Alberta Agriculture and Forestry

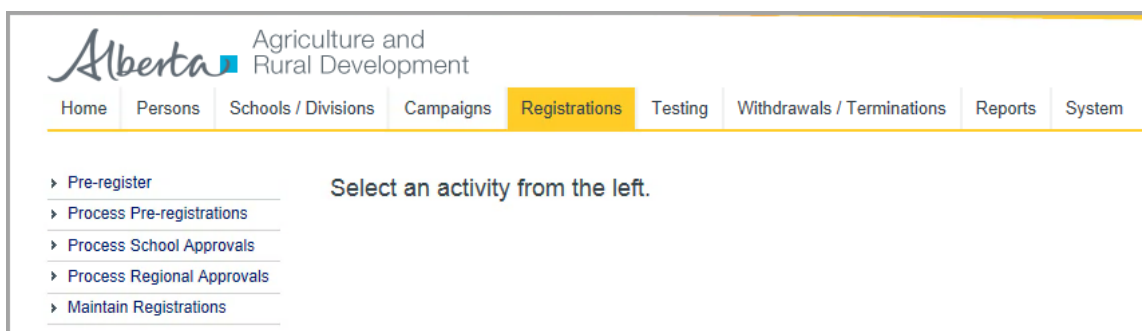# Registration and Approvals
Training Manual
GINA

Revision Date:

1 August 2018

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INTRODUCTION

The *Registration* menu allows you to process pre-registrations and registrations. A **pre-registration** is a registration that has been entered but not submitted yet. Once the pre-registration is submitted it becomes a registration. School, division and regional coordinators and Green Certificate program administrators have access to this functionality.

- The *Pre-register* activity allows you to create a new pre-registration for a trainee.
- The *Process Pre-registrations* allows you to edit an existing pre-registration.
- *Process School Approvals* allows you to enter approval information for registrations with a status of Pending School Approval.
- *Process Regional Approvals* allows a regional coordinator to enter approval information for registrations with a status of Pending Regional Approval.
- The *Maintain Registrations* activity allows you to search for registrations.

Registration Business Process

The registration process shown below describes the 'happy path' that a registration follows from initial entry to becoming active. The 'happy path' is the sequence of activities when everything goes as expected and there are no errors or exceptions.
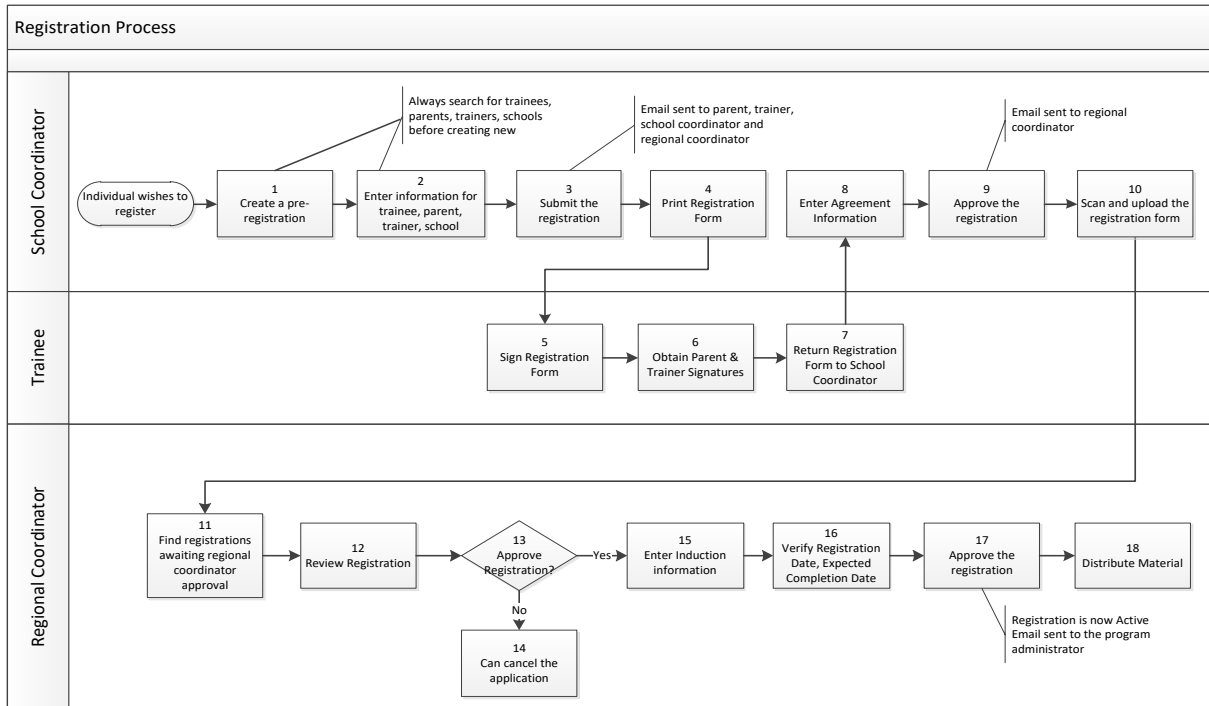

Figure 1: Registration Process Diagram

Registration Status Flow

The status diagram below shows how a registration moves from one status to another within GINA. Registrations start with a status of Pre-registration and when they are submitted the status changes to Pending School Approval. It appears on the dashboard of the school coordinator linked to the registration. When the school coordinator approves the registration the status changes to Pending Regional Approval. It then appears on the dashboard of the regional coordinator linked to the registration. When the regional coordinator approves the registration the status changes to Active.

