Entrepreneurial Course Directions

(Updated 1/25/2021)

An entrepreneurial course is a class that an instructor arranges to teach for their own client. The course may be for compensation, it may be a pro bono course that you are doing for a non-profit, or you may be doing the class as part of your work duties for your employer. Such courses are arranged outside of the confines of a Training Site and the Training Center. In other words, you are the boss. You must still follow all AHA rules and curriculum and the Training Center is still responsible for the quality of the class. CASE will provide guidance if you have questions and we rent equipment. However, at the end of the day, you are the course director.

Pre-approval is required for all classes

All entrepreneurial courses must be approved by the training center **in advance**. Cards will not be issued for classes that are no pre-approved. Exception to the rule is for last minute skills checks (see number 3 below). Please note the C.A.S.E. office manager works a limited number of hours per week and instructors should not expect an immediate response.

Below are the steps of how to run a class.

1. Arrange the class.

2. Complete the digital Course Request Form and submit to case.course.manager@gmail.com.

   Or

3. Email case.course.manager@gmail.com to request permission to hold class. You must email us at least **5 business days prior** to the class. Email must include the following:
   a. Course to be taught (Heartsaver, BLS Provider, First Aid, etc.)
   b. Date and time of class
   c. Location of class name (Dr. Such and Such, or XYXZ school, etc.)
   d. Street address including suite/room numbers of class
   e. Number of expected students
   f. Source of equipment to teach class
   g. How the books will be issued to the students
   h. What you require from CPR AED and Safety Education (Video, rental of manikins, etc.).
   i. If there are adjunct instructors, please list their names. If they are instructors who are not affiliated with CASE, then you must submit a copy of their instructor card (front and back) to case.course.manager@gmail.com

4. **Short notice classes**: In the event you have a short notice skill check or one-on-one class, in addition to completing either step 2 or 3, also immediately call 301-681-4300 prior to the class to provide the above information. Leave a message if no one answers. In general, however, you must receive permission to run a class in advance! Those who seem to be abusing this exception are subject to deactivation from the Training Center.

5. CASE Staff will create the class in Training Center Manager for you. **Do not** create the class. Once we create the class in Training Center Manager, you will receive an email advising you that you have been approved/assigned to the class.

6. You will also receive a list of URL addresses for the number of students you indicated are in the class.

7. At this point, you will be able to log in on the instructor portal to view your course (direct link in item #8 below).

8. Run the class:

    a. You are the coordinator. You are responsible to have prepared for the class and all AHA and CASE required documents, equipment, and resources.
        i. Instructor to student must be ratio 1:8 or less for CPR classes
        ii. Every student must have their own book that they keep.
        iii. Manikin to student ratio never more than 1:3 (adult and if applicable, also infant)
        iv. Replacement lungs
            - Only Laerdal lungs can be used for multiple students. Other manikins you must replace the lung after each student use.
        v. Pocket masks with valves, one for each student
        vi. Bag Valve Mask (BVM) resuscitator for BLS classes (1 for every two students)
        vii. AED trainer to student ratio never more that 1:8
        viii. Skills sheets for adult and if applicable, infant and first aid
        ix. Answer sheets for written test if applicable
        x. Online exam URL addresses, one for each student (if appropriate)
        xi. Course evaluation for each student
        xii. Video (**not optional)**
            - You may rent from CASE

    b. You need to collect from each student the following information (**not optional**)
        i. Last Name, First Name
        ii. Address
            - What they usually use for licensing requirements is fine
        iii. Phone number (Company general switchboard numbers not appropriate)
        iv. Email address (**not optional**)
            - If they **truly** do not have an email account, we can make an exception (should be rare)
        v. Exam score if applicable
        vi. Notes on remediation (Skills or written exam) if appropriate
            - First exam score and then final score
            - How many attempts at skills until success
        vii. You may use a sign in sheet or paper roster. However, the official roster will be what is on the computer for BLS and Heartsaver classes

