Student Records
SLCM_AD_310

IRIS
Integrated Resource
Information System

Course Instructions

IRIS
Integrated Resource
Information System

- Click **Attachments** (upper right corner)

- Click **QRC Course Navigation** pdf

- Print the pdf

- Use the pdf to navigate the course and take the Assessments at the end of each unit

Course Content

This course is intended for end-users in colleges and other departments who update student information. Most transaction will be completed via the *myUK* portal, although some users will have access to the IRIS Production system (SAPGUI). Content includes viewing class rolls, unofficial transcripts, student file and master data, holds, majors/minors, programs of study, progression results, addresses, and emergency contact information.

- Introduction
- Unit 1 – Student Administration Tab
- Unit 2– Student File vs. Student Master Data
- Unit 3 – Student File
- Unit 4– Student Master Data
- Course Summary

Learning Objectives

- Upon completing this course, you will be able to:

  - Understand the difference between Student File and Student Master Data
  - Create/activate/inactivate holds
  - View progression results
  - Create/change student addresses
  - Create/change advisor
  - Create related person
  - View student records via myUK Portal

Prerequisites and Roles

- Prerequisites
  - UK_100 IRIS Awareness & Navigation
  - SLCM_200 Student Lifecycle Management Overview

- Roles
  - Student Lifecycle Management End Users
  - Admission/Registrar Office

Access

- In order to access student records, the user needs:
  - To complete the **SLCM_AD_310 Student Records** course and pass the assessment
  - To be designated as a person with the responsibility for managing student records
  - To sign the Statement of Responsibility (SOR)
    - Instructions available at:
      http://www.uky.edu/IRIS/train/SOR_Information.html
    - If you have signed the SOR in UK_100, you do not need to sign it a second time

Access

- The access you receive for this course will be specific for your needs.

- You may not be able to access every transaction described in the course.

- If you do not have all the access you feel you need, please work with your college contact to get this access assigned
    - The college contact list is located at http://www.uky.edu/IRIS/CM/cm_group.html

Student Records

- Student records may be accessed using either the **PIQST00** transaction in **IRIS Production** or **Student Administration** Tab via the *myUK* portal.

- Examples include:

Student Administration Tab	PIQST00
Inactivate Advisor holds only	Activate/inactivate all holds
Change addresses	Create/change addresses
View/print student schedule	Create/change advisors
View/print class rolls	View external transcripts/tests
View/print unofficial transcripts	View/create/change program of study, majors, minors, etc.
Book students	View progression results
Grade students	View requirement catalogs
Override course restrictions	View/create/change status
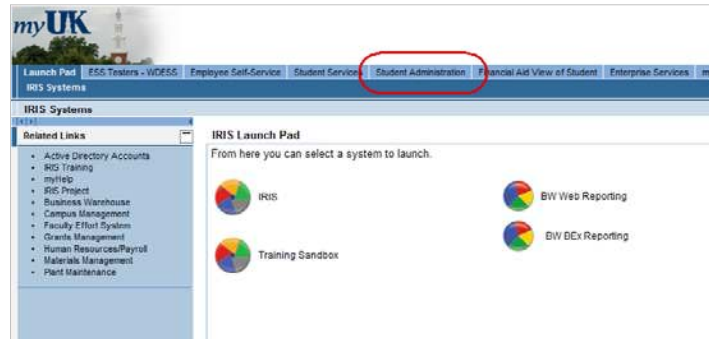
Student Administration Tab

Unit 1– Student Administration Tab

- Class Rolls
- Unofficial Transcript
- Student Self–Service Tips

Student Administration Tab

- It is easier to find and display basic student record information in the myUK portal than in the IRIS system.

- However, not everything can be done in the portal.
  - For example, you can **see** Holds and Stops, but you cannot **create** them in the portal.
  - Holds can only be **created** in the IRIS system.