Prior to the registration being made active it can be cancelled. Once the registration is active it can be completed, withdrawn or terminated.

Special Note – Although registrations are made active via the Regional Coordinator's approval, the invoicing workflow requires that the registration has received the Financial Coordinator's approval for invoicing, prior to treating the registration as truly an active registration. In other words, if the registration has not yet been approved for invoicing, invoicing reports/processes do not consider the registration to be completely active.
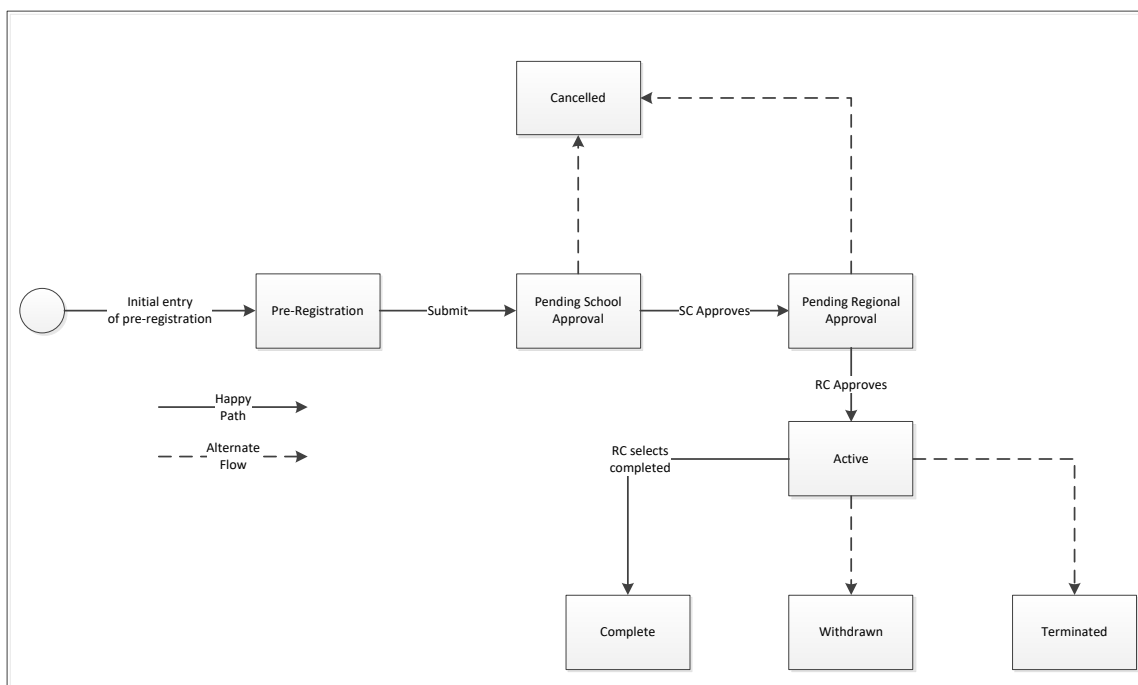
Figure 2: Registration Status Flow

Data Entry & Searching

The GINA methodology is "Enter Once, Use Many Times".

Information is entered into GINA once and then can be used multiple times and in multiple ways. For this reason it's very important that you search for information before you create new information. Searching will reduce the duplicate information in GINA, provide for more efficient processes and ensure more accurate reporting. By searching first it will lessen the time required to enter the information if it is already there. Let's look at an example:

Trainee and Registration information:

- Joe Smith would like to register for the Field Crop program.
- The school coordinator will create a pre-registration and will search to see if Joe Smith already exists in GINA.
    - o If he does then his personal information will be confirmed and updated as needed. There is no need to type it in all over again.
    - o If he does not exist the school coordinator will enter the personal information for Joe.
- Now the Field Crop pre-registration and personal information for Joe are linked in GINA.
- When a test period is coming up the regional coordinator will search for registrations for that test.
    - o The regional coordinator can include the existing registration for Joe in the test.
- Joe attends the test and his marks are given to the regional coordinator.

- o The regional coordinator will search for Joe's registration and add the marks to that existing registration for the specific test.
- The regional coordinator now needs to send an email to all active Field Crop trainees.
  - o The coordinator can search for the active Field Crop registrations and Joe will be included in the list.
  - o The coordinator can implement a campaign to send an email directed to these specific trainees.
- Next year Joe decides he would like to register for the Irrigated Crop program.
  - o The school coordinator will create a new pre-registration and search for Joe's personal information. It will be found and linked to the new Irrigated Crop registration. Joe's personal information can be updated but should not be created again.

