ECSI HELP DOCUMENT

Contents

How do I log in to the ECSI website?

1. To log in to the ECSI website, go to **ecsinstitute.org** and then click **LOGIN to Member Center**.

2. Under Login to the Member Center, type your Email and Password in the text boxes, and then click **Submit**.

Note: If you have forgotten your password, type your email address under **Forgot your password**, and then click **Submit**.

The Member Center opens. You can use the commands on the navigation bar on the left or the navigation bar across the top to order materials, manage rosters and seats, and perform other administrative and instructor tasks.

As an Administrator, how do I add new instructors?

As an Administrator, you can add yourself as an instructor and add others as instructors as well. To do so, take the following steps:

1. Log in to the ECSI website.

2. On the navigation bar on the left side of the Member Center screen, click **Education Center Coordinator Administration**. The navigation bar expands to display administrative options.
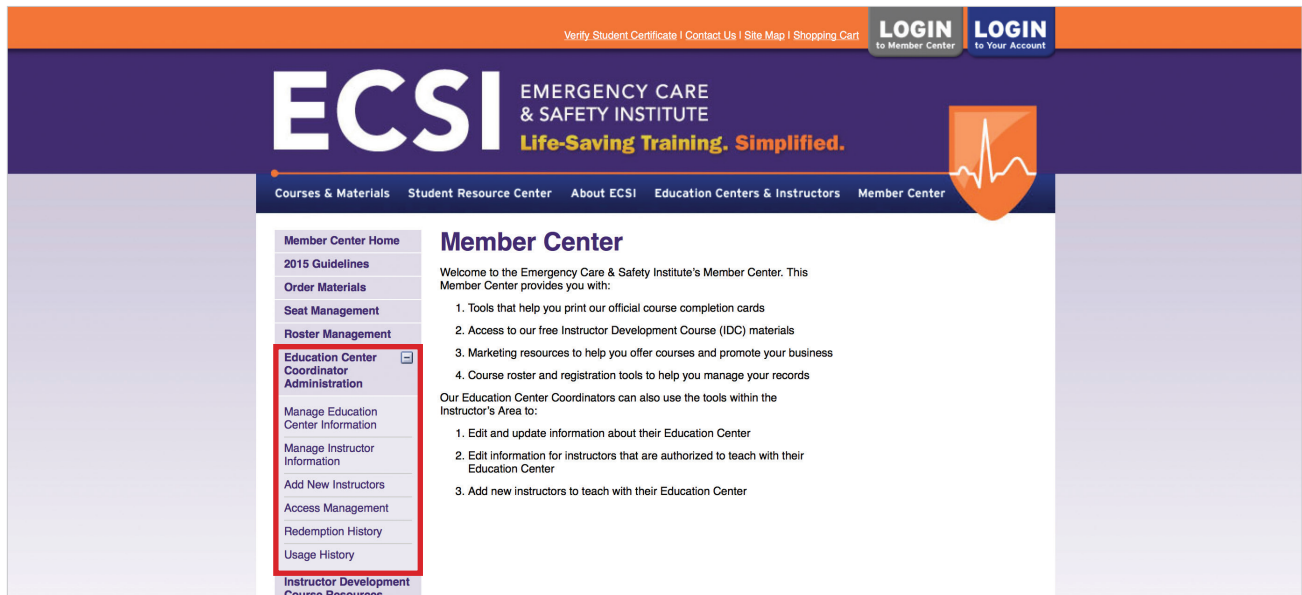
3. Click **Add New Instructors**.
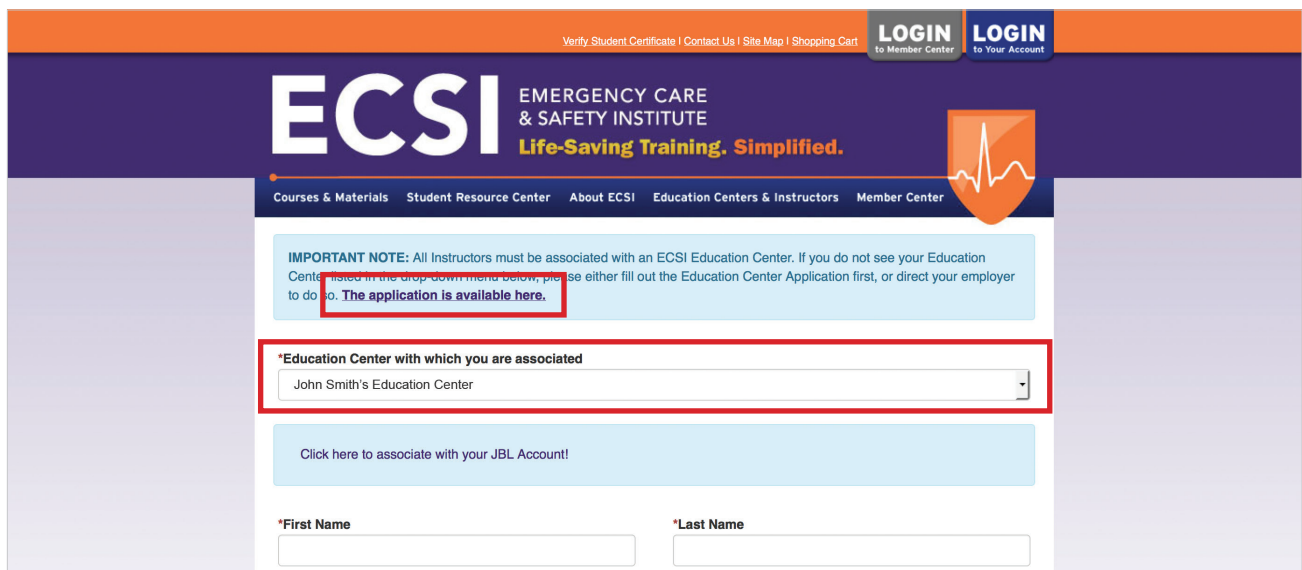
4. (optional) The screen to add a new instructor should display the education center with which you're associated, but if it doesn't, click the **Education Center with which you are associated** down arrow and choose an education center from the list.

