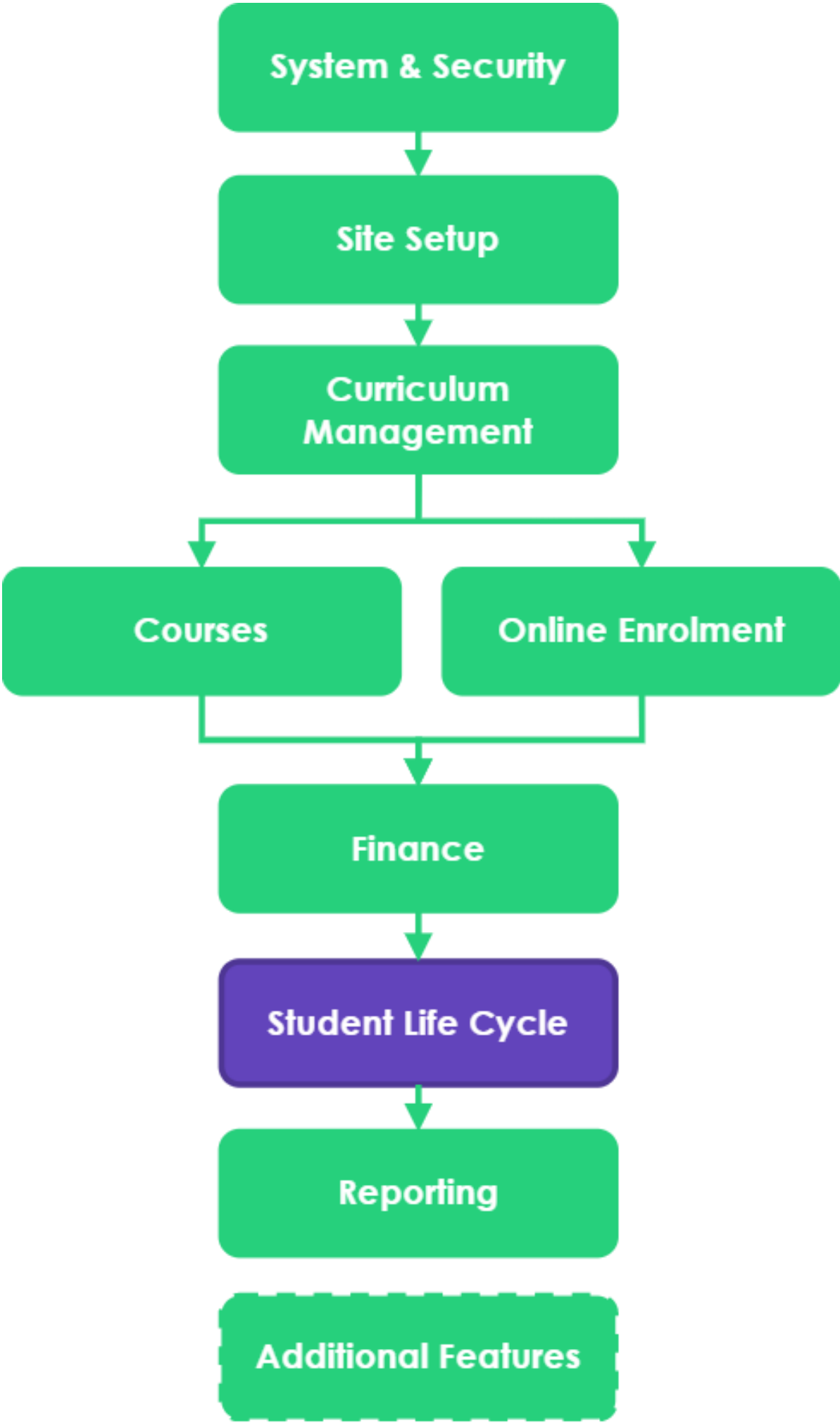


Topic 7 - Student Life Cycle



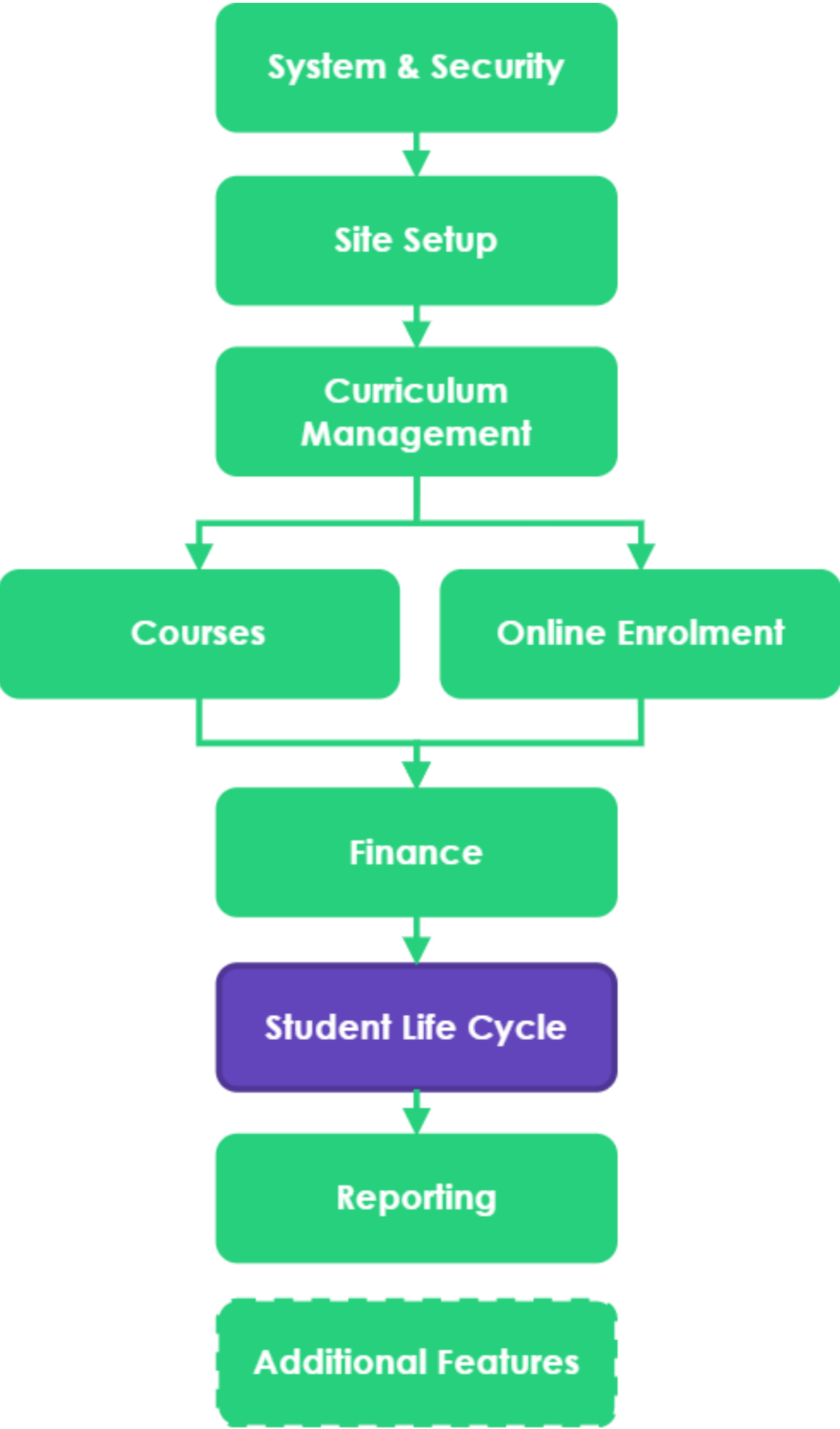
Agenda



Topics Covered

- | | | | |
|---|------------------------|---|---------------------|
| 1 | Student Profiles | } | Managing Enrolments |
| 2 | USI Manager | | |
| 3 | Enrolling into Courses | | |
| 4 | Marking Attendance | | |
| 5 | Recording Outcomes | | |
| 6 | Issuing Certificates | | |
| 7 | Progress Centre | | |
| 8 | Enrolment Completion | | |