The registration is the entity that gives you a complete picture of Joe in the Field Crop program. From that registration you can see the trainee, parent, trainer and school information; you can see when he started in the program; you can see the test marks, when he tested and who the tester was; you can see when he completed the program. All of this information is linked to the single Field Crop registration for Joe Smith. The same is true for the Irrigated Crop registration for Joe.

Email Address

Email addresses for people within GINA are not required. If they are entered they must be unique. For example, the same email cannot be added to a trainee and a parent. In this scenario it is recommended to put the email on the trainee. You can see a warning message on screen if the person does not have an email address.

GINA will send out several emails as a registration is moved through its natural lifecycle. If a person does not have an email address then the email will not be sent.
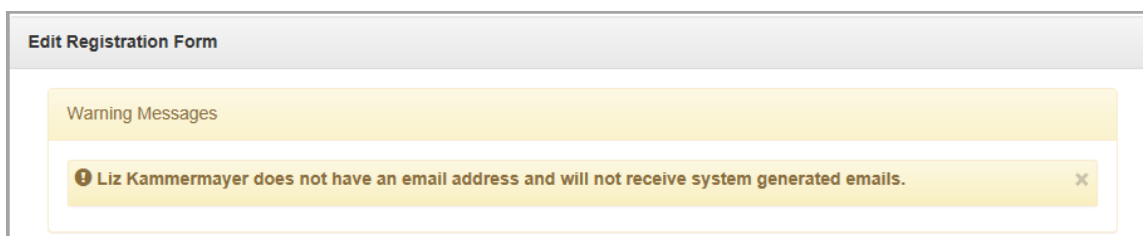

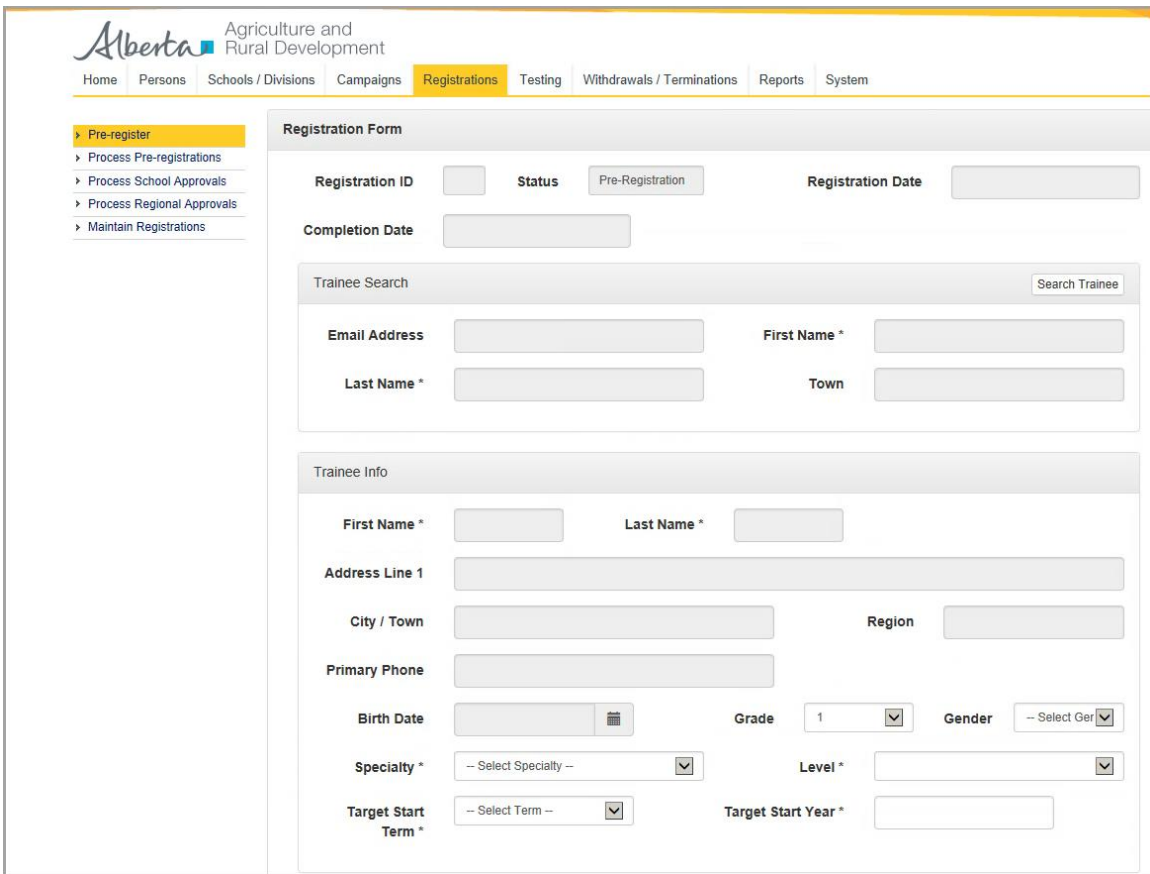**Figure 3: Email Warning Message**

ENTER A PRE-REGISTRATION

Pre-registrations are entered by the school or regional coordinator, on behalf of the trainee.
You can click *Save* at any time and return later to finish entering the information. If you close the screen or log out any information that has not been saved is lost.