Student Administration Tab

- The **myUK portal** provides different views and information for different users depending on their security access.
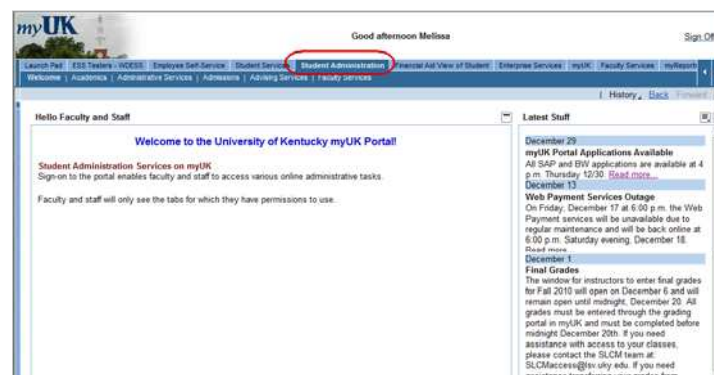
Class Rolls

- Class rolls can be viewed and printed by authorized faculty and staff from the portal.

  - They may be viewed and/or printed at various times before and during the semester to have up-to-date information about students who are officially enrolled in a course.

- Use the following steps to view or print class rolls.

  - Click **Faculty Services**
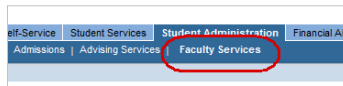
  - Click **Class Rolls**

Class Rolls

- To choose the appropriate Academic **Year/Term**, click on the drop-down list icon

- Double-click on the appropriate year and term
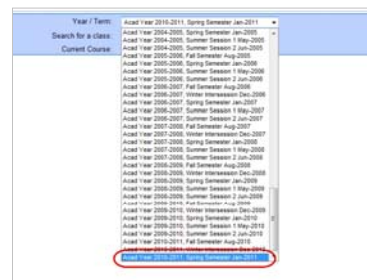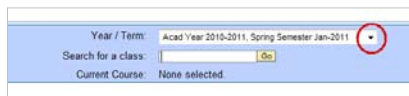
Class Rolls

* You can search for the Course Subject and Number in one of the following ways:

  * Course Subject & Number, such as ENG 104

  * Course Subject, such as ENG

  * Part of the course title, such as Writing

Class Rolls

* Type in the course subject and number in the **Search for a class** field

  * **Note:** Remember when typing a two-digit course subject, you will need to type **TWO** spaces before you type the course number!

* Click **Go**

SLCM_AD_310 Student Records   8

Class Rolls

- **Note:** A list of all possible class rolls for the course will display.

- Click on the appropriate course and section link

- **Note:** Section information includes:
  - Meeting times
  - Location (if available)
  - Instructor (if available)

Class Rolls

- **Note:** Roster information includes:
  - Student name
  - Student number
  - Username
  - Email address
  - Degree
  - Major/Minor
  - Classification
  - Hour(s)
  - Status

Class Rolls

- Click **Print** to print the roster

- Click **Export to Excel** to download the roster to an Excel spreadsheet
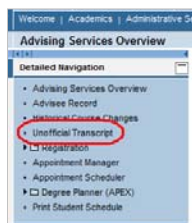
Unofficial Transcript

- Use the following steps to view and print a student's **Unofficial Transcript**.

  - Click on **Advising Services**
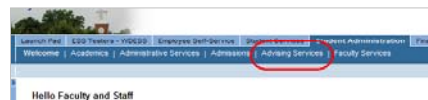
  - Under the **Detailed Navigation** menu (on the left side of the screen), click on **Unofficial Transcript**

Unofficial Transcript

- Use the **Enter Search Criteria** screen to search for the student by:

    - User name (AD User ID)
    - Last name
    - First name
    - Student number (IRIS-generated Student ID number)

- Click on the **Search** button

- On the list of possible matches, locate the row of the student whose unofficial transcript you wish to view, then click on the **Transcript PDF link** in that student's row

Student Number	First Name	Middle Name	Last Name	Name at Birth	Date of Birth	
10037714	Derek	Henry	Pitt		1955-03-03	Transcript PDF
10037856	DEREK		PITT		1980-12-15	Transcript PDF

Unofficial Transcript

- The transcript will be displayed as a PDF document.