Agenda



Learning Objectives

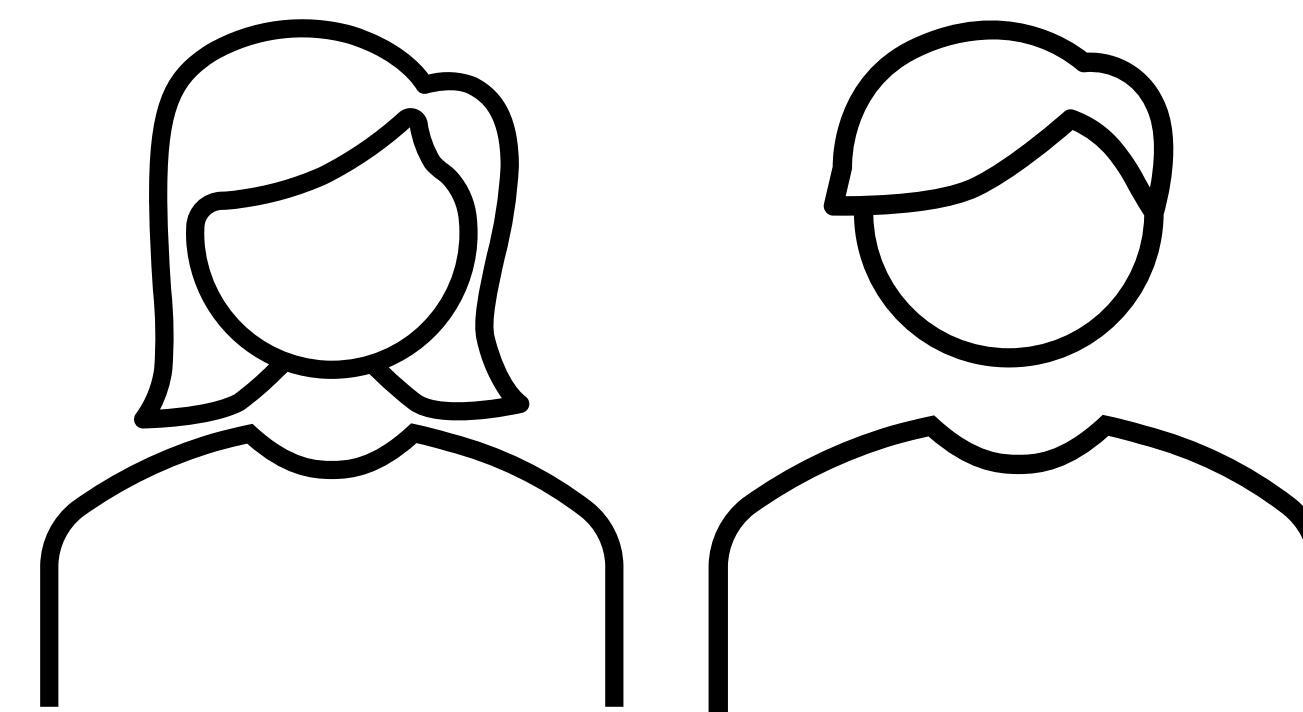
- | | |
|---|--|
| 1 | To understand where and how to verify a USI within the SMS |
| 2 | To create a student enrolment |
| 3 | To record attendance for events |
| 4 | To record results for units |
| 5 | To issue a certificate |

Please Note

Previous Sessions

Though this session focuses on the student life cycle, some aspects strongly relate to previous session

Where applicable, banners identify the session where additional information can be obtained regarding the related topic





Student Profiles

Student Profiles

Creating a party record

Party profiles can be created one of two ways:

1. Automatically through a course form
2. Manually through [Community > Add New Party](#)

When creating manually. AVETMISS details are managed within [Community > List All > select party > Compliance > AVETMISS](#)

The 'New Profile' form is divided into two tabs: 'Simplified Form' and 'Complete Form'. The 'Complete Form' tab is active, showing a 'Profile' section with the following fields: Title (dropdown), Party Identifier (text input), First Name(s) (text input), Surname (text input), Middle Name(s) (text input), Known By (text input), and Gender (dropdown). To the left of the form is a profile picture placeholder with the text 'Click browse button' and a 'Not Stated' dropdown menu. Below the placeholder is a 'View/Edit Tags' link.

The AVETMISS details page for Spencer Smith (00020006) is displayed. The left sidebar shows a navigation menu with 'Person' at the top, followed by 'Profile', 'Compliance', 'Assessments', 'AVETMISS' (highlighted in red), 'Checks', 'Career/Employment', 'Enrolments' (1/0), 'Certificates' (0), 'Finance', 'Balance' (\$-1350.00), 'Schedule', 'Notes / Checklists' (0 +), and 'Email'. The main content area is titled 'AVETMISS Spencer Smith (00020006)' and includes an 'Edit' button. The details are organized into several sections: 'Background' (Labour Force Status: Not stated/@@, Client Identifier, Country of Birth: Not Stated, Town/City of Birth, Nationality: Australia, Indigenous Status: Not stated, Main Language: Not Stated, Proficiency in spoken English), 'Citizenship Details' (Citizenship Status, Citizenship Effective From Date), 'Citizenship History', 'School Details' (At School: Not Stated, School Level: Not stated/@@), and 'Prior Education'. A 'Disability' section shows 'Disability: Not Stated'.

USI

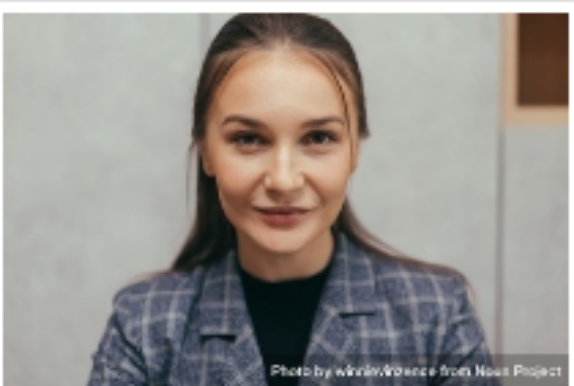
USI Verification

USI verification is done within a party record

This is visually displayed beside a party's details

Community > List All > select party
> Profile > Details

Maryam Fredrick 843

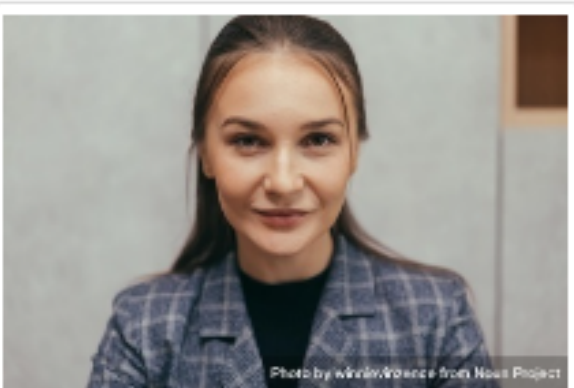


Not Stated
25 May 1966 (56)
[View all](#)

Profile

Title		ID (313)	843
First Name(s) (403)	Maryam	Job Seeker Identifier	
Surname (402)	Fredrick	USI (584)	BNGH7C75FN
Middle Name(s) (404)			✗ Not Verified
Known By			
Gender (315)	Female		
Email		Address	Home: 10 12 St John Street, Launcesotn , TAS 7250, Australia
Phone			

Maryam Fredrick 843



Not Stated
25 May 1966 (56)
[View all](#)

Profile

Title		ID (313)	843
First Name(s) (403)	Maryam	Job Seeker Identifier	
Surname (402)	Fredrick	USI (584)	BNGH7C75FN
Middle Name(s) (404)			✓ Verified on 10/02/23
Known By			
Gender (315)	Female		
Email		Address	Home: 10 12 St John Street, Launcesotn , TAS 7250, Australia
Phone			

USI

USI Verification

Community > List All > select party > Profile > Details > edit

USI field is at the bottom of the screen

You can enter or edit the USI, and select **Verify**

The pop-up box allows for verification

Unique Student Identifier (USI)

USI (584)

BNGH7C75FN

Verify

Don't have a USI?

[Apply online now](#)

If a student undertaking a VET course does not have a USI, a Statement of Attainment or Qualification cannot be issued.