9. Scan the following paperwork from the course into one PDF document to your computer:
    a. Properly and legibly completed skills check sheets
    b. Course evaluations
    c. If applicable, each student's certificate of completion and score of the online exam
    d. If remediation occurred for a student, include all associated paperwork marked accordingly.

    e. Save the name of the document as "Course Paperwork *(Date)*".
    f. To combine PDF files into one document, you can use a free app for your computer such as https://pdfsam.org/ or an app for your phone (***PDFelement*** for Android) (***PDF Merge*** for Apple)

10. Go to the instructor portal in Training Center Manager (TCM) and log in. (Access by going to www.trainingcentertechnologies.com/CPRAEDSafetyEducation. Press the "*Instructors"* link at the top.) Enter your email and your password (if you have not used TCM yet your password is most likely "Password", you can then change it after you log in). You can also **access the TCM Instructor link by going to CASE's website**: www.cpraedandsafety.com and at the very bottom left-hand side, click on "Instructor Page".
11. Select the tab "***Courses***". (**Never utilize the "*Submit Rosters*" Tab.** We will not be using that feature in the system.) Find the course that you need to complete and press the blue "pencil" button to edit the class.
    a. Review the course including instructor information, times, and course address. If any of the information is incorrect, email case.course.manager@gmail.com immediately with the corrections.
    b. At the bottom left side of the page, click on the button *"Add Students".* Fill in the following fields appropriately:
        i. First and Last Name **(Required)**
        ii. Email **(Required)**
        iii. Do not complete the license field or DOB!
        iv. Phone Number **(Required)**
        v. Address (what they use for most license/certification information) **(Required)**
        vi. City, State, Zip **(Required)**
        vii. Test Score. If course has no test, leave blank
        viii. Select appropriate status.
    c. Click *"Add Student & Save"* to add additional students.
    d. In the "Other" box in the course description area update the course "Status".
    e. When finished, click *"**Submit**".* **The student data will not save unless you click the Submit button.**

12. Upload the course files:
    a. Click the *"Link Files"* button. A new window will open. Click the *"Upload"* button in upper left corner.
    b. Another new window will open.
    c. Click one of the blank *"Select"* boxes. A dialog box will open to your computer's files. Surf to the document that you have saved and highlight it. Then press the *"Open"* button.
    d. The Upload window will reappear. Press the *"Upload"* button.
    e. The Link Files window will now reappear, and your file should be listed. If not, click the *"Refresh"* button.
    f. Close the window after all files are uploaded (there is no "Save" button after uploading paperwork).

13. Email case.course.manager@gmail.com.
    a. Make the subject of the email the name of the class, the date, and the word "Completed" (for example: HS AED 3.20.2016 completed).
    b. In the email note that you have completed the course and, if applicable, ready to pay

your invoice for the cards. All invoicing and payment will be through TCM Client Portal.

c. BLS cards are $10/ea and Heartsaver book + card is $27.38/ea

d. **All E-Cards are sent out by the C.A.S.E. office manager** within 2 business days after receiving notification of course completion by the Lead Instructor **and** all paperwork and TCM data has been entered correctly by the Lead Instructor.

14. If you have borrowed/rented items from CASE, you must return them according to the pre-arranged agreement.

15. After a new instructor's second independent class, if we are finding that we need to frequently provide hands on directions to you regarding your TCM login/entering data for your classes or that an instructor is making frequent mistakes, we will begin charging a $20 fee per class to cover our increase administration costs.

CPR AED & Safety Education
cpraedtraining@comcast.net
301-681-4300

Entrepreneurial Course Guide Summary

1. **Request permission to hold course via email to case.course.manager@gmail.com**

2. **Get confirmation that course is created.**

3. **Get your equipment and supplies ready.**

4. **All students get books.**

5. **Run class.**

6. **Scan paperwork**

7. **Enter students into Training Center Manager Instructor Portal.**

8. **Upload paperwork.**

9. **Email CASE.course.manager@gmail.com that class is done.**

10. **IF…TCM and paperwork is proper, cards issued within 2 business days.**

11. **Return equipment properly.**