- **Note:** Click the red **Close** icon in the top-right corner of the screen to close the PDF version of the student unofficial transcript.
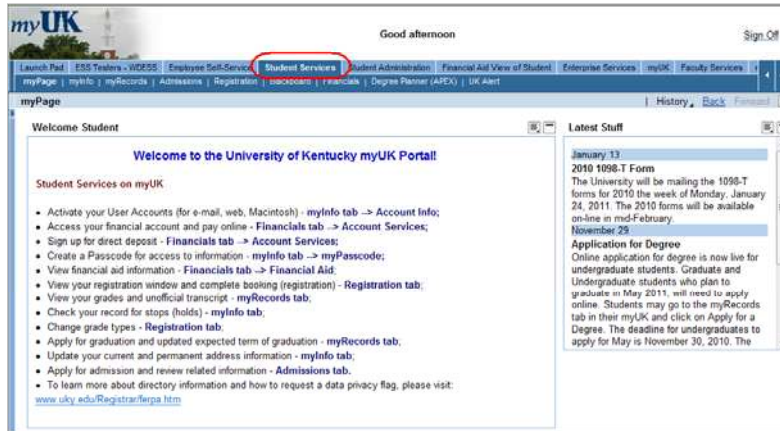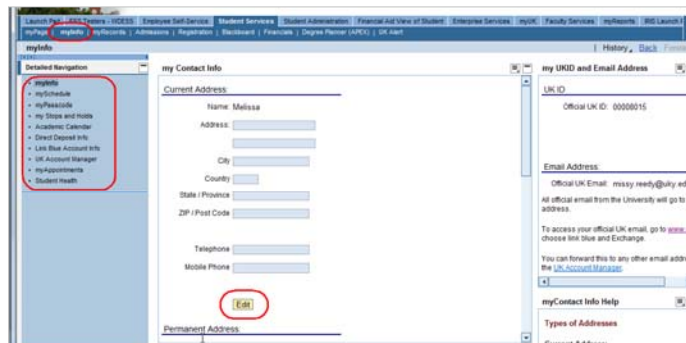
Student Self-Service Tip

- Students can manage some of their own records by logging into *myUK* and using the **Student Services** tab.

Student Self-Service Tip

- On the **myInfo** tab, the student can:
  - Change addresses,
  - View/print a schedule of classes, and
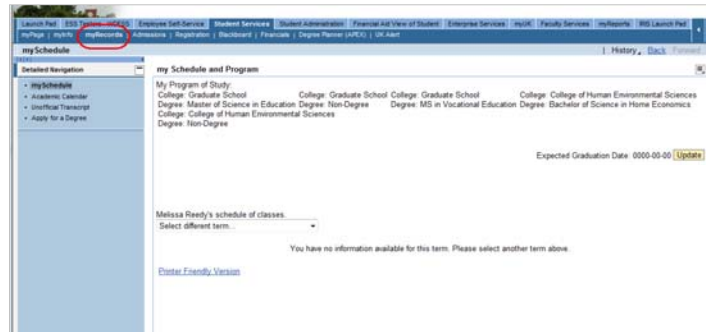 - View stops and holds.

Student Self-Service Tip

- On the **myRecords** tab, the student can:
    - View/print a schedule of classes,
    - View the Academic Calendar,
    - View/print an Unofficial Transcript, and
    - Update the Expected Graduation Date.

Student Self-Service Tip

- On the **Admissions** tab, the student can:
    - Access the Graduate Admissions Form,
    - Access the Undergraduate Admissions Form,
    - Access the Academic Calendar, and
    - Access the UK Course Catalog.

Unit 1
Assessment

SLCM_AD_310 Unit 1
Question 1 of 4

Everything regarding student records can be done in the *myUK* portal.

○ True

○ False
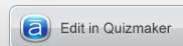
PROPERTIES

On passing, 'Finish' button:	**Goes to Next Slide**
On failing, 'Finish' button:	**Goes to Previous Slide**
Allow user to leave quiz:	**After user has completed quiz**
User may view slides after quiz:	**At any time**
User may attempt quiz:	**Unlimited times**

Properties...

Edit in Quizmaker

Summary

- myUK Student Administration Portal
  - Class Rolls
  - Unofficial Transcript
  - Student Self-Service Tips

Unit 2

PIQST00
Student File and
Master Data

Unit 2– PIQST00 Student File and Master Data

- Accessing PIQST00

- FERPA Warning

- Navigation Between Student File and Student Master Data

PIQST00

- **SECURITY ACCESS NOTE:** Your access may not include access to the IRIS R/3 SLCM transaction screen PIQST00 or some of the transactions on this screen
    - Most transactions can be accomplished through the portal, therefore access to this screen may not be needed
    - Please check with your ASO, if you feel you need access to this screen

- In production, use one of the following methods to access **PIQST00** which contains both **Student File** and **Student Master Data** records
    - Enter **PIQST00** in the command field and press **Enter**

    - Add **PIQST00** to your favorites (preferred by most users)
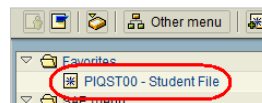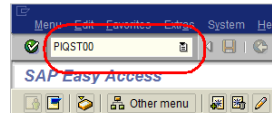
FERPA Warning

- When you open a student's records, a pop up window containing the FERPA warning will appear if the student has placed a privacy flag on the records.