Unique Student Identifier (USI) close

USI Verification


* USI
BNGH7C75FN

* First name ☐ Only one name?
Maryam

* Family name
Fredrick

* Date of birth
25/05/1966

Verify

Powered By  readytech

USI

USI Manager

The USI manager lets you overview USI information across the system

Enrolments > USI manager

USI Manager

22

Parties with a Verified USI

20

Parties with an Unverified USI

994

Parties with USI remediation required

Auto Clean

Unverified USI

Manual Fix

Detailed Log

Status:Completed Successfully

Batch ID:142227

Started:2023-02-10 16:49:09 +1100

Log Type:USI Auto Clean

Finished:2023-02-10 16:49:36 +1100

User:bridgette.kaminski@readytech.io

Time	Message
10 February 2023 4:49:36 PM	Processing Completed
10 February 2023 4:49:36 PM	USI Bulk Verification was successfully created.
10 February 2023 4:49:36 PM	Locate process was done
10 February 2023 4:49:35 PM	Locating party 801 of 917

Support

USI


USI Manager

Enrolments > USI manager

Under these box's you will see three buttons, these buttons will let try and fix these parties who have missing or unverified USI

- 1. Auto Clean
- 2. Unverified USI
- 3. Manual Fix

USI Manager



25
Parties with a Verified USI

Auto Clean

Unverified USI

Manual Fix


Usi Manager

Dashboard

Manual Fix

Manual Fix > List

1 - 22 of 221 Page

First Name	Surname	Date of Birth	Email	City of Birth	Country of Birth	USI Error Message	
Alex	Picone	1/3/2022		Northcote	Australia	<ul style="list-style-type: none">The format of the USI (Unique Student Identifier) is invalid.	
Ashton		7/10/1991				<ul style="list-style-type: none">The format of the USI (Unique Student Identifier) is invalid.	
Fashton		7/10/1991				<ul style="list-style-type: none">The format of the USI (Unique Student Identifier) is invalid.	
Cashton		7/10/1991				<ul style="list-style-type: none">The format of the USI (Unique Student Identifier) is invalid.	
Michaela		16/4/1999				<ul style="list-style-type: none">The format of the USI (Unique Student Identifier) is invalid.	
Archie	Luanda	18/8/1995	.	t	Albania		
Thomas	Elderly	1/1/1999			Not Stated	<ul style="list-style-type: none">InvalidDate of Birth: no matchSingle Name: no matchFirst Name: no match	

Verify

Create

Edit

International Students

Therefore, international students who studied offshore will not appear as requiring remediation in the USI Manager



Lets go do it!

Let's take a look at:

- Create party profile
- Edit AVETMISS details





Student Enrolments

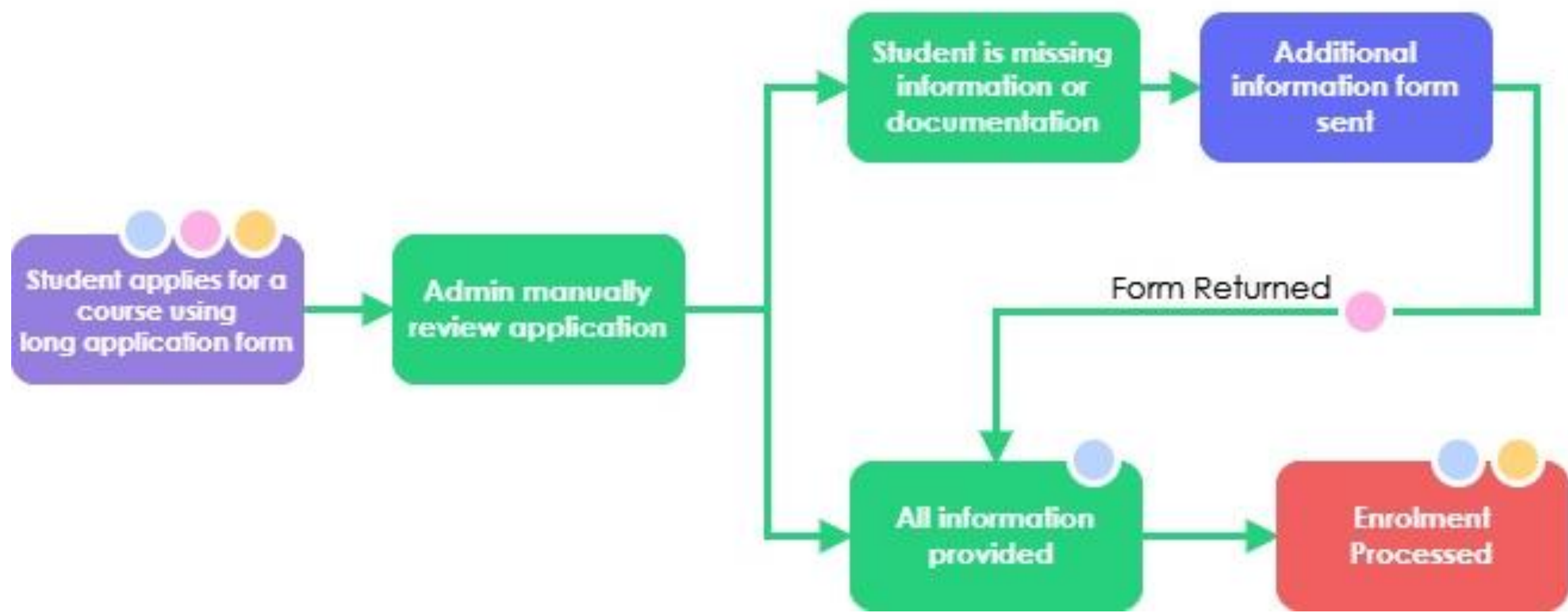
Enrolment

Online Enrolment

When a course application has been completed, we can review and process this

This will depend on your application workflow

Course > Applications >



Course Applications

+ New Application

Course Filters Saved Filters

Search Save Clear Interview Timetable Export

Applied: 4 Offers sent: 0 Offers declined: 0
Offers accepted: 0 Offers deferred: 0

Search Results (Kanban)

1 - 10 of 10 1 Page

New 4	Review 0	Offer 0	Closed 5
CA00010 OFR00017 Jill Smith CSEREA00040 Certificate III in Bread Baking Applied			CA00007 OFR00014 Ella Smile CSEREA00032 Certificate III in Bread Baking Enrolled
CA00009 OFR00016 Charlotte Stewart CSEREA00031 Math Applied			CA00006 OFR00013 Cat Christmas CSEREA00038 Certificate III in Bread Baking Enrolled

Enrolment

Online Enrolment

Review Session 5

CA00010 Jill Smith (PAREA00037) | Course Application

[Edit](#) [Enrol](#) [Offer](#) [Express Offer](#)

Applicant	Application	People
Applicant: Jill Smith Party ID: PAREA00037	Application ID: CA00010 Offer Number: OFR00017 Status: Applied	Assignee: None Agent: None Employer:
Course	Admin	
Course: Certificate III in Bread Baking (S1 CIII Bread Baking) Location: Melbourne Study Mode:	Created On: 14/2/2023 03:39:11 PM Offer Accepted On: Send Email: <input type="checkbox"/> Archived: <input type="checkbox"/> Conditions on Offer: <input type="checkbox"/>	

[Forms](#) [Entry Requirements](#) [Communications](#) [Notes](#) [Documents](#) [Interview](#) [Progress](#)

AVETMISS Enrolment form

Page 1: Registration form

Profile - First Name
Jill

New Enrolment

Jill Smith (PAREA00037) in S1 CIII Bread Baking - CSERE00040 (FBP30421) from 12/4/2023 to 15/6/2023

[Cancel](#) [Back](#) [Next](#) [Confirm Now](#)

Background	Citizenship Details
Labour Force Status: Not stated/@@ Client Identifier: Country of Birth: Australia Town/City of Birth: Launceston Nationality: Australia Indigenous Status: No, Neither Aboriginal nor Torres Strait Main Language: English	Citizenship Status: Australian Citizenship Citizenship Effective From Date:
School Details	Disability

Enrolment

Single Student

Enrolments > Enrol Students

The enrolment wizard will take you through 11 steps



New Enrolment
Spencer Smith (00020006) in Automatic Smart Fees - CSEREA00020 (FNS50222) from 1/5/2023 to 1/5/2024

Progress Bar: COURSE (checked), STUDENT PROFILE, COMPANY, ENROLMENT (Set specific details into this enrolment), UNITS, SCHEDULING, OUTCOMES, FEES, PAYMENTS, CONFIRM.