1. Click the *Registration* menu and the *Pre-register* activity to enter a new pre-registration.

2. A new registration form is displayed. The *Status* is initially set to Pre-Registration. The *Registration ID*, *Registration Date* and *Completion Date* are set by the system. These fields are read only.

   The form is broken in to sections that will be described below.

Trainee Information

1. Click *Search Trainee* to find the trainee. The *Select Person* popup is displayed.

Select Person

Last Name	Middle Initial	First Name	Town

Stakeholder Types ▾ | Last Name | First Name | -- Select Town/City -- ▾ | 🔍

⟳ Refresh   ⏮ ◀◀ Page 1 of 0 ▶▶ ⏭ 25 ▾   No records to view

✔ Select   ➕ Add   ☑ Edit

2. The default search is for Contact Stakeholders. Enter a Last Name, First Name and/or Town to narrow the search. Click *Search* to run the search.

Select Person

Stakeholder Types ▾ | charles | First Name | -- Select Town/City -- ▾ | 🔍

3. The results are displayed. If the trainee is not found then you can create the trainee by clicking *Add*. You must search for the person before the *Add* button is enabled. See the Maintain Person training manual for information about adding people.

> **IMPORTANT**
>
> It is important to search for a person before adding a new person because we do not want duplicate information entered into GINA.

4. Click the row for the appropriate trainee and it is highlighted in yellow. Click *Select*.

5. The *Select Person* popup closes and the selected trainee information is displayed on the registration form.

Registration Form

Registration ID		Status	Pre-Registration	Registration Date	
Completion Date					

Trainee Search — Search Trainee

Email Address	noracharles@ard.com	First Name *	Nora
Last Name *	Charles	Town	St. Paul

Trainee Info

First Name *	Nora	Last Name *	Charles

Address Line 1	Box 555		
City / Town	St. Paul	Region	Northeast
Primary Phone	780-555-8965		

Birth Date	2000-05-11	Grade	1	Gender	Female
Specialty *	-- Select Specialty --		Level *		
Target Start Term *	-- Select Term --		Target Start Year *		

6. Fill out the remaining Trainee information. Select the *Specialty*, *Level*, *Target Start Term* (Fall, Winter or Summer term in which the trainee will start training) and enter the *Target Start Year*.

Parent Information

1. Click *Search Parent* to find the parent.

Parent Information — Search Parent | Remove Parent

First Name	Last Name	City/Town
First Name	Last Name	City/Town

☐ Parent is Primary Trainer?

2. The *Select Person* popup is displayed. Enter search criteria and click *Search*.

Select Person

Stakeholder Types ▾	charles	First Name	-- Select Town/City --	🔍

3. The results are displayed. Click the row for the appropriate parent and it is highlighted in yellow. Click *Select*. If the parent is not found then you can create the parent by clicking *Add*.

4. The *Select Person* popup closes and the selected parent information is displayed on the registration form.

Primary Trainer Information

The primary trainer is the person responsible for teaching the trainee. The primary trainer could be the parent or another individual.

1. If the parent is the trainer then click *Parent is Primary Trainer* and the parent details are displayed in the primary trainer information section.

2. If the parent is not the primary trainer then click *Search Trainer*.

3. The *Select Person* popup is displayed. Enter search criteria and click *Search*.

4. The results are displayed. Click the row for the appropriate trainer and it is highlighted in yellow. Click *Select*. If the trainer is not found then you can create the trainer by clicking *Add*.

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5. The *Select Person* popup closes and the selected primary trainer information is displayed on the registration form.

Enter Training Site Information

The training site is where the actual training takes place. It can be either the address of the primary trainer or a different physical site.

1. If the site is the same as the trainer's address then click *Trainer's Address is the Physical Training Site*.

Primary Trainer Information			Search Trainer	RemoveTrainer

First Name Rob **Last Name** Walsh **Town** Elk Point

Farm / Business Name

Address Line 1 Box 555

City / Town Elk Point **Region** Northeast

Primary Phone 780-555-6589
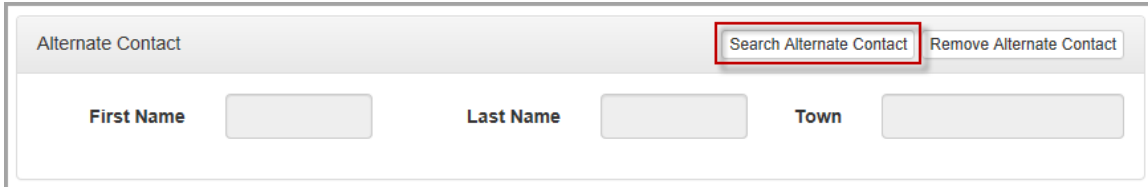
☑ Trainer's Address is Physical Training Site?

