate button on the Post Course Insurance Fees page is clicked by the Insurance Coordinator (viewable by permission 7 and above)

G.6 Course Alerts Query – Course related alerts appear in the third section of Dashboards for course leads. This section only appears if there are active alerts. They can also be viewed by going to the Alerts main menu selection, then Course Alerts. See the image below for a sample of the CMS page that focuses on course related alerts.

Status – The status slider defaults to "Active Only" alerts. That is, the alerts that have not been deactivated. However, the slider can be set to "All Alerts" to see the active and deactivated alerts that fall within the filter parameters.

Alert Types – The default setting is "Select All". By clicking on this box, all of the checked boxes will be unchecked. You can then select specific alert types, then select "Submit".

<u>Filters</u>

Lead Instructor	[🔍]		Lead Instructor Name	[ ]
Discipline	All ⌄			
Start Date	07/22/2019		End Date	07/22/2020
Status *	All Alerts ⬤ Active Only		Admin Overrides *	Hide ⬤ Show

<u>Select Alert Types</u>

☐ Select All
☑ Insurance Requested   ☐ Insurance Information Not Provided   ☐ Course Roster Late
☐ Missing Candidate Evaluations   ☐ Post Course to Calendar   ☐ Missing Liability Waivers
☐ Insured Course Completed   ☐ Insured Course Completion Information Not   ☐ Insurance Course Dates Changed
                                     Provided
☐ Calendar Course Dates Changed   ☐ Insurance Course Cancelled   ☐ Calendar Course Cancelled

[Clear Filters]   [Submit]   [Exit]

Show [10 ⬍] entries   Find: [ ]

	Course				Alert		
Start Date ⇅	Name ⇅	Abbreviation ⇅	Discipline ⇅	Lead Instructor ⇅	Description ⇅	Date ⇅	Link ⇅
07/11/2020	Essentials of River Kayaking	ERK	River Kayaking (RK)	Daniel Murphy	Insurance Requested	07/02/2020	Insurance Request
07/11/2020	Swiftwater Rescue	SWR	Safety & Rescue (SR)	Golder Goldstein	Insurance Requested	07/05/2020	Insurance Request
07/11/2020	Coastal Kayak: Strokes & Maneuvers Refinement	CK:SMR	Coastal Kayak (CK)	Randi Kruger	Insurance Requested	07/06/2020	Insurance Request
07/12/2020	Essentials of River Kayaking	ERK	River Kayaking (RK)	Randi Kruger	Insurance Requested	06/30/2020	Insurance Request
07/13/2020	River Canoeing Camping Course	RCCC	River Canoeing (RC)	Jayne Fought	Insurance Requested	07/08/2020	Insurance Request
07/13/2020	Essentials of Kayak Touring	EKT	Coastal Kayak (CK)	Aaron Southern	Insurance Requested	07/16/2020	Insurance Request
07/15/2020	Essentials of River Kayaking	ERK	River Kayaking (RK)	Steve Busch	Insurance Requested	07/01/2020	Insurance Request
07/17/2020	Essentials of Kayak Touring	EKT	Coastal Kayak (CK)	Debbie Hathaway	Insurance Requested	06/16/2020	Insurance Request
07/17/2020	Essentials of Stand Up Paddleboarding	ESUP	Standup Paddleboard (SUP)	Charles Williams	Insurance Requested	06/30/2020	Insurance Request
07/17/2020	Advanced Swiftwater Rescue	ASWR	Safety & Rescue (SR)	Jim McCool	Insurance Requested	07/03/2020	Insurance Request

Showing 1 to 10 of 31 entries   [Export to Excel]   [Export to PDF]

                                          Previous [1] 2 3 4 Next

Appendix A: Participant Roles Table

The image below reflects the Participant Roles Table as of July, 2020.

Role Abbreviation	Role Description	Candidate Evaluation	Course Evaluation	Certification / Endorsement	Description
ASIN	Assisting Instructor	No	No	No	Assistants to a course lead instructor
CAND	Candidate	Required	Required	Yes	Used for participants in certification development and exam courses
CDIN	Cross Discipline	Required	Required	Yes	Used for Instructors seeking certification in another disciple based on SEIC Policy Manual, paragraph 2.C.7.
COIN	Co-Teach Instructor	Required	No	No	Instructors seeking to fulfill a co-teach requirement for an IT application
ENDO	Endorsement	Required	Required	Yes	Used for instructors seeking an endorsement
LDIN	Lead Instructor	No	No	No	The lead instructor on a course
LDTI	Lead Teach Instructor	Required	No	No	Instructors seeking to fulfill a Lead Teach requirement for an IT application
NMPT	Non-Member Participant	No	No	No	Non-member participating in a skills course with no plans to become a member before the end of the course.
OBS	Observer	No	No	No	Used for participants in courses not seeking an assessment or certification who may not be involved in the more challenging elements of the course
PART	Participant	Allowed	Allowed	No	Used for students in skills training and assessment courses
PRAC	Practice Student	No	No	No	Used for participants in courses not seeking an assessment or certification
UDIN	Updating Instructor	Allowed	Allowed	Yes	Used for Instructors seeking to update their existing credential and reset the related expiration date
UGIN	Upgrading Instructor	Required	Required	Yes	Used for Instructors seeking to upgrade to a higher certification within their current discipline based on SEIC Policy Manual, paragraph 2.C.8

Appendix B: Historical Data Imports

The CMS began collecting course information on February 1, 2020. The following historical data has been imported into the CMS to support credential awards and renewal determinations:

- Certifications – Certifications and related expiration dates were imported from the YM Membership Management System on January 31, 2020. Certifications earned on February 1, 2020 or later are recorded using the CMS functions.

- Endorsements – Endorsements and related grant dates were imported from the YM Membership Management System on January 31, 2020. Certifications earned on February 1, 2020 or later are recorded using CMS functions.

- Assessments – Assessments completed prior to February 1, 2020 were imported from the YM Member Management System. Assessments successfully completed on February 1, 2020 or later are recorded using CMS functions.

- Update Courses – Instructor completion of certification update courses for 2017, 2018, 2019 and 2020 through January 31 were imported into the CMS from a spreadsheet provided by the SEI Department for use in validating certification renewals. 1,378 records.

- Teaching – Courses taught by Instructors, ITs and ITEs during 2017, 2018, 2019 and 2020 through January 31, including assisting instructors, were uploaded into the CMS from a spreadsheet provided by the SEI Department for use in validating certification renewals. 24,398 records.