Buttons: < Back, X Cancel, Next >, Confirm Now

Form Fields:

- Course: CSEREA00020 / Automatic Smart Fees
- Program: FNS50222 / Diploma of Accounting
- *Enrolment Status: Active
- GPA: 0
- *Start Date: 1/5/2023
- *Target End Date: 1/5/2024
- End Date:
- Brand:

Tabs: Course Details, Trainee/Apprentice, Claims/Funding (selected), Finance, Custom Details

Contract: Victoria

Claims & Funding

Support

Progress Bar: COURSE, STUDENT PROFILE, COMPANY, ENROLMENT, UNITS, SCHEDULING, OUTCOMES, FEES, PAYMENTS, CONFIRM (Review and confirm enrolment).

Buttons: X Cancel, < Back, Create

Person

First Name(s):	Spencer	Party ID:	00020006
Surname:	Smith	Date of Birth:	22 September 1997
Gender:	Male	Email:	gemma.cameron+SpencerSmith@readytech.io

Course

Course:	Automatic Smart Fees	Core Units:	7
Program:	Diploma of Accounting	Elective Units:	4
Start Date:	1/5/2023	Stream Units:	0
Target End Date:	1/5/2024	Additional Units:	0
End Date:			
Academic:	Bridgette Trainer		

Finance

Additional Items:	\$2,200.00 - Automatic SmartFees
Payment Terms:	
Total:	\$2,200.00

Buttons: X Cancel, < Back, Support

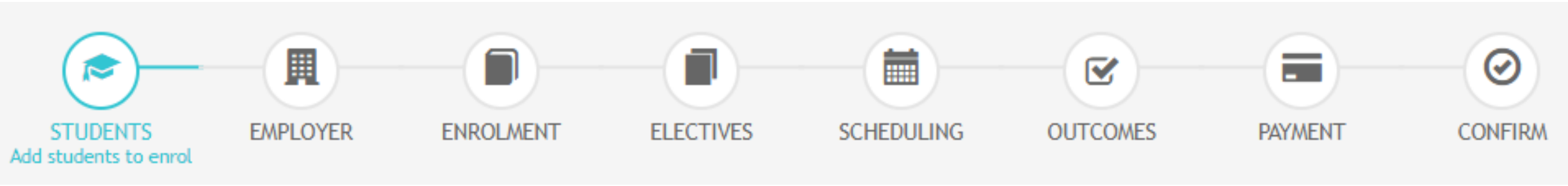
Enrolment

Bulk Enrolling

Bulk enrolment assists with larger intake courses

Course > Course List > select the course > Bulk Actions > Enrolments

Note: The Student Profile step does not exist during bulk enrolment (therefore additional student details cannot be captured)



Bulk Enrolment
2023 Cert III Business - CSEREA00006 (BSB30120) from 16/1/2023 to 16/1/2024

STUDENTS (Add students to enrol) | EMPLOYER | ENROLMENT | ELECTIVES | SCHEDULING | OUTCOMES | PAYMENT | CONFIRM

Students

Surname	First Name	Date of Birth	Employer
✕ Stark	Sam	1/9/1975	
✕ Spoon	Jillian		
✕ Smith	Spencer	22/9/1997	
✕ Scott	Sonny	10/6/1993	
✕ stephenson	stephanie	16/6/1998	

What would you like to do?

OR

Search and select students to enrol

Search

Bulk Enrolment
2023 Cert III Business - CSEREA00006 (BSB30120) from 16/1/2023 to 16/1/2024

STUDENTS | EMPLOYER | ENROLMENT | ELECTIVES (Apply electives to all students) | SCHEDULING | OUTCOMES | PAYMENT | CONFIRM

There were problems with the following fields:

- You must select at least 7 elective units

Elective Units

Required elective units: 7

Available Units (19)

☐ Select All

- ☐ Articulate, present and debate ideas (BSBCRT412)
- ☐ Collect and record data (BSBDAT201)
- ☐ Research and develop business plans (BSBESB401)
- ☐ Maintain financial records (BSREIN302)

Selected Units (0)

☒ Select All

Enrolment

End Dates

Important for reporting requirements

If the enrolment end date or target end date doesn't overlap the AVETMISS generation year, the enrolment won't be included in the export (even if you have unit activity)

If an end date changes, update the individual student's enrolment end date

Enrolments > Enrolments List > select enrolment > edit

Enrolment Edit ENREA00019 / Sam Stark (00020019)

Save Cancel

Course: CSEREA00006 / 2023 Cert III Business

Program: BSB30120 / Certificate III in Business

*Enrolment Status: Active

GPA: 0

*Start Date: 18/1/2023

*Target End Date: 18/1/2024

End Date: 18/1/2024

Brand: RT

Lets go do it!

Let's take a look at:

- Enrolment Wizard
 - Individual
 - Bulk





Recording Activity

ReadyTech Education



Attendance

Single Event

Course > List Course > select course > Timetable > Calendar View > select event > Attendance > Mark

You can record:

- Present (and when)
- Absent (and why)
- Message/note (add additional information)

Event Details

Save

Delete

Disable

Reschedule

Attendance

✓ Mark

👁 View

Details

Title

Diploma of Accounting (2023 Diploma of Accounting)

Type

Class

Start Typing...

☐ Include all Staff

☒ Include all Students

☐ Show Availability

Sonny Scott

✕

Attendance

Edit - Diploma of Accounting (2023 Diploma of Accounting)

Save

cancel

Diploma of Accounting (2023 Diploma of Accounting)

Date: 13/2/2023

Time: 9:00 AM - 11:00 AM 2:00 hrs

Location:

Students

Bulk

Name	Known By	Party ID	Gender	Nationality	Attendance	Attendance Status
	Jillian Spoon	Jilly	00020026	Female	Not Stated	<div><div>Present</div><div>Absent</div></div> <div><div>Reason</div><div>Sick</div></div> <div><div></div><div></div></div> <div><div></div><div></div></div>
<div>Notes: Doctors note provided</div>						
	Sonny Scott		00020001	Female	Not Stated	<div><div>Present</div><div>Absent</div></div> <div><div></div><div></div></div> <div><div></div><div></div></div>
	Spencer Smith	JJ	00020006	Male	Australia	<div><div>Present</div><div>Absent</div></div> <div><div>Time</div><div>09:00AM to 10:00AM</div></div> <div><div>Full Time</div><div></div></div> <div><div></div><div></div></div>

Attendance

Single Event

Bulk attendance will apply the set status to all students in the event

You can modify individual students as necessary

If you have attached units to an event you can also record results for these

Diploma of Accounting (2023 Diploma of Accounting)

Date: 21/2/2023

Time: 9:00 AM - 11:00 AM 2:00 hrs

Location:

Students

Bulk Update

Present

Absent

Time

to

Attendance Status

Add note

Bulk

Mark Units

Jillian Spoon (ENREA00084)

Prepare tax documentation for individuals

Outcome

Continuing enrolment - 70

Outcome Date:

13/2/2023

Start Date

13/2/2023

End Date

Certified on:

Signatory:

Ratified on:

Signatory:

Sonny Scott (ENREA00085)

Prepare tax documentation for individuals

Outcome

Continuing enrolment - 70

Outcome Date:

13/2/2023

Start Date

13/2/2023

End Date

Certified on:

Signatory:

Ratified on:

Signatory:

Spencer Smith (ENREA00055)

Prepare tax documentation for individuals

Outcome

Continuing enrolment - 70

Outcome Date:

13/2/2023

Start Date

13/2/2023


End Date

Certified on:

Signatory:

Ratified on:

Signatory:

 readytech

ReadyTech Education

306

Attendance

Multiple Events (in bulk)