2. If the site is not the same as the trainer's address then click *Search Site*.

Site Information		Search Site	Remove Site

Site Name Willowby Farms **City/Town** St. Brides

3. The *Select Site* popup is displayed. Enter search criteria and click *Search*.

Select Site

-- Select Region --   willow%   -- Select Town/City --   🔍

4. The results are displayed. Click the row for the appropriate site and it is highlighted in yellow. Click *Select*. If the trainer's site is not found then you can create the site by clicking *Add*.

5. The *Select Site* popup closes and the selected trainer site is displayed on the registration form.

Alternate Contact

An alternate contact (secondary contact for the registration) is optional. An alternate contact for the registration can be entered by clicking *Search Alternate Contact*.

Alternate Contact			Search Alternate Contact	Remove Alternate Contact
First Name		**Last Name**		**Town**

School Information

A school must be linked to a pre-registration so the system knows which school the trainee is attending.

The school must exist already. You cannot add a new school in this process. If you cannot find the school check the spelling of the name. Try using the wildcard '%' in the name. Use the region, or division or town instead of the school name.

If the school has not been defined you will need to close this process, create the school and come back to enter the pre-registration.

1. Click *Search School* to find the school that the trainee is attending.

School		Search School	Remove School
School Name		**Town**	

2. The *Select School* popup is displayed. Enter search criteria and click *Search*.

Select School

-- Select Region -- | -- Select School Division -- | St paul | -- Select Town | 🔍

3. The results are displayed. Click the row for the appropriate school and it is highlighted in yellow. Click *Select*.

4. The *Select School* popup closes and the selected school is displayed on the registration form. The primary school coordinator for the selected school is also shown.

Change the School Coordinator for the Pre-registration

When a school is selected the primary school coordinator is displayed on the registration form. You can optionally change the school coordinator. If the school has more than one Green Certificate coordinator you can choose one other than the primary coordinator.

1. Click *Search School Coordinator* to change the coordinator for this pre-registration.

School Coordinator Information						Search School Coordinator
First Name	Nick		**Last Name**	Charles	**Town**	St. Paul

2. The *Select Person* popup is displayed. Enter search criteria and click *Search*.

Select Person

Stakeholder Types ▾	Last Name	First Name	-- Select Town/City -- ▼	🔍
☑ School Coordinator	Middle Initial	First Name	Town	

3. The results are displayed. Only persons with the role of School Coordinator at the school linked to the pre-registration are returned. Click the row for the appropriate school coordinator and it is highlighted in yellow. Click *Select*. If the school coordinator is not found then you can create the person by clicking *Add*.

Select Person

Stakeholder Types ▾	Last Name	First Name	-- Select Town/City -- ▼	🔍

Last Name	Middle Initial	First Name	Town
Charles	VA	Nick	St. Paul
Wentworth	VA	Fred	St. Brides

↻ Refresh ◄ ◄◄ Page 1 of 1 ►► ► 25 ▼   View 1 - 2 of 2

✔ Select   ✚ Add   ☑ Edit

4. The *Select Person* popup closes and the selected school coordinator is displayed on the registration form.

Submit a Pre-registration

A pre-registration can be submitted by clicking *Submit* at the bottom on the registration form. The information entered is validated by GINA first and if all information is correct the pre-registration is automatically submitted and the status changed to Pending School Approval.

An email and notification are sent to the school coordinator and to the regional coordinator. An email is sent to the parent and the trainer if they have an email address.
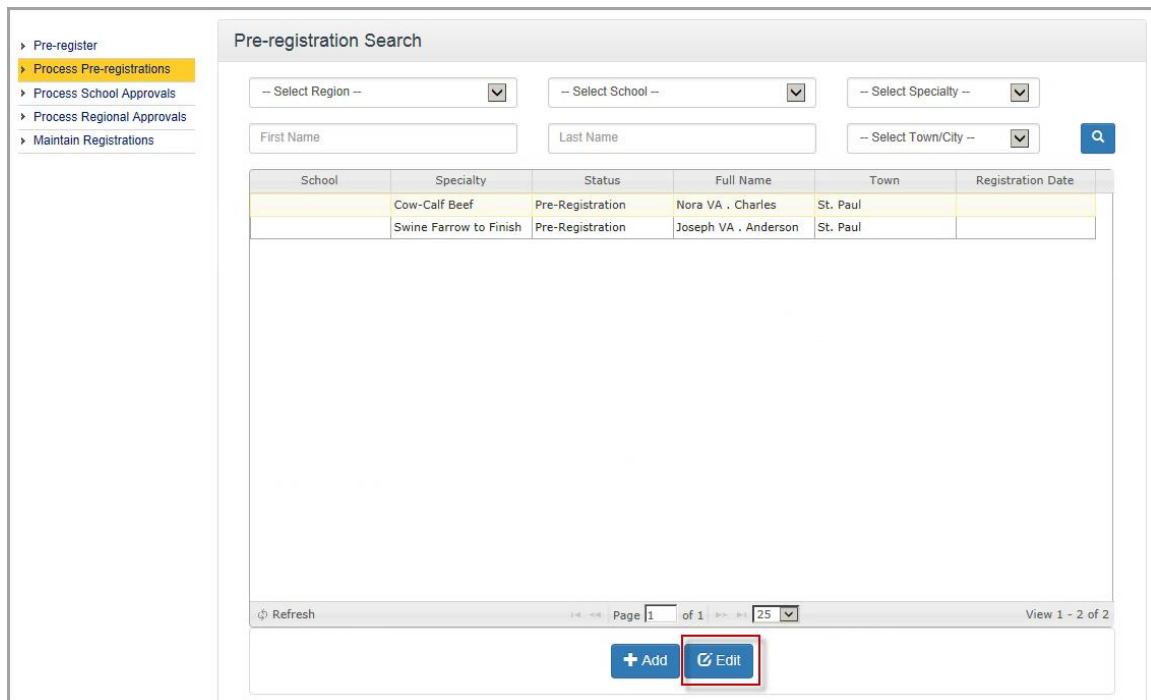
![Alberta Agriculture and Forestry logo]