    Note: If you don't see your education center listed, you need to fill out the Education Center Application first. You can click the **The application is available here** link if necessary. Instructors must be associated with an ECSI Education Center in order to be registered on the ECSI website.

5. (optional) Click the [Click here to associate with your JBL Account](#) link to associate your ECSI account with your Jones & Bartlett Learning account.

    If you are an administrator adding instructors, you should either get the instructors' JBL log-in credentials from them or notify the instructors that they will have to associate their ed center accounts with their JBL accounts in order to use the ECSI website to set up a course or submit a roster.

6. Fill in the required fields, which are marked with an asterisk.

7. Under **Please select all of the courses that you are qualified to teach**, click the check box for each course the instructor is qualified for. You may need to scroll to see all of the options.

You can choose to be "grandfathered" if you currently have adequate knowledge and teaching experience and won't require an Instructor Development Course.

If you currently have adequate content knowledge (e.g., first aid, CPR, AED) and can also demonstrate adequate teaching experience (e.g., professional educator; state EMS, fire, or police instructor; or an instructor from another nationally recognized organization), you are eligible to be "grandfathered" as an ECSI Instructor. You will be asked to list your credentials below.

If you wish to become a new Instructor and are *not* qualified for Instructor "grandfathering," an ECSI representative will contact you with information about the nearest location and dates for an ECSI Instructor Development Course, and you can skip the questions about instructor credentials below.

◉ I **am** eligible to be "grandfathered." I am listing my applicable credentials below.
◯ I **am not** eligible to be "grandfathered." Please contact me about ECSI Instructor Development Courses.

Choose whether or not the instructor can be "grandfathered"

Current Instructor Credentials

- ☑ American Heart Association
- ☑ American Red Cross
- ☐ American Safety and Health Institute
- ☐ Ellis & Associates Instructor
- ☑ EMS Educator
- ☐ Fire Service Educator
- ☐ Law Enforcement Agency
- ☑ Medic First Aid
- ☐ National Safety Council
- ☐ Other Corporate or Professional Educator
- ☑ ECSI Instructor Development Course
- ☐ eACLS (Advanced Cardiac Life Support) Instructor
- ☑ Pediatric First Aid for Caregivers and Teachers (PedFACTs) Instructor

Please list your instructor credentials in d

Current Instructor Credentials

◯ I will fax my credentials (Fax to 866-429-4931)
◯ I will email my credentials (Email to: membership@ECSInstitute.org)

Upload proof of credentials (Only PDF, JPG, BMP, TIFF, and DOC files less than 512 KB in size are accepted)

[Browse...]   [Upload]

8. If you wish to be grandfathered, click **I am eligible to be "grandfathered." I am listing my applicable credentials below.**

9. Select the check boxes for your **Current Instructor Credentials.**

10. List your credentials in the **Please list your instructor credentials in detail** text box.

This information can include statements that demonstrate your expertise and experience. For example: "RN for 5 years, providing CPR training to the public for 3 years," or "EMT for 7 years, providing Pediatric First Aid training for 3."

In addition to the information you enter in the text box, you must supply proof of your credentials either by uploading, emailing, or faxing supporting documents.

11. (option 1) *To upload your credentials* in PDF, JPG, BMP, TIFF, or DOC format, click **Browse** under **Upload proof of credentials…** and then in the **Choose File to Upload** dialog box, select the file or files and then click **Open**. Click **Upload** to complete the upload.