Attendance can be taken for multiple events at once

Course > List course > select course > Bulk Actions > Attendance

Search for a particular date range

Enter your attendance results for all students across all the events

Course > Diploma of Accounting (2023 Diploma of Accounting) > Attendance Update

SaveCancel

From:13/2/2023To:17/2/2023

Events

Show all notes

Attendee	Diploma of Accounting (2023 Diploma of Accounting) (13/2/2023) PresentAbsent Outcome Date 13/2/2023	Diploma of Accounting (2023 Diploma of Accounting) (14/2/2023) PresentAbsent	Diploma of Accounting (2023 Diploma of Accounting) (15/2/2023) PresentAbsent Outcome Date 15/2/2023	Diploma of Accounting (2023 Diploma of Accounting) (16/2/2023) PresentAbsent	Diploma of Accounting (2023 Diploma of Accounting) (16/2/2023) PresentAbsent
Students					
Sonny Scott PresentAbsent	<div>PresentAbsent</div> <div>ReasonSick</div> <div>NotesDoctors note</div>	<div>PresentAbsent</div> <div>Reason</div> <div>NotesDoctors note</div>	<div>PresentAbsent</div> <div>ReasonSick</div> <div>NotesDoctors note</div>	<div>PresentAbsent</div> <div>ReasonSick</div> <div>NotesDoctors note</div>	<div>PresentAbsent</div> <div>ReasonSick</div> <div>NotesDoctors note</div>
Spencer Smith PresentAbsent	<div>PresentAbsent</div> <div>Time09:00AMto10:00AM</div> <div>Add note</div>		<div>PresentAbsent</div> <div>Add note</div>		
Jillian Spoon	<div>PresentAbsent</div>		<div>PresentAbsent</div>		

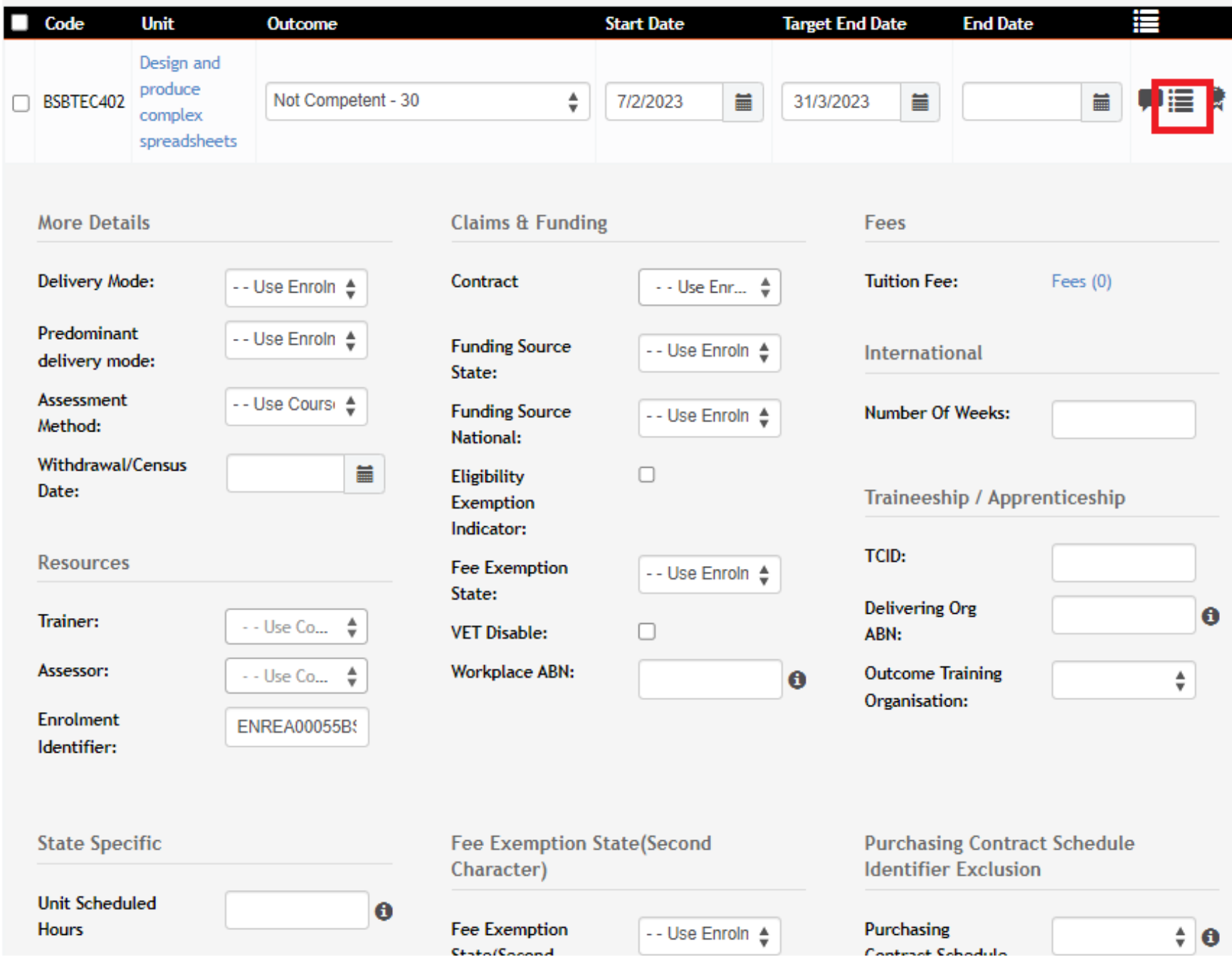
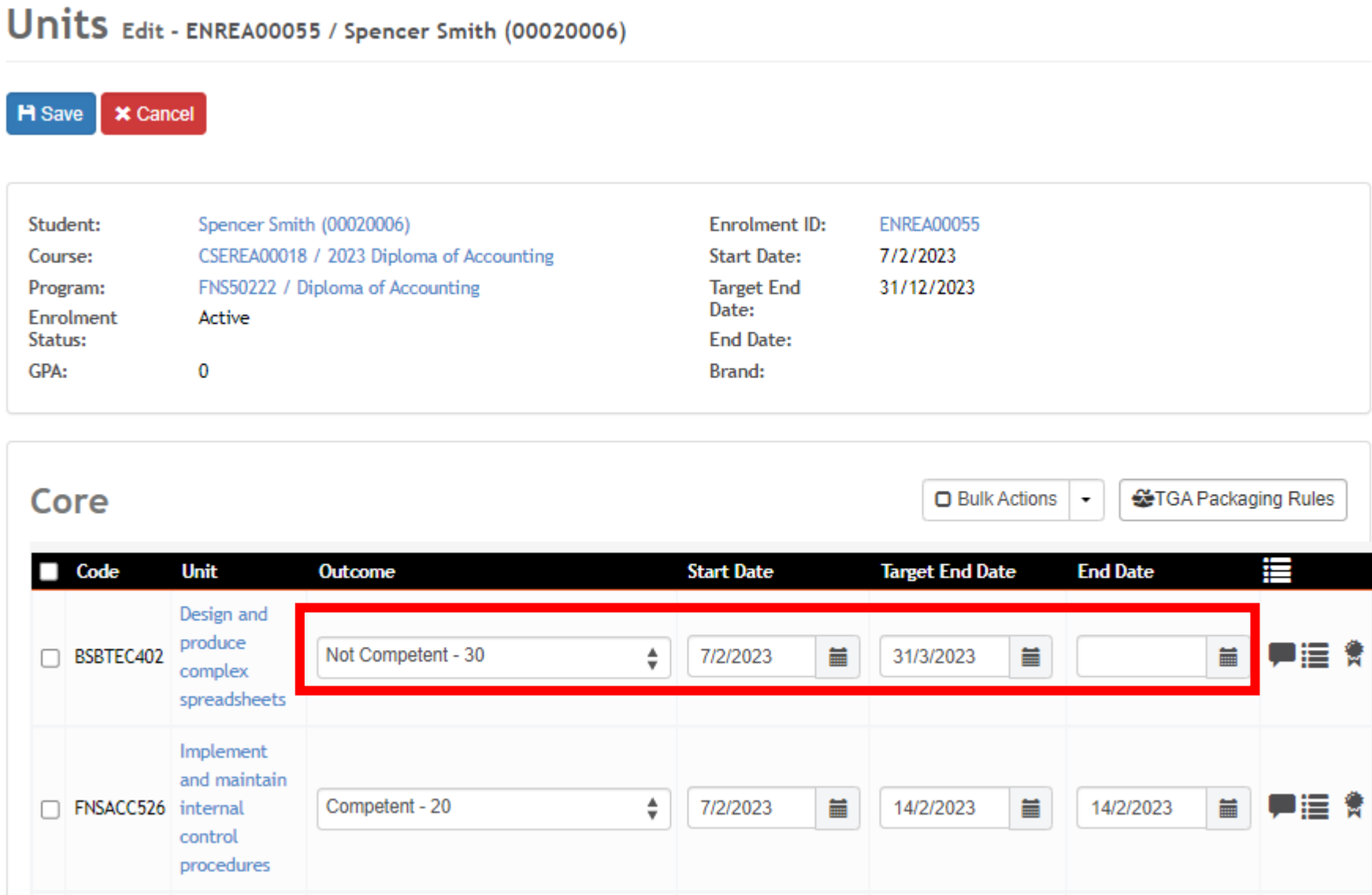
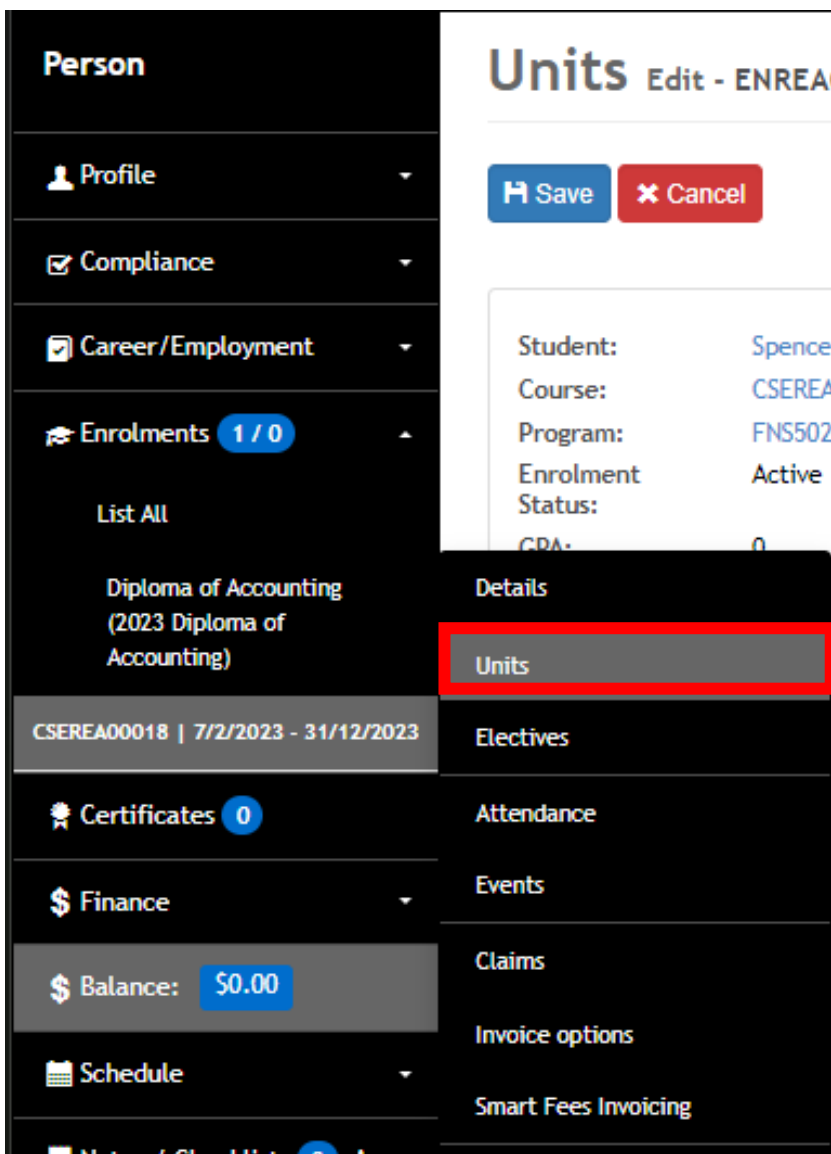
Recording Outcomes