P ROCESS P RE - REGISTRATIONS

A pre-registration can be saved without all of the data filled in and without being submitted. The school coordinator can return to it at a later time to complete the data entry.

> ⚠️ **IMPORTANT**
> You can see pre-registrations that you created. School coordinators can see pre-registrations that are linked to their school. Regional coordinators can see all pre-registrations.

1. Click *Process Pre-registrations* and a list of all pre-registrations that you have access to is displayed.

2. Select the pre-registration and click *Edit* to continue entering the pre-registration for the trainee.
3. A new pre-registration can be created by clicking *Add*. It is important to search first so duplicates are not created.

UPLOAD A DOCUMENT

Documents can be uploaded and attached to a specific registration. Examples of this include:

- Scanning the signed registration form and uploading
- Letters or formal communication with the trainee
- A copy of the trainee's certification

School coordinators, regional coordinators and program administrators can upload a document to a registration and view the document. Files cannot be deleted once they are attached and saved to the registration.

1. Search for and edit the registration.

2. Click *Add Files* to upload a new file to this registration.
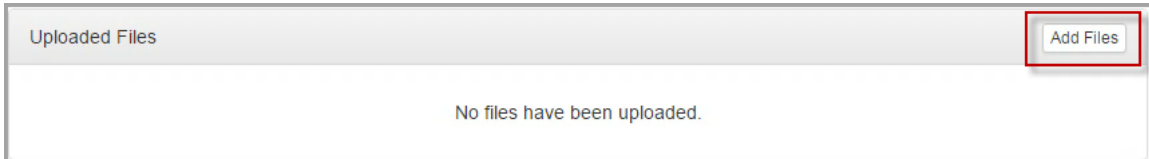
3. The *Upload Attachments* popup is displayed. The file names and acceptable file types are explained in the popup.

    Click *Choose File* to find the file to upload.
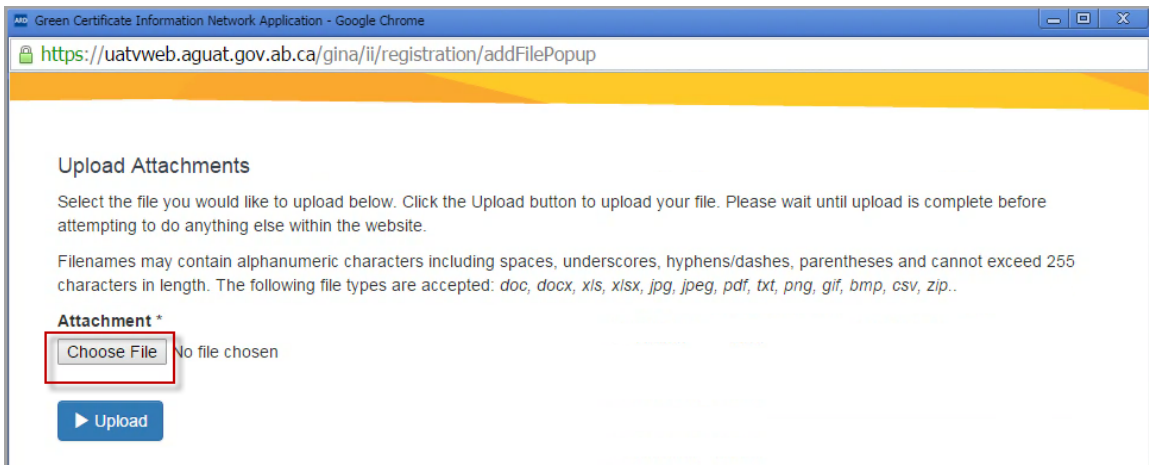
4.   The *Open* popup is displayed. Find the file you want to upload and click *Open*.

