

Staff / Instructor Certifications

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[Watch a \(2:30\) video tutorial on Staff Certifications](#)

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

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



The first step for Staff Certifications is to [add new certification drop-down values](#).

In this article:

- [Create and Manage Certification Drop-down Values](#)
- [Work with Staff Certifications](#)
- [Executive Dashboard Certification Alerts](#)

[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.

The screenshot shows a table titled "List: Certifications" with a tip: "Shorter values reduce word-wrapping on your screens and reports." There is a "+ Add Row" button. The table has three columns: "Certification Name", "Required", and "Expiration Time Frame".

| 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 @MANAGE CERTIFICATIONS

← RETURN

ALL STAFF CERTIFICATIONS >

Showing 13 of 13 Staff Certifications @HELP WITH THIS GRID

[Export to Excel](#)

Drag a column header and drop it here to group by that column

| | NAME | TYPE | FIRST NAME | LAST NAME | EMAIL | STAFF STATUS | CERT STATUS | CERTIFIED ON | EXPIRES ON | PAPER COPY |
|--------------------------|------------------------|----------|------------|-----------|--|--------------|-------------|--------------|--------------|------------|
| <input type="checkbox"/> | CPR | REQUIRED | Stephanie | Andrews | stephandrews@gmail.com | Active | OVERDUE | Nov 1, 2018 | Nov 1, 2019 | No |
| <input type="checkbox"/> | Criminal Records Check | REQUIRED | Stephanie | Andrews | stephandrews@gmail.com | Active | OVERDUE | Dec 1, 2018 | Dec 1, 2019 | No |
| <input type="checkbox"/> | First Aid | REQUIRED | Stephanie | Andrews | stephandrews@gmail.com | Active | INCOMPLETE | | | No |
| <input type="checkbox"/> | CPR | REQUIRED | John | Linton | jlintonjr@outlook.com | Active | OVERDUE | Dec 2, 2018 | Dec 2, 2019 | No |
| <input type="checkbox"/> | Criminal | REQUIRED | John | Linton | jlintonjr@outlook.com | Active | INCOMPLETE | | | No |
| <input type="checkbox"/> | First Aid | REQUIRED | John | Linton | jlintonjr@outlook.com | Active | INCOMPLETE | | | No |
| <input type="checkbox"/> | CPR | REQUIRED | Dianne | Harris | dliinth@gmail.com | Active | EXPIRED | Aug 15, 2017 | Aug 15, 2018 | Yes |
| <input type="checkbox"/> | CPR | REQUIRED | Dianne | Harris | dliinth@gmail.com | Active | CURRENT | Dec 4, 2019 | Dec 4, 2020 | No |

Annotations:

- Click on any staff member to access an individual certification record.
- Quick link to the Drop-down Editor.
- Send an email reminder to staff members.
- Add a new certificate to a staff member.
- Click to Edit or Delete an individual certificate.
- A status of Incomplete means information must be added to the certificate. Select the row menu to the left to update.

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

- Click the **Manage Certifications** 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.
- Use the send 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.

- Click (+) to open a *New Certificate* window and add a new individual certificate for a staff member.

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 certificates 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 certifications 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/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. |

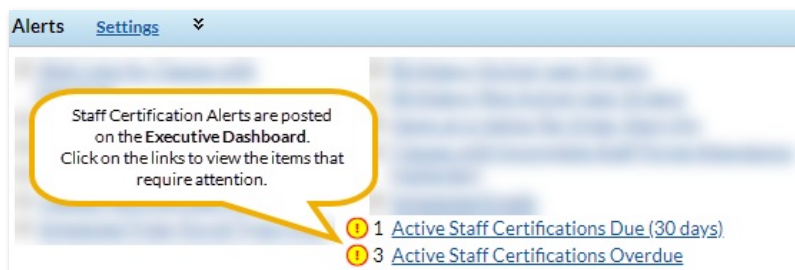


When a staff member re-certifies, **DO NOT** delete or edit their outdated certificate, instead, add a new certificate with the new **Certified On** date; the status of the old certificate will show as **Expired**. This allows you to retain the history.

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.



Setting the right Certification permissions for your Users is very important!
Click this link to review the [User Permissions for Certifications](#).