- To move past the warning, click on the **Continue** icon.
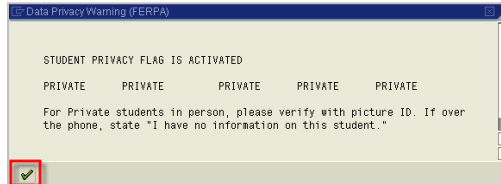
- For more information on FERPA and how it affects student records, refer to your SLCM_200 Student Lifecycle Management Overview course material or check with your Dean's office.

Student File → Student Master Data

- When you initially open the **PIQST00** transaction, the **Student File** screen will display.
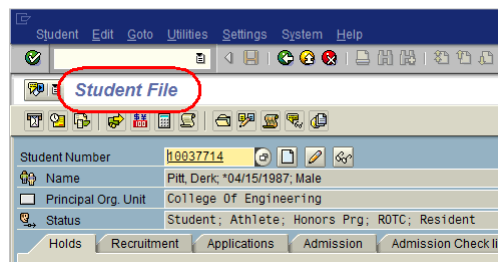
- For basic information regarding these screens, refer to your SLCM_200 Student Lifecycle Management Overview course material.

Student File → Student Master Data

- To go from **Student File** to **Student Master Data**, click on **Display** (the glasses).
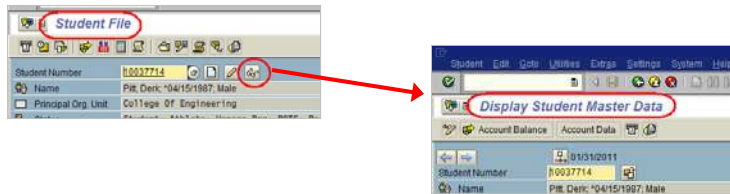
- To go from **Student Master Data** to **Student File**, click on **Back.**

Unit 2
Assessment

Student File

Unit 3– Student File

- Key Date Field
- Holds
- Majors/Minors/Options Tab
- Registration Tab & Program of Study
- Requirement Catalogs
- Program Type Progression
- Status
- Advisor(s)
- Degree Application Process
- Student Notes

Key Date Field

- The **Key Date** is the date as of which IRIS displays, processes, or creates student data
  - The **Key Date** determines what data you see for a student
  - If you use the **current date**, IRIS will show you what is current for the student
  - You can enter a date directly into the **Key Date** field

- Refer to SLCM_200 Student Lifecycle Management Overview course material to review how to change the Key Date

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Holds

- The **Holds** tab is the default tab on the **Student File**.

- It allows you to view, activate, or inactivate holds.

- The **Status** indicator lets you know if the hold is active (green square) or inactive (gray diamond).

Holds

- Students can see information regarding their holds in the **myUK Portal**.

- Use the following steps to display Hold contact information.

  - Click on the **Select** icon to the left of the hold

  - Click the **Display** icon to open the hold record

Holds

- The **Maintain Holds** window will appear.

- To see contact information to remove the hold, click on the **Contact Address** button.

- The **Contact Address** window will appear with contact information for the selected hold.

- Click on the **Continue** to return to the previous screen.
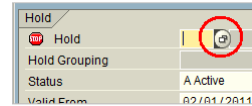
Holds – Create

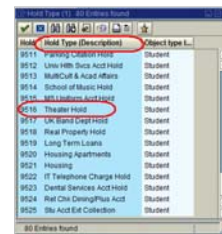- Use the following steps to place a new hold on a student record.