Files must be uploaded one at a time. You cannot select more than one file.
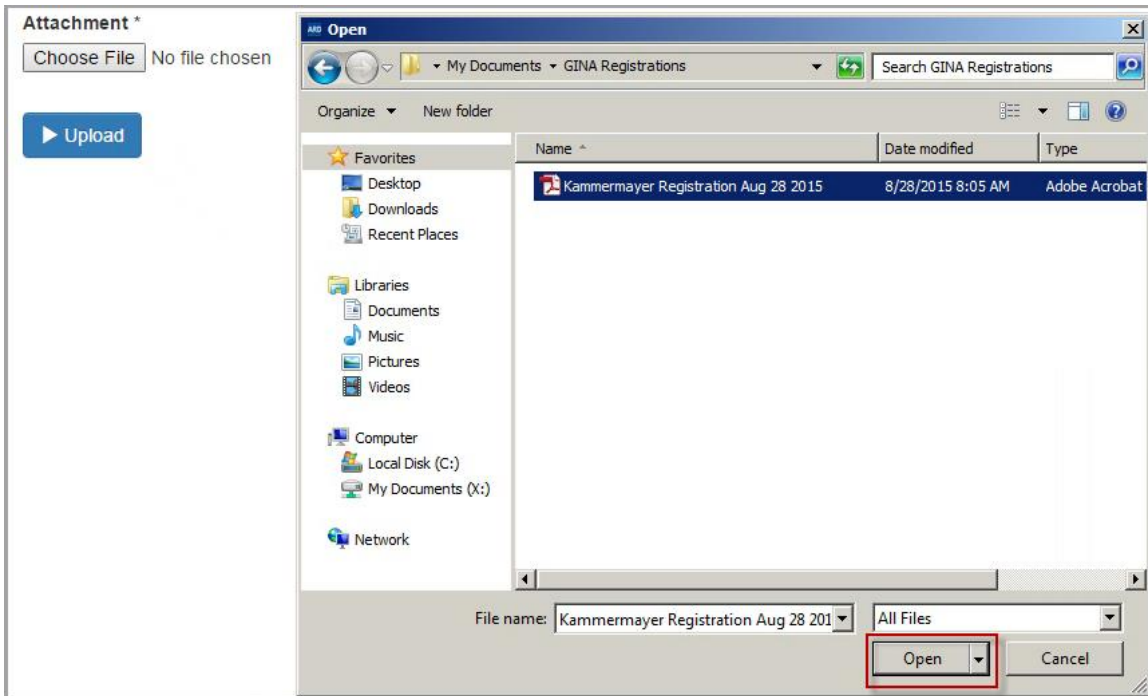
5.   The Open popup is closed and the file name is displayed on the Upload Attachments popup. Click *Upload* and wait for the popup to close.
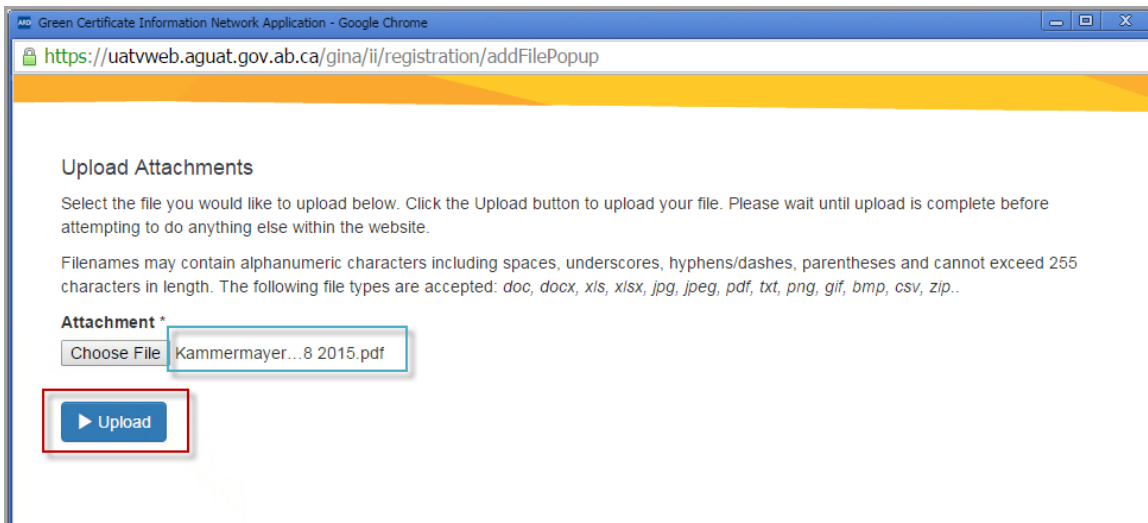
6. The file is attached to the registration. Click *Save*. Files cannot be deleted once they are saved to the registration.

Uploaded Files		Add Files
File Name	**Date Uploaded**	
Kammermayer Registration Aug 28 2015.pdf	2015-09-03 10:02:50	Download File

7. To view an attached file click *Download File*.

PROCESS SCHOOL APPROVALS

Once a pre-registration has been submitted it must be approved by the school coordinator. The form must be printed and signed by the trainee, parent, trainer and school coordinator.