    Note: You can upload more than one file at a time by clicking the first file and then pressing **CTRL** (Windows) or **command** (Mac) and clicking additional files. Note also that files must be less than 512 KB.

    or

    (option 2) *To email or fax your credentials*, click the appropriate option button under Current Instructor Credentials at the bottom of the screen. Emails should be sent to membership@ECSInstitute.org . The fax number is 866-429-4931.

    Note: If you aren't eligible to be grandfathered, you can sign up for an ECSI Instructor Development Course by clicking **I am not eligible to be "grandfathered." Please contact me about ECSI Instructor Development Courses.**

12. *If you want to be grandfathered:* When you have finished filling out all of the fields and have provided either proof of credentials or have selected the fax or email option, click **Submit Application**.

    or

    If you are not eligible to be grandfathered: Make sure you have selected **I am not eligible to be grandfathered. Please contact me about ECSI Instructor Development Courses**, and then click **Submit Application**.
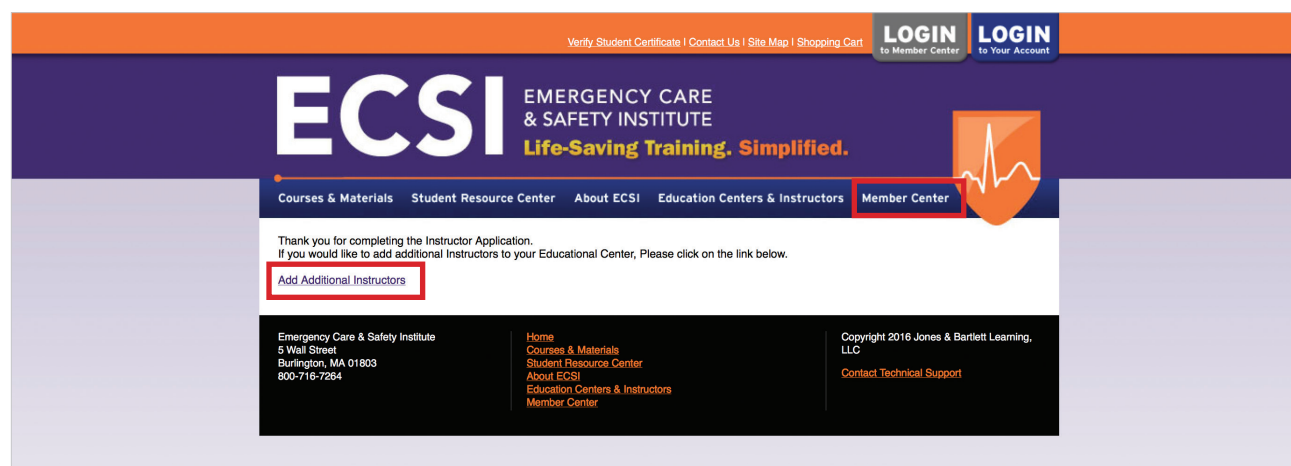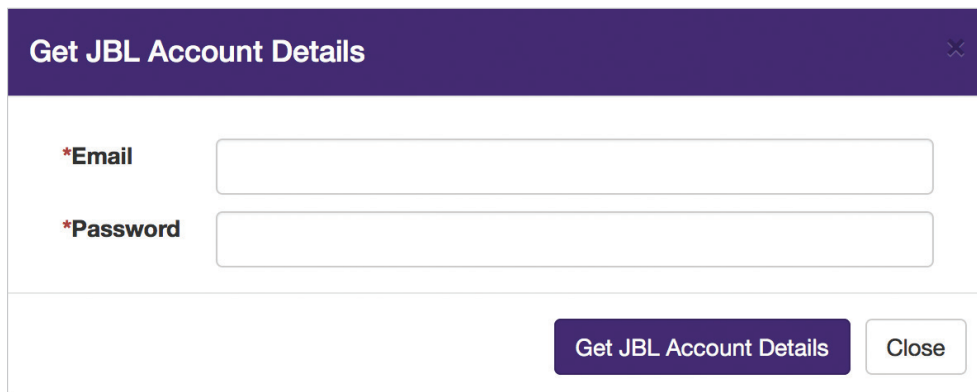
Note: If you are an Administrator and wish to continue to add instructors, click the **Add Additional Instructors** link and repeat the process. To return to the Member Center Home page, click **Member Center** on the right side of the top navigation bar, and on the menu, click **Member Center Home**.