  - Click on the **Create** icon located on the **Holds** tab

  - When the **Maintain Holds** appears, click on **Possible Entries** in the **Hold** field to view the list of eligible hold types
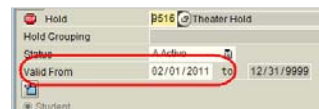
  - Double-click on the appropriate hold
    - **Note:** You can sort the hold type list by clicking on the **Hold Type (description)** column heading
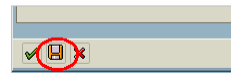
Holds – Create

  - Change the default current date in the **Valid From** field, if needed

  - Click on the **Save** icon

- **Note:** The hold will be displayed with a green square in the **Status** field.

Holds – Deactivate

- Use the **myUK Portal** to deactivate Advisor Holds

  - See the SLCM_WP_310 Advising course at
    http://myhelp.uky.edu/rwd/HTML/SLCM/SLCM_WP_310.html

- Use the following steps to deactivate
  other holds:

  - Click on the **Select** icon to the left of
    the hold you want to deactivate

  - Click on the **Active ←> Inactive** icon

  - Change the defaulted current date in
    the **Valid From** field, if needed

  - Click on the **Save** icon

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Majors/Minors/Options

- Majors, Minors, Options, Specialties, and Sub-specialties may be
  viewed on the **Majors/Minors/Options** tab.

- The **Key Date** is very important on this tab.

  - If you know a major exists, but you cannot see it, it may be due
    to the major having a later date than the one in the **Key Date**
    field, so you may need to delete the **Key Date** and press **Enter**.

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SLCM_AD_310 Student Records

Majors/Minors/Options

- Each Program of Study must have a major.

- There should only be one Priority 1 major, unless certain circumstances occur, such as in the following situations.

  - The majors are effective at different time periods (no overlap).
  - The majors are in different programs of study, even if the time periods overlap.

- To see a history of changes in a student's major **within** a particular program, make sure the program is displaying in the **Program** field.
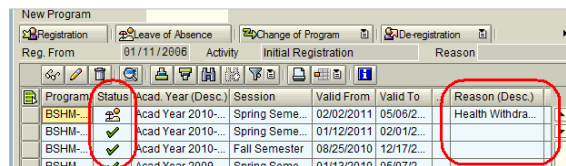 - You may need to change or delete the Key Date.

Registration

- The **Registration** tab will be populated automatically by the admission process, and for each continuous semester in which the student is enrolled
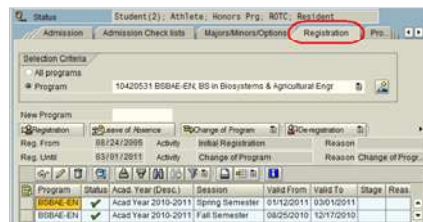
- Registrations may have various statuses

Registration

- Several registration processes are recorded on this tab.

Change of Program

- ◆ Used to move student from one Program of Study to another when the major belongs to a different degree (i.e., change from BA-AS to a BBA-BE)
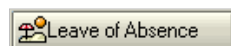- ◆ Used to suspend from College and move to another Program of Study

- ◆ Information regarding changing program and majors is provided in the SLCM_AD_340 Program of Study and Majors course.

Registration
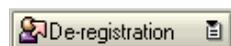
Leave of Absence – Registrar's Office

- ◆ Used when the student withdraws after classes begin (Health, Financial, etc.)

De-Registration – Registrar's Office

- ◆ Used when the student graduates
- ◆ Used when the student doesn't return to UK
- ◆ Used when the student cancels registration before semester begins
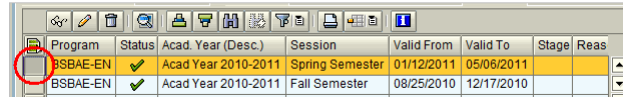- ◆ Used for a University suspension

Registration

- Use the following steps to view the details of a registration.

  - Click on the **Select** icon to the left of the registration row

  - Click on the **Display** icon
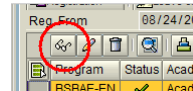
  - View the registration

  - Click on the **Continue** icon to close the **Sessional Registration** window
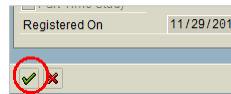
Program of Study

- If the student is currently enrolled, the current Program of Study should display in the **Program** field on the **Registration** tab.
  - Choosing the **Program** radio button displays the details for a specific program.
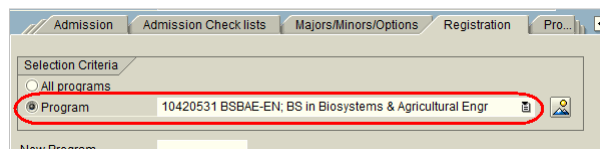
- Choosing the **All Programs** radio button will display all programs in which the student is or has been registered.