1. The school coordinator's home dashboard indicates if there are registrations to process. Click *Process School Approvals*.
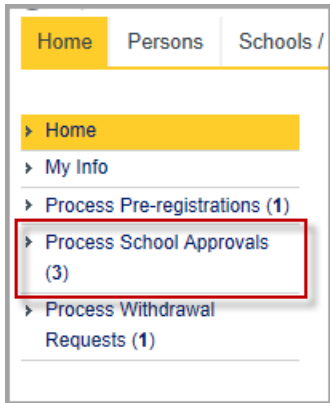
2. The *Pending School Approval Registrations Search* form is shown. The list of registrations requiring your review is displayed. Select the registration and it is highlighted in yellow. Click *Edit*.

3. The registration form is displayed and includes further school information is shown to you. This information is read only.

4. At the bottom of the form is a section for School Coordinator Approval.

5. Click *Print Registration Form*. A PDF is created and you have the option to open or save the file. Obtain the signatures of the trainee, parent and/or trainer. You must also sign the form. The signed paper form must be kept.

    If required, you can click *Email Signature Notification* to email the parent and trainer, if they have an email address. This informs them that the trainee is registering, a printed form is coming home and they will need to sign it and return it to the school coordinator.

6. When signatures have been obtained click on the box next to the individual and enter the date of the signature. The school coordinator is validating that all parties have agreed to their role and responsibilities as outlined in the Green Certificate curriculum.

School Coordinator Approval

☑ Trainee Signature   2015-05-07

☐ Parent Signature   Signature Date

☑ Trainer Signature   2015-05-04

☑ School Coordinator Signature   2015-05-07

🖶 Print Registration Form   📢 Email Signature Notification

7. If the induction has occurred click *Induction Performed*, enter the *Induction Date* and select the *Training Material Version* (Green Certificate workbook).

Induction

☐ Induction Performed?

Induction Date [   ]   **Training Material Version** [-- select document -- ▼]

8. To approve the registration click *School Coordinator Approved*. The registration status changes to Pending Regional Approval. The registration appears on the dashboard of the appropriate Regional Coordinator.

To cancel the registration click *School Coordinator Reject*. The registration status changes to Cancelled.

👍 School Coordinator Approved   👎 School Coordinator Reject   ✔ Save   ⊘ Close

An email and notification are sent to the regional coordinator when the registration is approved.

PROCESS REGIONAL APPROVALS

Once a registration has been approved by the school coordinator the regional coordinator must review and approve it.

1. The regional coordinator's home dashboard indicates if there are registrations to process. Click *Process Regional Approvals*.
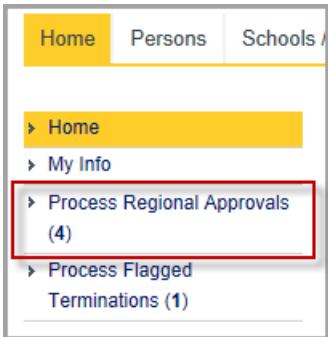
2. The *Pending Regional Approval Registrations Search* form is shown. The list of registrations requiring your review is displayed. Select the registration and it is highlighted in yellow. Click *Edit*.

3. The registration form is displayed. At the bottom of the form is a section for Regional Coordinator Approval.

The *Registration Date* defaults to the current date. The *Target Completion Date* defaults to the current date plus 3 years. In accordance with Green Certificate policy the regional coordinator can adjust these dates as needed. Always verify these dates and change as needed.

Regional Coordinator Approval			
Registration Date	2015-05-12	**Target Completion Date ***	2017-05-12

4. If the induction information has not been entered you must enter it now.

> **Tip** You cannot approve the registration if the induction information has not been entered.

5. To approve the registration click *Regional Coordinator Approved*. The registration status changes to Active.

To cancel the registration click *Regional Coordinator Reject*. The registration status changes to Cancelled.

Regional Coordinator Approved	Regional Coordinator Reject	Save	Close

An email and notification are sent to the Program Administrator when the registration is approved.

The notification sent to the Program Administrator indicates that the invoicing workflow is now starting for the registration. The invoicing workflow ensures that the proper reviews and signing authorities are captured, prior to sending the data to the IMAGIS system (i.e. Government of Alberta Financial system) for the physical creation of a paper invoice to the school or school division.

MAINTAIN REGISTRATIONS

Registrations at any point in their life-cycle can be viewed and updated using the *Maintain Registrations* activity.

> ⚠️ **IMPORTANT**
>
> You can see registrations that you created. School coordinators can see registrations that are linked to their school. Regional coordinators can see all registrations.

1. The default displays registrations with a status of Active that you have access to.

2. You can change the search criteria and click *Search* to find different registrations. The example below displays registrations at Johny Bright School where the registration status is withdrawn.

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3. Select the appropriate row and it is highlighted in yellow. Click *Edit* to display the registration.

4. A new pre-registration can be created by clicking *Add*.