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i50 Consulting Services

Category 8: Awarding the IACET CEUs and Maintaining Learner Records

8.5 - Record Retention Process

I50 Consulting Services has developed the Record Retention Process to maintain training records and make them available to learners for a minimum of seven (7) years. The I50 Consulting Services Record Retention Process resides on the I50 Consulting Services website (i50consulting.com).



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RECORD RETENTION PROCESS

Table of Contents

Table of Contents	2
Purpose	3
Responsibilities	3
Procedures	3
Approval(s).....	4
Revision History	4

Purpose

The purpose of this process is to ensure all records are retained and made available for learners.

Responsibilities

The Data Manager within *I5O Consulting Services* is responsible for retaining all records.

Procedures

CEU credit records will be maintained by I5O for a minimum of seven (7) years from the end of the calendar year when they were awarded. CEU records shall be released only at the request of the student, and only to persons or agencies authorized by the student to receive this information.

CEU credit records will be maintained by I5O in their hosted database system GoSignMeUp. These records will be maintained and updated by the Data Manager.

Personal CEU credit records will be made available to students through either the GoSignMeUp account or request to the Data Manager.

- The student has access via their login credential thru GoSignMeUp to review and print their CEU credit records.
- The Data Manger via request from student may issue the CEU credit record to the student or person student designates to have this information in writing.

Maintaining Learner Records (SOP)

Process Name:	Author (Date):	Approver (Date):	Remark (Department Name, SOP ID, etc.)
Learner Records:	Nancy Cotton, 12/10/2020	Teresa Boone, 12/13/2020	

Responsible Audience	References
Data Manager	SOP Manual

This SOP's Purpose/Goal
Detailed process for maintaining learner records.

Standard Operation:
<p>1. Notification of completion.</p> <p>a. Email received from facilitator/instructor indicating passage or failure.</p> <p>2. Database records updated.</p> <p>a. Updated in web application "GoSignMeUp" (https://subr.gosignmeup.com/Public/Course/Browse).</p> <p>b. Data manager logs into system using administrator username and password and edit program information by;</p> <ol style="list-style-type: none"> 1. At home screen click on 'course grid' icon. 2. In search field enter in name of course that needs records updated. 3. For a bundle track which includes 8 modules, each module will have to be selected and transcribed. If it is just one module then select that module and transcribe student. 4. Select the module to transcribe grade and then select 'transcribe' in actions field. 5. Transcribe window will open, check student name, then for any CEU credit hours enter the hours, for grade enter grade. 6. Select 'transcribe check' and then hit 'submit'. <p>3. Records Request:</p> <p>a. Students have 2 options to request data records;</p> <ol style="list-style-type: none"> 1. Via email to data manager at i5oconsultants@outlook.com. <ol style="list-style-type: none"> a. Upon receipt of email request the data manager will submit a form for record release to student or student may obtain the record release form from the website i5oconsulting.com. b. Upon receipt of request, a pdf transcript will be printed by going to records database in gosignmeup application and; <ol style="list-style-type: none"> a. Data manager logs into system with credentials. b. From the home screen select 'reports' -> 'other reports'. c. Select print transcripts by students d. In search option type in student name or select from drop down menu. e. Select template and then select print. 2. Student can log into their gosignmeup account and print their transcripts. <p>4. Record Retention:</p> <p>a. Records will be maintained in GoSignMeUp application database for period of seven (7) years.</p>

Revision History:			
Version	Revised By:	Date:	Approved By:
1.0	Nancy Cotton	5/30/2020	5/31/2020
2.0	Nancy Cotton	12/10/2020	12/13/2020