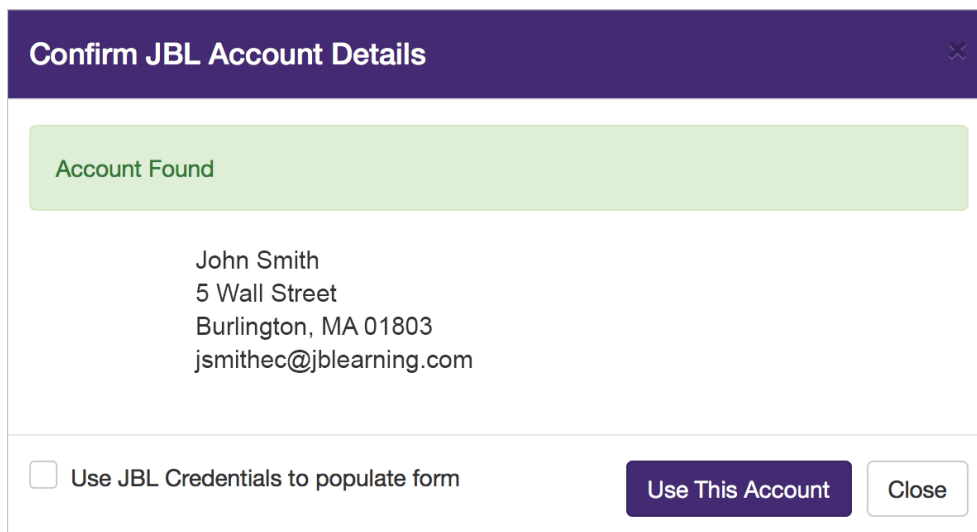# How do I associate an ECSI account with a Jones & Bartlett Learning account?

When you add a new instructor to your education center or add yourself as an instructor, you need to associate the ECSI instructor account with the relevant Jones & Bartlett Learning account. If you don't do so, you or the instructor will be prompted to make the association before managing a roster or managing seats.

When you choose to associate an ECSI website account with a Jones & Bartlett Learning account, the ECSI website displays the following dialog box:

1. Enter your JBL Account Details, including Email and Password, and then click **Get JBL Account Details**.

2. Once the system has found your account, you can choose to use your JBL credentials to populate the form by clicking the **Use JBL Credentials to populate form** check box and then clicking **Use This Account**, or you can simply click **Use This Account** to associate the account, but fill in the fields manually.

As an Administrator, how do I edit my Education Center information?

1. From the Member Center Home, on the left navigation bar, click **Education Center Coordinator Administration** to expand the list of commands.

2. Click **Manage Education Center Information**.

The Manage Education Center Information screen displays the current information for your ed center.

3. Near the bottom of the Manage Education Center Information page, click **Edit**.

All of the ed center information text on the screen becomes editable.

4. Edit the information in the text boxes, and then click **Update**.

Note: To reject your changes, click **Cancel**.

As an Administrator, how do I edit my instructors' information?

1. From the Member Center Home page, on the left navigation bar, click **Education Center Coordinator Administration** to expand the list of available commands.

2. Click **Manage Instructor Information**.

On this screen, you can replace information for each instructor, including City, State, Country, Zip, and Primary Phone. For example, assume some of your instructors have moved from the ed center in Irving, Texas to the ed center in Dallas, Texas. To change information for selected instructors:

3. Click the **check boxes** to the left of the instructors whose information you want to edit.

4. Click the **For** down arrow, and click **City** (for example).

5. Enter the city name you want to replace in the **Replace** text box, for example, **Irving**, enter the new city, for example **Dallas**, in the with text box.

6. Click **Change for Selected**.

   Note: You can also reauthorize instructors by clicking **Reauthorize Selected**, or send instructors certificates in PDF format by clicking **Send Certificate to Selected**.

How do I edit information for an individual instructor?

You can also edit information for an individual instructor by opening a screen that displays their data.

1. From the Manage Instructor Information screen, click the **instructor hyperlink**.

2. On the Edit Instructor screen, make changes by entering new information and course qualifications.

3. Click **Save Changes** and then click **Close Window** to return to the list of instructors for your center.

What levels of permissions can I give my instructors?

To change permission levels for instructors, take the following steps:

1. Click **Education Center Coordinator Administration** in the left navigation bar, and then click **Access Management**. You can give instructors the following permissions:
   - Edit student email after roster is submitted
   - Purchase Seat
   - Submit Roster
   - Create Roster

2. When you have finished granting permissions, click **Save**.

How do I set up a new course?

If you plan to teach a course, you need to purchase seats for that course and then create the classes for which you'll use those seats. After students have taken and passed a class, their seat can be redeemed for a digital Certificate of Completion for that course.

Note: Click here to see an alternative way to create a roster.

1. Click **Seat Management** on the left navigation bar to view a list of possible courses.

    The Courses list is generated by the ECSI website, and includes only those courses (based on available certifications) that can be taught in an ECSI Education Center. The Course Name column lists the courses and the Seats column lists the number of seats available in a particular course. In the screenshot below, 626 seats are available for the Advanced Level First Aid CPR and AED course. In order to use the seats, you create classes. In this example, you could teach 62 classes of 10 students each, and one class with 6 students, or 31 classes of 20 students each, and so forth.