Individual Student

Against the enrolment

Community > List All > select student > Enrolments > select enrolment > Units > Edit

Record for individual units or in bulk



Recording Outcomes

Multiple Students (in bulk)

Performed at a course level

Course > List Course > select course > Bulk Actions > Unit Grading

Find the unit you wish to grade for

Record outcomes for all students in this course

Course

Course

Students 3

Timetable

Notes / Checklists 0

Email

SMS

Documents 0

Letters & Forms

Certificates 0

Bulk Actions

Attendance

Enrolments

Unit Grading

Finance

Admin

Bulk Unit Grading Diploma of Accounting (FNS50222)

Search

2 selected

Filters

Saved Filters

Search

Save

Clear

Save Changes

Prepare tax documentation for individuals (FNSACC522)

AllBulk Actions

Student Name	Outcome	Start Date	End Date
<input type="checkbox"/> Jillian Spoon 00020026	Continuing enrolment - 70	13/2/2023	
<input type="checkbox"/> Sonny Scott 00020001	Continuing enrolment - 70	13/2/2023	
<input type="checkbox"/> Spencer Smith 00020006	Continuing enrolment - 70	13/2/2023	

Provide management accounting information (FNSACC527)

Student Name	Outcome	Start Date	End Date
<input type="checkbox"/> Jillian Spoon 00020026			

Lets go do it!

Let's take a look at:

- Individual recording
 - Attendance
 - Results
- Bulk recording
 - Attendance
 - Results





Awarding

ReadyTech Education

Issuing Certificates

Individual Party

After completion, certificates can be issued

Community > List All > select student > Certificate > +

Created based off a template

Certificates Spencer Smith - 00020006

Step 1: Certificate details

Certificate details

*Template:

Plus Certificate ... x

*Recorded Date:

15/2/2023

Issued Date:

15/2/2023

Reportable:

☒

Notes:

Next

Step 2: Enrolment selection

Enrolment	Rule	Rule Status	Print Status
<input checked="" type="radio"/> Diploma of Accounting (2023 Diploma of Accounting) / ENREA00055	All Units Completed	Ready	Not Printed

Step 3: Preview

Template


Plus Certificate v1.0

Total Students

1

Layout

Clear: A4 Portrait



National Provider Number: 1234


This is to certify that

Spencer Smith

Has fulfilled the requirements for




Certificates Spencer Smith - 00020006

Plus Certificate v1.0



Certificate is created and saved to student's Documents

You can view and download below

Spencer Smith <https://jobready-rto-staging.s3-ap-southeast-2.amazonaws.co>   

Would you like to create another certificate?

+ Create New

Issuing Certificates

Course Level

Issues to all parties in a Course

Course > List Course > select course > Certificate > +

Very similar to issuing individually

Two key differences:

- 1. Select students, not enrolments
- 2. You will be given options for all students on the completion screen

Certificates2023 Diploma of Accounting (CSEREA00018)

Step 1: Certificate details

Certificate details

*Template:

Plus Certificate ... x

*Recorded Date:

15/2/2023

Issued Date:

15/2/2023

Reportable:

☒

Notes:

Next

Step 2: Student selection

Student Name

Filters

Saved Filters

Search

Save

Clear

<input checked="" type="checkbox"/>	Student	Enrol. Status	Enrol. Start Date	Enrol. Target End Date	Rule	Rule Status	Print Status
<input checked="" type="checkbox"/>	Jillian Spoon	Active	7/2/2023	31/12/2023	All Units Completed	Ready	Not Printed
<input checked="" type="checkbox"/>	Sonny Scott	Active	7/2/2023	31/12/2023	All Units Completed	Ready	Not Printed

Certificates2023 Diploma of Accounting (CSEREA00018)

Certificates Created and Saved to Students' Documents

You can view and download them below or click 'Download All' button to download in bulk

Jillian Spoon

https://jobready-rto-staging.s3-ap-southeast-2.amazonaws.co

Sonny Scott

https://jobready-rto-staging.s3-ap-southeast-2.amazonaws.co

Download All

Single PDF File

> readytech

ReadyTech Education 313

Issuing Certificates

Certificate Management

You can modify the rules for the templates to ensure they issue when you desire (e.g. when certain criteria are met)

Administration > Templates > List All

A popular rule for full certificate is “All units completed and USI verified”

Entity: Plus Certificate v1.0 Edit | Letters & Forms Template

Update Cancel Delete

Details

Name: Plus Certificate v1.0

From: [Dropdown]

Subject: [Text Field]

Status: ☒ Enabled ☐ Disabled

Format: ☒ HTML ☐ Text

Type: [Dropdown]

Layout: Clear: A4 Portrait

Category: Certificate

Document Category: Certificate

Portal: ☐

Completion Award: ☒

Authorised User Group: [Text Field]

Type: Qualification

Rule: All Units Completed

Number Sequence: [Text Field]

This template contains custom code and cannot be modified. Please contact JR Plus Support if you wish to make any changes.