Program of Study

- By clicking on the **Program Overview** icon, all program(s) in which the student is still enrolled, as well as any programs in which the student has de-registered will be displayed.

- The **Valid From** and **End Date** for each program is displayed.

Main vs. Additional Program of Study

- When a student has more than one program of study at the same time, only one of the programs shall be the **Main** program.

- All other programs should be designated as **Additional** programs.

- By viewing the details of a session for a program, you can view whether the program is **Main** or **Additional.**

Program of Study

- Use the following steps to view the next Program of Study.
  - Click on the **Drop-down List** icon at the end of the **Program** field
  - Select the next program to populate the **Program** field

  - **Note**: If multiple Academic Sessions are displayed for this program, highlight the row for the current session, then click on the **Display** icon.

Requirement Catalogs

- The **Requirement Catalogs** tab lists **Audit Types**.

- The following **Audit Types** will automatically be set via an admission workflow process:
  - College Requirements
  - Major Requirements
  - USP Requirements
  - Graduation Requirements

Requirement Catalogs

- The information on this tab lets APEX know from which Bulletin to pull the requirements for the student.
  - A student could be admitted to Fall 06, so his USP and Graduation catalog is Fall 06.
  - However, if the student changes majors in Spring 11, the major will have a different catalog of Spring 11 while the USP requirements are still pulled from Fall 06.

Main	Audit ...	Audit T...	Cata...	Catalog	Reqmt Catalog (Ds.)	Version	Cat.Version(Ds)	S
☑	9000	Univer...		0001	University Studies Program	822	2006-10 Fall	0
☐	9000	Univer...		0004	Major 1	800	2011-30 Spring	0
☐	9000	Univer		0002	Graduation Requirements	800	2011-30 Spring	0
☐	9000	Univer...		0003	College Requirements	800	2011-30 Spring	0

- Requirement Catalogs are automatically updated when:
  - A student changes programs and/or majors, or when
  - A student adds an additional major or minor.

Program Type Progression

- The **Program Type Progression** tab contains
  - Academic Honors (Dean's List, etc.)
  - Academic Standing (Probation, Suspension, etc.)
 - Progression Classification (Freshman, Sophomore, etc.)

Progression Results

- Dates are very important when interpreting progression results.
  - **Key Date** – progression results are displayed as of the date displayed in the Key Date field; changing the key date will cause the progression values that are current on the key date selected to be displayed in the progression results area
  - **Valid From** – displays the date the progression results become valid
  - **Valid To** – displays the date through which the results are valid; the most recent progression results will show the date 12/31/9999
  - **Check From Date** – displays the date from which the academic work was checked
  - **Check To Date** – defines the date up to which academic work was checked

Progression Results

- Use the following steps to be more specific in what you view for Progression Results.
  - Choose the appropriate program type by clicking on the drop-down list icon in the **Program Type** field
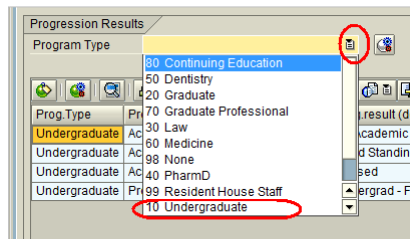
- The student's progression results will display as specified.

Status

- Statuses will be created in an active status.

- Date created will default to current date (Note – you may manually change to desired date) and end date of 12/31/9999.

- **NOTE!** If a student changes a status (for example, is no longer an athlete), the status must be ended.
  - The end date must be changed from 12/31/9999 to the appropriate end date.
 - If this is not changed, the status will always remain on the student record.

Status

- In the **Status** column,
  - The green square indicates an active status, and
  - The gray diamond indicates an inactive status.