For every course type available, the user or the ed center can purchase resources—for example, eBooks, textbooks, online courses, or manuals. Each resource purchased includes a seat.

2. Once you receive the email acknowledging the purchase (which may take up to 24 hours after the purchase), click the **Enter an invoice id to redeem an invoice** text box, enter the invoice ID, and then click **Redeem**.

    The ECSI website will add seats to the courses for which you've purchased resources. For example, if you have purchased 10 manuals for BLAST (which has 0 seats in the screenshot above), the number of seats on the Courses screen will change from 0 to 10.

3. To create a class, click the course name, for example **Advanced Level First Aid, CPR, and AED**.

   The ECSI website displays the Create Roster screen.

4. Type a **Class Name** and select a **Completion Date**.

   The **Course** (in this case, **Advanced Level First Aid, CPR, and AED**) should be selected by default.

5. To create the class, click **Submit**.

   The ECSI website displays a message that the course has been added to the ed center. At this point, you have two options: You can click the **Click here to add students link** to add students to the course, or you can add the students later by clicking **Manage Roster** for the course on the Roster Management screen.

6. Click **Roster Management** on the left navigation bar to see a list of all of the classes in your ed center.

    Your newly created course should appear at the bottom of the list.

The list includes the following columns:
- **Course Name**, which includes the individual class name as well as the course name
- **End Date** for the course
- **Instructor** (the person who created the roster)
- **Action** with a **Manage Roster** hyperlink for each entry.

The list also includes information about available seats:
- **SUBMITTED** indicates that the class has concluded and the roster has been submitted. It also shows the number of students on the roster.
- **NOT ENOUGH SEATS** indicates that you need to order materials (i.e., seats) to accommodate the number of students on the class roster. To do so, click **NOT ENOUGH SEATS**, and then add seats on the Order Materials screen.
- **[number] SEATS AVAILABLE** which means that you can add students to the class roster up to the number listed.

Why is my roster showing that I have "0 seats available?"

If you plan to teach a course, you will need to purchase the resources for the course and redeem the invoice(s) so that your seats are showing in your account. From there, you are able to create your course. If you have redeemed your invoice(s) and confirmed that your seats are in your account, but your roster is showing "0 seats available," it is likely because the correct course name was selected under the incorrect heading during the course creation process.

During the course creation process, the drop-down menu has headings with corresponding course names beneath. You must choose a course name which is below the heading where your seats are housed. If you purchased our field guides, your "seats" will be housed under the heading "ECSI Refresher Courses," therefore you must choose a corresponding course name under that heading.

Note: If you choose a course name under the "ECSI Refresher Courses" heading, the ECSI Course Completion Card will not state that it is a refresher course. The heading is simply used for organizational purposes.

If you did not purchase field guides, your "seats" will be housed under the heading that matches the title of the resource you purchased. For example, in the screenshot below, this Education Center purchased materials from Standard Level First Aid, CPR, and AED (heading) and is teaching Adult CPR & AED, Standard First Aid (course name).

To ensure your roster is showing the correct number of seats for your course, you can update the course details by following these steps:

1. Click **Roster Management** on the left navigation bar.

2. Click on your course and then click **Edit Course Info**.

3. You will now be able to choose the correct course name under the correct heading in the "Course" drop-down menu.

4. Click **Save**.

How do I create a roster?
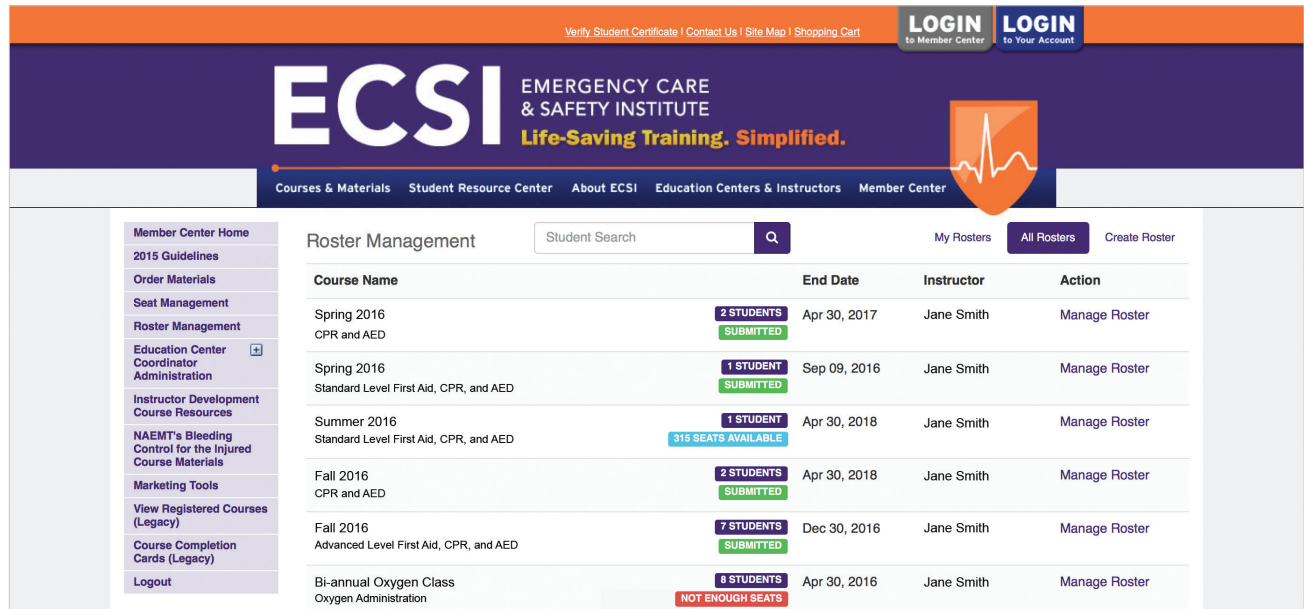
When you set up a new course, you also create a roster. However, there's an alternative method for doing this, as follows:

1. On the left navigation bar, click **Roster Management**.

2. Click the **Create Roster** link near the top of the screen.

3. Enter the information on the Create Roster screen, including class name, completion date, and course.

4. Click the **Submit**.

How do I manage a roster for a course that hasn't yet been submitted?

Once you submit a roster, you can only make changes to a student's email address. However, before you submit a roster, you can add students, remove students, and indicate whether or not a student has passed. To do so, take the following steps:

1. Click **Roster Management** on the navigation bar.

2. From the Roster Management screen, click **Manage Roster** in the row where your class is listed.

The ECSI website displays the screen for your class. On this screen you can specify whether or not a student has passed by clicking the **Passed check box**, or you can click **Remove** to remove a student from the roster. You can also enter new students in the Add New Students section, or you can upload a roster with comma-separated values.

Note: Once you submit a roster, the only field you can modify on the roster is a student's email address. Note also that if you submit a roster and include the name of a student who did not pass the course, that student's seat will be taken away along with the seats of the passed students.

How do I upload, save, and submit a roster?

If you already have student information in a file, or prefer to work in an Excel or text file to enter student data, you can upload the data rather than re-entering it, as long as that data has comma-separated values. Acceptable file types are TXT (text), CSV (comma-separated values), or XLSX (Excel).

If you already have the file, take the following steps:

1. Under Upload Roster on the Manage Students screen, click **Browse**.

2. In the Choose File to Upload dialog box, select the file, and then click **Open**.

3. Click **Upload**.

The ECSI website displays a message indicating that the upload was successful, and fills in the student names and information.

4. To save the roster, click **Save Roster**.

5. If you are ready to submit the roster, click the Passed check box for each passing student, click **Remove** for any students you want to remove from the roster, and then click **Submit Roster**.

   Note: Once you submit a roster, the only student information you can edit is the Email address.
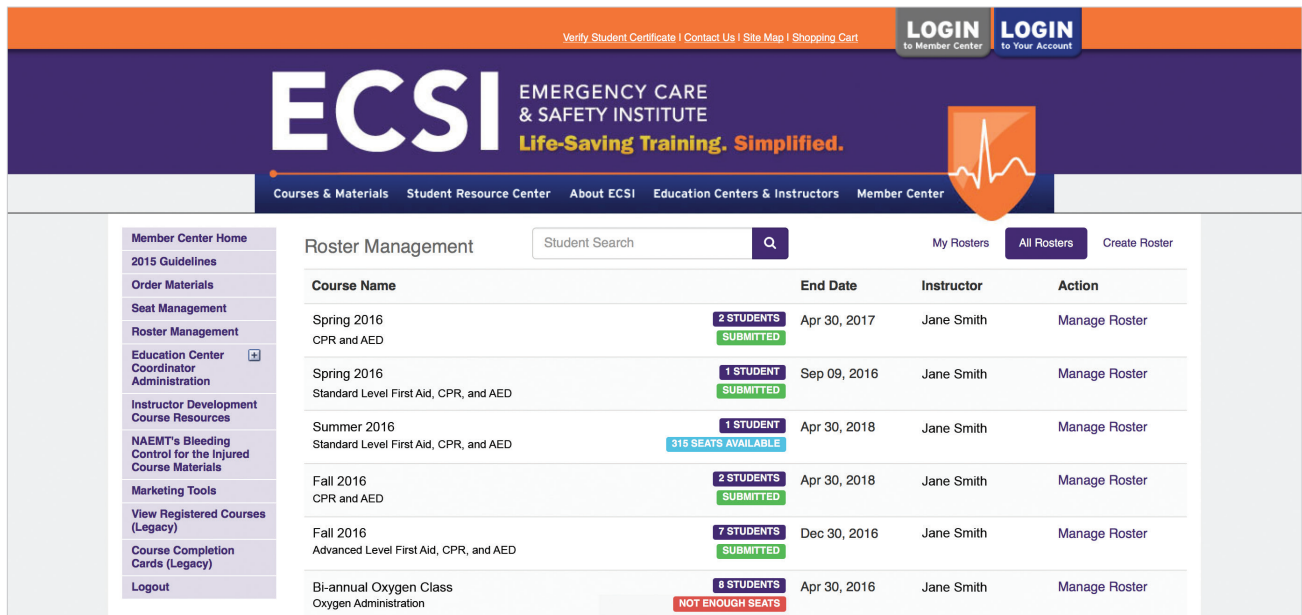
How do I print and download rosters?