Progress Centre

Feature

Progress center is a system feature
Gives an overview of units, subjects, attendance, certificates
Useful for bulk updates/issues across multiple courses

Enrolments > Progress Centre

Progress Centre

Units

Subjects

Attendance

Certificates

Search by

Student

Spencer smith

Filters

Saved Filters

Search

Save

Clear

Bulk Actions

Quick Filters:

< 80%

80% - 85%

85% - 95%

> 95%

1 - 1 of 1

1 Page

	Party ID	Student Name	Course Scope Code	Course Scope Name	Course Code	Course Name	Enrol. Start Date	Enrol. Target End Date	Enrol. End Date	Actual (At today's date)	Actual (Total Enrolment)	Projected (At best rate)	Total Events	Attended Events	Total Scheduled Hours	Attended Hours	Absent Hours	Events
<input type="checkbox"/>	00020006	Spencer Smith	FNS50222	Diploma of Accounting	CSEREA00018	Diploma of Accounting (2023 Diploma of Accounting)	7/2/2023	15/2/2023	15/2/2023	88.24	50.0	50.0	7	4	15.0	7.5	0	

1 - 1 of 1

1 Page

Progress Centre

Units

Subjects

Attendance

Certificates

Search by

Student

Spencer Smith

Filters

Saved Filters

Search

Save

Clear

Bulk Update

1 - 11 of 11

1 Page

	Party ID	Student Name	Course Scope Code	Course Scope Name	Course Code	Course Name	Unit Code	Unit Name	Outcome	Start Date	Target End Date	End Date	Enrolment Status	
<input type="checkbox"/>	00020006	Smith, Spencer	FNS50222	Diploma of Accounting	CSEREA00018	Diploma of Accounting (2023 Diploma of Accounting)	FNSTPB505	Apply legal principles in property law	Competent - 20	7/2/2023		15/2/2023	Completed	
<input type="checkbox"/>	00020006	Smith, Spencer	FNS50222	Diploma of Accounting	CSEREA00018	Diploma of Accounting (2023 Diploma of Accounting)	FNSTPB504	Apply legal principles in corporations and trust law	Competent - 20	7/2/2023		15/2/2023	Completed	
						Diploma of ..		Apply legal						

Lets go do it!

Let's take a look at:

- Issue a certificate to a student
- Issue Statement of Attainment to a course
- Progress Center





Enrolment Completion

Enrolment Completion

Individual

Update student enrolment to show completion

Community > List All > select student > Enrolments > Select Enrolment > Edit

Enrolment Edit

ENREA00055 / Spencer Smith (00020006)

Save

Cancel

Course:

CSEREA00018 / 2023 Diploma of Accounting

Program:

FNS50222 / Diploma of Accounting

*Enrolment Status:

Completed

GPA:

0

*Start Date:

7/2/2023

*Target End Date:

15/2/2023

End Date:

15/2/2023

Brand:

How can I tell if an enrolment is active or not?

Active enrolment



Inactive Enrolment



NOTE!
An Enrolment will only show as inactive after the end date has passed
So end date = today it will not be inactive until tomorrow

Enrolment Completion

Bulk

Update student enrolment to show completion – End Date + Enrolment Status

Courses > Course List > select course > Students > Bulk Actions – End Date







Courses > Course List > select course > Students > Bulk Actions – Enrolment Status

Students Advanced Diploma of Building Design (2023 AdDip Building Design) - CSEREA00009

Search with
Name, ID, USI... Advanced Filters Saved Filters

Search Save Clear

☑ Bulk Actions 1 - 2 of 2 1 Page

	Name	Party ID	Date of Birth	USI	Start Date	Target End Date	End Date	# of Units	Status	Employer	Enabled	
<input type="checkbox"/>	Robert Scott	00020084			24/1/2023	22/3/2023		8	Active		<input checked="" type="checkbox"/>	  
<input type="checkbox"/>	Tom Scott	00020086	2/1/1990		24/1/2023	22/3/2023		8	Active		<input checked="" type="checkbox"/>	  

1 - 2 of 2 1 Page

☑ Bulk Actions

Notes
At School
Contract
Coordinator
Course Type
Delivery Mode
Start Date
End Date
Enrolment Status
Fee Exemption State
Funding Source
Funding Source State
Identification

Course > Advanced Diploma of Building Design (2023 AdDip Building Design) > Bulk Edit Clients

Set all to: 27/3/2023

Name	End Date	Current End Date
Robert Scott	27/3/2023	
Tom Scott	27/3/2023	

Update

Course > Advanced Diploma of Building Design (2023 AdDip Building Design) > Bulk Edit Clients

Set all to: Completed

Name	Enrolment Status	Current Status
Robert Scott	Completed	Active
Tom Scott	Completed	Active

Update

Viewing Inactive Enrolments

Party

If a party has inactive enrolment you will need to click on list all to view the inactive enrolments

Community > List All > select student > Enrolments > List all

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 2

List All

Provide First Aid (First Aid April)

CSEREA00028 | 1/4/2023 - 28/4/2023

Advanced Diploma of Building Design (2023 AdDip Building Design)

CSEREA00024 | 16/2/2023 - 14/2/2024

Certificates 2

Enrolments 00020006 - Spencer Smith

+ New

Code	Course	Enrolment Status	Start Date	Target End	End Date	Employer	Active		
CUA60520	Advanced Diploma of Music [Music] (CSEREA00037)	Completed	1/2/2023	1/2/2024	1/3/2023		<input type="checkbox"/>	More	Edit
FNS50222	Diploma of Accounting (2023 Diploma of Accounting)	Completed	7/2/2023	15/2/2023	15/2/2023		<input type="checkbox"/>	More	Edit
CPP60421	Advanced Diploma of Building Design (2023 AdDip Building Design)	Active	16/2/2023	14/2/2024			<input checked="" type="checkbox"/>	More	Edit
HLTAID011	Provide First Aid (First Aid April)	Active	1/4/2023	28/4/2023			<input checked="" type="checkbox"/>	More	Edit

i

Person

Profile

Details

Contacts 0

Compliance

Career/Employment

Enrolments 2 / 2

List All

Provide First Aid (First Aid April)

CSEREA00028 | 1/4/2023 - 28/4/2023

Advanced Diploma of Building Design (2023 AdDip Building Design)

CSEREA00024 | 16/2/2023 - 14/2/2024

Certificates 2

Spencer Smith



Australia

22 September 1997 (25)

At Risk View all

Identification

No identifications have been recorded

Viewing Inactive Enrolments

Course

Viewing students within a course defaults to active students

To view inactive students (e.g. completed or withdrawn) select Advanced

Course > List Course > select course > Students > Advanced > Show Inactive Students

Course

Course

Students 2

Timetable

Notes / Checklists 0

Email

SMS

Documents 0

Letters & Forms

Students

Advanced Diploma of Music [Music] (CSEREA00037) - CSEREA00037

Search with

Name, ID, USI...

Advanced

Filters

Saved Filters

Search

Save

Clear

Bulk Actions

1 - 2 of 2

1 Page

Name	Party ID	Date of Birth	USI	Start Date	Target End Date	End Date	# of Units	Status	Employer	Enabled
Hamish Shower	00020048			1/2/2023	1/2/2024		15	Active		<input checked="" type="checkbox"/>
Mia Smith	00020036	13/4/1995		1/2/2023	1/2/2024		15	Active		<input checked="" type="checkbox"/>

1 - 2 of 2

1 Page

Course

Course

Students 2

Timetable

Notes / Checklists 0

Email

SMS

Documents 0

Letters & Forms

Certificates 2

Bulk Actions

Finance

Students

Advanced Diploma of Music [Music] (CSEREA00037) - CSEREA00037

Search with

Name, ID, USI...