Status – Create

- Use the following steps to create a status.
    - Click on the **Create** icon

    - Enter the **Status** code or use the **Possible Entries** to search for the appropriate code

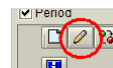   - Verify the **Valid From** and **To** dates

    - Click on **Save**
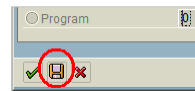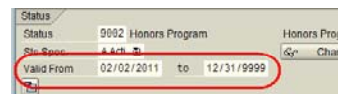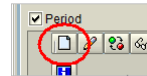
Status – Change
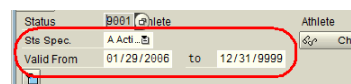
- Use the following steps to view a specific status.
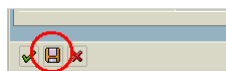   - Click on the **Select** icon to the left of the appropriate line

    - Click on the **Change** icon located on the **Status** tab

    - Change the **Status Specifications** (Active/Inactivate) or the validity dates

    - Click on **Save**

Advisors

- The **Advisor** tab allows one or more advisors to be assigned to a student.

- Use the following steps to add an Advisor.
    - Click on **Create**

Advisors - Create

- Click on the drop-down list icon in the **Advisor Type** field and select **Central Person**

- In the **Advisor ID** field, enter the advisor's ID number or search for it by clicking on the **Possible Entries** icon in the field

- Click on the drop-down list icon in the **Advisor Function** field, select **Academic-Main** for the student's primary advisor or **Academic-Additional** for other people who have advisor responsibilities for the student, such as the department's administrative staff

Advisors – Create

- Click on the **Possible Entries** icon in the **Advising Context** field, select the appropriate program type, such as Undergraduate, Graduate, etc.

- Click on the **Save** icon

- The advisor's information will be displayed.

Advisors – Create

- Use this process to change a student's advisor.

- Instructions include deleting the former advisor!

- **Note**: Please check with your Dean's Office to confirm that you should delete the former advisor.

  - Select the advisor you want to delete
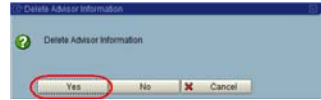
  - Click on **Delete**

  - Click on **Save**

Advisors – Create

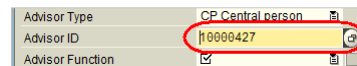- Click **Yes** when the **Delete Advisor Information** box appears

- To add the new advisor, click **Create**

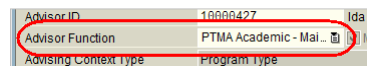- In **Advisor Type**, select **Central Person**

- Enter the **Advisor ID** or use the **Possible Entries** icon to search
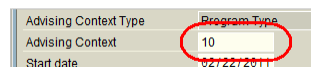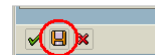
Advisors – Create

- In **Advisor Function**, click the drop-down list, and select **Additional** or **Main** as appropriate

- In **Advising Context**, click the **Possible Entries** icon to select the appropriate program type

- Click **Save**

- **Note:** The update advisor information will be displayed.

SLCM_AD_310 Student Records   36

Advisors – Delete

- Use the following steps to delete a student's advisor.
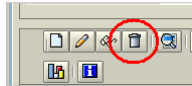
- **Note**: Please check with your Dean's Office to confirm that you should delete the advisor.

  - ◆ Select the advisor you want to delete
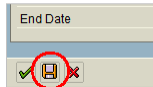
  - ◆ Click on **Delete**

  - ◆ Click on **Save**

Advisors – Delete

- ◆ Click **Yes** when the **Delete Advisor Information** box appears

- ◆ **Note**: The advisor information is no longer displayed on the **Advisor(s)** tab.

Degree Application Process

- Students apply for a degree through the **myUK Portal**

- A confirmation email is sent to the student and the student's degree application is sent to APEX

- APEX audit will return a result

- Colleges will have access to execute a report which includes students who have applied and the APEX result

- Colleges review list and remove students not eligible for degree

- APEX audits are executed for the final time

- Confer Qualification process posts the degree

Degree Application Process

- Use the following steps to view the details of a degree application.

   ◆ Go to the **Application for Degree** tab and double-click on the **Select** icon to the left of the appropriate application

   ◆ Click on the **Display** icon
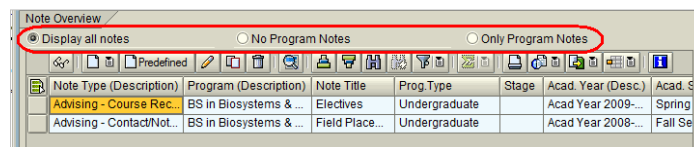
   ◆ Click on **Continue** to close

Student Notes

- Notes, such as Advising notes, can be added to the student's records.

- Notes can be placed on a particular Program of Study or on the student's main records.