If you ever want to print a roster for any reason, use your browser's Print function to print the web page. You should also remember that saved and/or submitted rosters for your ed center are available for viewing on the ECSI website.

How do I obtain digital Certificates of Completion?

Once you have submitted a roster, you can print digital certificates or you can email them. To do so, take the following steps:

1. Click **Roster Management** on the left navigation bar.

Click **Manage Roster** next to your course name (you might need to scroll of the course list is long.)

2. To email or print a certificate or certificates, click the Email and/or Print check boxes next to each student's name, or click the **Email** and/or **Print** check boxes next to **Pass All**.

3. Click **Update Roster**.

ECSI displays a Certificate of Completion in the Web browser for the first student listed on the roster. It opens additional browser tabs for each additional student.

4. Point to the bottom of the certificate until you see icons for saving and printing the certificate.
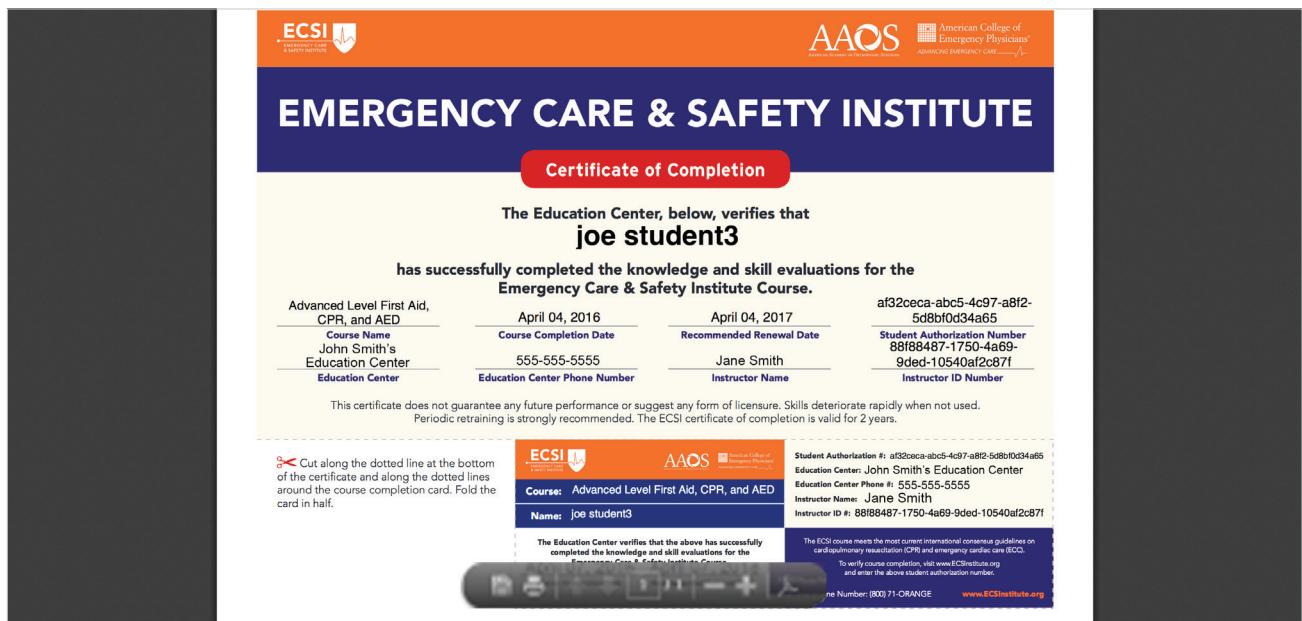
5. Click the **Save a copy icon** to save the certificate on your hard drive, or click the **Print icon** to open the Print dialog box on your computer and print the certificate.

