

Staff / Instructor Certifications

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Permissions control the ability for your Users to see certain data and take specific actions. Before moving forward review [User Permissions for Certifications](#).

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

- ★ Ensure students are protected by keeping staff certifications current.
- ★ Maintain historical reporting; expired certifications are not overwritten and remain in the staff record.
- ★ Monitor certification alerts from the Executive Dashboard.

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

Create and Manage Certification Drop-down Values

Add New Certification Drop-down Values

Determine which certifications are needed for your business and add the drop-down values. These values will display as options in the drop-down list when adding new certifications to a staff member

(Staff record). There is no limit to the number of certification drop-downs you can add.

To add a certification drop-down value:

1. Go to **Tools > Edit Settings > Drop-down Lists** and choose the **Certifications** list (Staff section).
2. Click **+Add Row** and add the **Certification Name**.
3. Select **Required** (if applicable), and the **Expiration Time Frame** in months (up to 60 months/5 years).

Note: A *Certification Name* cannot be used more than once. You will be prompted to change the name.

Certification Name*	Required ?	Expiration Time Frame	
Background Check	<input checked="" type="checkbox"/>	Expires every 36 months	Delete
Basic First Aid	<input checked="" type="checkbox"/>	Expires every 12 months	Delete
Epi-Pen (Kept w/staff member)	<input type="checkbox"/>	Expires every months	Delete
Infant/Child CPR	<input checked="" type="checkbox"/>	Expires every 12 months	Delete

4. Click **Save Changes**.

Edit a Certification Drop-down Value

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

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

Delete Certification Drop-down Value

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

1. Go to **Tools > Edit Settings > Drop-down Lists** and choose the **Certifications** list (Staff section).
2. Click **Delete** and **Save Changes** when done.



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





Work with Staff Certifications

There are a few different ways to access the certifications.


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

Staff Certifications									
← RETURN									
ALL STAFF CERTIFICATIONS >									
Showing 21 of 21 Staff Certifications									
Drag a column header and drop it here to group by that column									
<input type="checkbox"/>	TYPE	FIRST NAME	LAST NAME	EMAIL	STAFF STATUS	CERT STATUS	CERTIFIED ON	EXPIRES ON	PAPER COPY
<input type="checkbox"/>	OPTIONAL	Ashley	Smith	ashley@gmail.com	Active	CURRENT	Jul 15, 2020	Jul 15, 2021	No
<input type="checkbox"/>	REQUIRED	Michelle	Ager	michelle@yahoo.com	Active	EXPIRED	Dec 14, 2018	Dec 14, 2019	Yes
<input type="checkbox"/>	REQUIRED	Michelle	Ager	michelle@yahoo.com	Active	DUE (30 DAYS)	Jan 3, 2020	Jan 3, 2021	Yes
<input type="checkbox"/>	REQUIRED	Stephanie	Andrews	sandrews@mail.com	Active	INCOMPLETE			No
<input type="checkbox"/>	REQUIRED	Barnhardt	hbarndt@email.com	Active	INCOMPLETE				No
<input type="checkbox"/>	REQUIRED	tbath@jackrabbittech.co	tbath@jackrabbittech.co	Inactive	INCOMPLETE				No
<input type="checkbox"/>	REQUIRED	rchurch@gmail.com	rchurch@gmail.com	Active	INCOMPLETE				No
<input type="checkbox"/>	REQUIRED	Dianne	Harris	dharris@mail.com	Active	INCOMPLETE			No

Use the action icons (top right of page) to complete the following:

- **Manage Certifications** - use the quick link to go to the *Drop-down List Editor*, where you can add or make changes to certification drop-down values. Changes made will update all existing certifications in all staff records.
- **Send Message** - use the *Send Message (icon)*  to generate email reminders to selected staff members when certifications are due. **Note:** To email all staff members, leave the checkboxes in the first column of the grid unselected.
- **Add New Certificate** - click the *Add New Certificate (icon)*  to open a *New Certificate* window and add a new individual certificate for a staff member.
- **Refresh the data** - click the *Refresh Grid (icon)*  to refresh the data in the grid.
- **Export data** - leave all checkboxes in the 1st column unchecked and click the *More (icon)*  to export the data in the grid to Excel.

Additional actions can be completed in the grid:

- Move and sort columns in the grid. Refer to [Work with Grids in Jackrabbit](#) for more details on how easy and flexible the grids are to work with.
- Edit or delete individual staff certifications from the *Row Menu*  in the 2nd column.

- Edit an *Incomplete* certification for a staff member. Add the *Certified On* date to remove the *Incomplete* status.
- Click on a staff member name to access their individual certifications (*Staff record* > *Certifications* tab).

Note: In the *Notes* column in the staff record: "**Legacy Date= xxxxxxxx**", indicates certifications existing prior to December 2019 and have been migrated to the grid format. These certificates will display as *Incomplete* for required certificates under *Cert Status* because they need to be updated with a *Certified On* date.

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

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



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

Executive Dashboard Certification Alerts

Certifications that are coming due in the next 30 days or are currently overdue are listed in the *Alerts* section on the *Executive Dashboard*. Use the links to go to the *Staff Certifications* page where you can see details of the certifications and take action, for example, email a reminder to the staff members to update their certifications.