Advanced

Filters

Saved Filters

Show inactive Students

☒

Search

Save

Clear

Bulk Actions

1 - 5 of 5

1 Page

Name	Party ID	Date of Birth	USI	Start Date	Target End Date	End Date	# of Units	Status	Employer	Enabled
Sonny Scott	00020001	10/6/1993		1/2/2023	1/2/2024	16/2/2023	15	Withdrawn		<input checked="" type="checkbox"/>
Austin Short	00020079	5/11/1998		1/2/2023	1/2/2024	15/3/2023	15	Completed		<input checked="" type="checkbox"/>
Hamish Shower	00020048			1/2/2023	1/2/2024		15	Active		<input checked="" type="checkbox"/>
Mia Smith	00020036	13/4/1995		1/2/2023	1/2/2024		15	Active		<input checked="" type="checkbox"/>
Spencer Smith	00020006	22/9/1997		1/2/2023	1/2/2024	1/3/2023	15	Completed		<input checked="" type="checkbox"/>

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1 Page

Viewing Inactive Courses

Courses that have passed their end date will also default to unlisted

Course > List Course

Display inactive course display through the filter feature making uses of the filter feature

Course > List Course > filter > Course > List Course > search

Courses

+ New

Search

Course Name, Code, Location

Filters

Saved Filters

Search

Save

Clear

Export

Search Results

1 - 20 of 20

1 Page

Course Number	Program Code	Name	Location, State	Start Date	End Date	Enrolments	Active Students	Coordinator	Assessor	Academic	Other Academic	
CSEREA00028	HLTAID011	Provide First Aid (First Aid April)	Launceston Office, TAS	1/4/2023	28/4/2023	4/40	4	Tim Tywin	Tully Tywin	Tim Tywin	Bridgette Trainer	
CSEREA00034	FNS50222	Diploma of Accounting (CSEREA00034)	Launceston Office, TAS	1/2/2023	31/5/2023	2/0	2	Bridgette Trainer	Tom Troop	Tully Tywin	Tom Thomas	
CSEREA00026	PD1	Professional Development One (CSEREA00026)		1/5/2023	30/6/2023	10/999	10	Bridgette Trainer	Tyler Trent	Tom Troop	Tully Trump	
CSEREA00038	CPP60421	Advanced Diploma of Building Design (AdDip)	VIC	15/3/2023	1/11/2023	2/0	2	Trainer TBA	Trainer	Trainer TBA	Trainer TBA	

Courses

+ New

Search

Course Name, Code, Location

Filters

Saved Filters

Include closed courses

×

Search

Save

Clear

Export

Search Results

1 - 22 of 22

1 Page

Course Number	Program Code	Name	Location, State	Start Date	End Date	Enrolments	Active Students	Coordinator	Assessor	Academic	Other Academic	
CSEREA00001	HLTAID011	Provide First Aid (CSEREA00001)	Launceston Office, TAS	11/11/2022	12/11/2022	0/0	0	Bridgette Trainer	Bridgette Trainer	Bridgette Trainer	Bridgette Trainer	
CSEREA00004	HLTAID011	Provide First Aid (CSEREA00004)	Launceston Office, TAS	2/12/2022	3/12/2022	0/0	0	Bridgette Trainer	Bridgette Trainer	Bridgette Trainer	Bridgette Trainer	
CSEREA00028	HLTAID011	Provide First Aid (First Aid April)	Launceston Office, TAS	1/4/2023	28/4/2023	4/40	4	Tim Tywin	Tully Tywin	Tim Tywin	Bridgette Trainer	
CSEREA00034	FNS50222	Diploma of Accounting (CSEREA00034)	Launceston Office, TAS	1/2/2023	31/5/2023	2/0	2	Bridgette Trainer	Tom Troop	Tully Tywin	Tom Thomas	

Lets go do it!

Let's take a look at:

- Complete enrolment status
 - Individual
 - Bulk
- View inactive students



Summary

What have we done today?

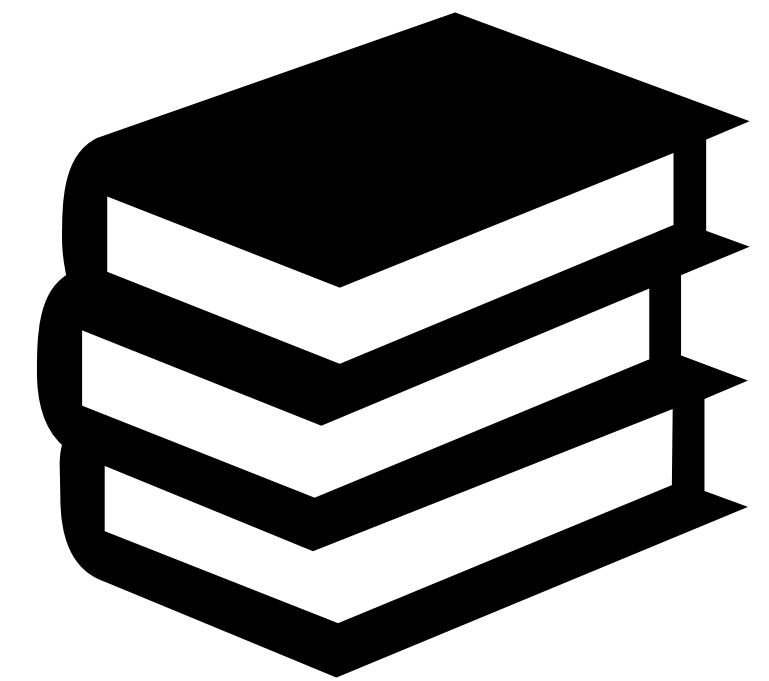
- Student profiles
- USI manager
- Managing enrolments
- Marking attendance
- Recording outcomes
- Issuing certificates
- Enrolment completion
- Progress centre



Action Items

What do I need to do after today's session?

- Create a party profile and edit their AVETMISS details
- Verify a student's USI
- Enrol a student in a course
- Enrol multiple students into a course (Bulk Enrolling)
- Record attendance for an event
- Record results for a party profile
- Make use of the bulk feature to record attendance and unit results
- Issue a certificate to a student who has completed all their units
- Update enrolment status to completed

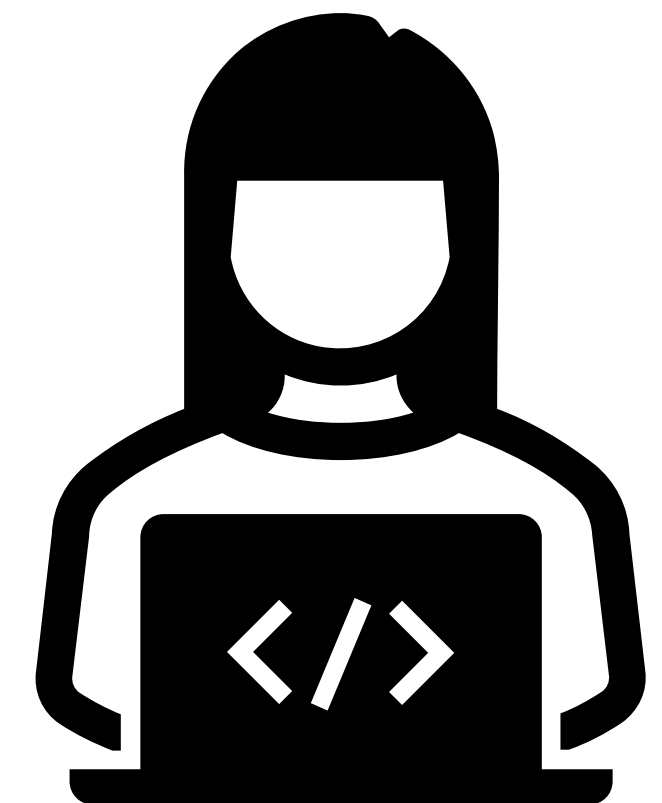


Enjoyed today's session?

[Please navigate to article here](#)

Here you will find all the information and resources for this series

- A copy of the PowerPoint slides
- Links for resources relevant to today's session
- Details on the materials required for upcoming sessions
- Booking links for upcoming sessions
- Recordings from today and previous sessions



Thank you

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