How can I reprint or email a student a Certificate of Completion?

To reprint or email a certificate, follow these instructions.

What is the difference between "redemption history" and "usage history"?

You can see details about seats purchased (Redemption History), by clicking **Seat Management** on the left navigation bar, and then clicking the **Redemption History** link for a course.

The Redemption History screen displays information about the Invoice ID, Purchase Date, Redeemed Date (when someone entered an invoice ID to add the seats to the Ed Center), the number of seats, and the name of the instructor or administrator who redeemed the seats.

You can also see information about the seats that have been used (when instructors submit rosters) by clicking the **Usage History** link for a course.

The Usage History screen lists the Course Name, Seats, and information about who submitted the seats and when. The easiest way to think about redemption vs. usage is that redeemed seats are "incoming seats" (available seats) in your ed
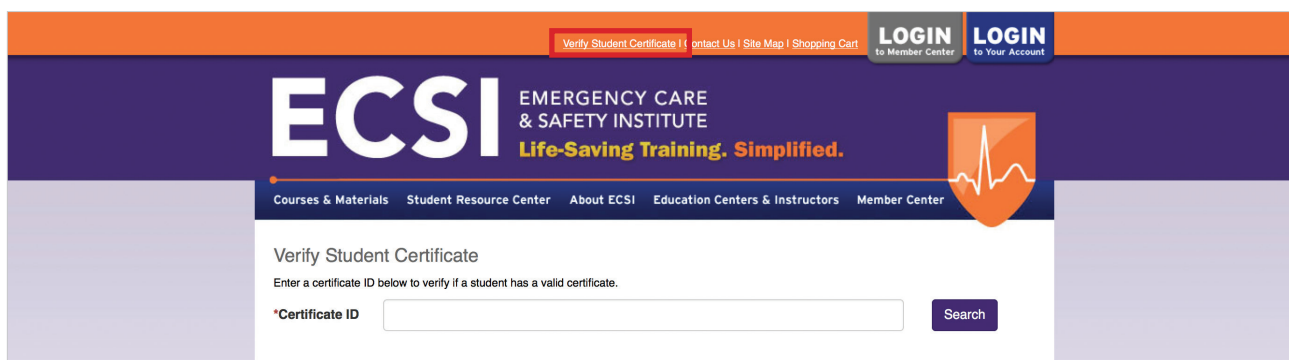
center, whereas used seats are "outgoing seats," or seats that are no longer available.

Note: An Administrator can also access this information by clicking **Education Center Coordinator Administration** on the nav bar, and then clicking either **Redemption History** or **Usage History**.

How can a regulatory agency or employer verify the validity of a Certificate of Completion?

Oftentimes, an employer or regulatory might want to verify the legitimacy of any certificates you submit. They can do so by taking the following steps.

1. Go to **ecsinstitute.org**.

2. On the orange title bar, click the leftmost link, **Verify Student Certificate**.

3. Enter the certificate ID in the **Certificate ID** text box.

4. Click **Search**.

    ECSI will display one of three messages indicating that:
    - The certificate is valid until a specified date.
    - The certificate has expired.
    or
    - The certificate ID is invalid.

How do I find a student to either edit the student's email information or re-send a digital Certificate of Completion?

Long after you have taught a class you might receive a request from a student. Given that your ed center most likely processes hundreds of students a year, it might be difficult to remember which class the student was enrolled in. This is an easy problem to solve.

1. Click **Roster Management** on the left navigation bar.

2. In the **Student Search** text box at the top of the screen, type the student's last name.

3. Click **Search**.

    ECSI displays a list of students with the name you entered.

4. On the student list, next to the name of the student you want, click **View Roster**.

5. Click the **Email** check box for the student.
6. Click **Update Roster**.

How do I order materials?

The ECSI website makes it easy to order materials for your classes.

1. Click **Order Materials** on the left navigation bar.

   The Order Materials screen lists the available materials for every course.

2. Click to select the check boxes for the materials you want to order.

3. Click **Purchase Items**.

   The items you chose are added to your shopping cart.

4. Specify the Quantity for each item, and then click **Update**. (The quantity is 1 by default.)

5. Enter a promotion code, if available, and then click **Apply to Order**.

6. Click **Checkout.**

   Note: If you have not finished selecting items, you can also click **Continue Shopping** to return to the list of materials.

7. Sign into the system or create a new account.

8. Follow the onscreen instructions, which include entering customer and payment information, reviewing your order, and confirming your order.

   Note that you may not receive the invoice and confirmation of your order for up to 24 hours. Once you do receive it, you can redeem your seats.

9. (optional) Click **Member Center** and then click **Member Center Home** to return to the home screen.

How do I log out of the ECSI website?

To log out of the ECSI website, click **Logout** on the left navigation bar.