- Changes, additions, or deletions may be made to the notes.

- Use the following steps to display notes.
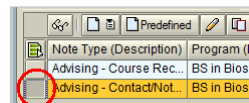
  - Click on the **Notes Overview** icon

Student Notes – Display

- When the **Note Overview** screen displays, three options are available
  - Display All Notes
  - No Program Notes
  - Only Program Notes

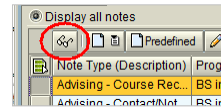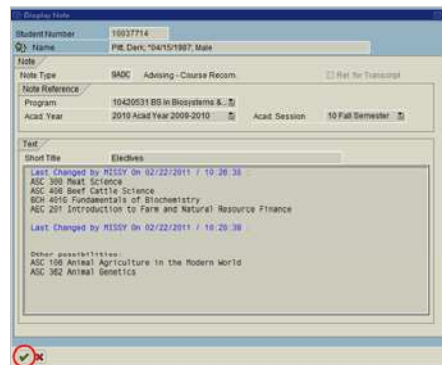- To display a note, click on **Select**

Student Notes

- Click on the **Display** icon

- The date for the original note will be listed at the top of the note

- Any additional changes will be added below the previous note

- Click on the **Continue** icon to close

Student Notes - Create

- Use the following steps to create a note.
  - Pull up the student's records and click on the **Notes Overview** icon

  - On the **Note Overview** screen, click on the drop down list and select the type of note you want to create and where you want place it

  - Select the appropriate **Academic Year**
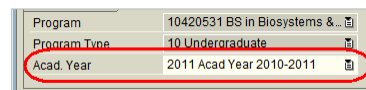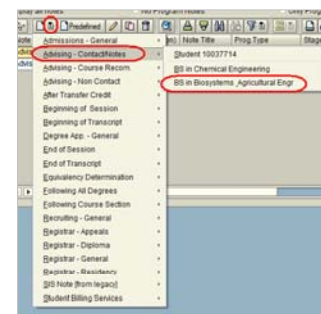
Student Notes

- Select the appropriate **Academic Session**

- In **Short Title**, enter a short title for the note
  - **Note:** The title should provide a short description of the note's content.
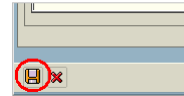
- In the **Text** field, type your note

- Click on the **Save** icon

Unit 3

Assessment

SLCM_AD_310 Unit 3

Question 1 of 4 ▼

The following **Audit Types** will automatically be set on the **Requirements Catalogs** tab:

○ College, Major, Minor, and USP

○ Major, Minor, USP, and Graduation

○ College, Major, USP, and Graduation

PROPERTIES

On passing, 'Finish' button:	**Goes to Next Slide**
On failing, 'Finish' button:	**Goes to Previous Slide**
Allow user to leave quiz:	**After user has completed quiz**
User may view slides after quiz:	**At any time**
User may attempt quiz:	**Unlimited times**

⚙ Properties...

ⓐ Edit in Quizmaker

SLCM_AD_310 Student Records

83 of 106

Summary

IRIS — Integrated Resource Information System

- Key Date Field
- Holds
- Majors/Minors/Options Tab
- Registration Tab & Program of Study
- Requirement Catalogs
- Program Type Progression
- Status
- Advisor(s)
- Degree Application Process
- Student Notes

UK UNIVERSITY OF KENTUCKY

SLCM_AD_310 Student Records

84 of 106

Student Master Data

Unit 4– Student Master Data

- Addresses
  - Standard Address
  - Address Overview
- Related Persons

Standard Address

- The **Standard Address** tab is used to view or edit a student's...

  - Standard address
  - Telephone number

Address Overview

- The Address Overview tab is where you will manage or edit the following categories of addresses:
  - Standard
  - Current
  - International
  - Permanent

- **Note**: This tab also allows you to designate a current address, a permanent address, and an international address.
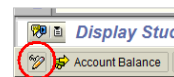
Address Overview

- **Address Overview** lists the various addresses for the students and the validity dates for the addresses.

- **Address Usages** lists how the addresses are categorized, such as permanent, standard, etc.

Address – Create

- To add a new address, you want to be in **Maintain** mode which makes the fields white and editable.

- Use the following steps to enter **Maintain** mode and create an address.

  - Click on the **Display <-> Change** icon

  - On the **Address Overview** tab, click **Create**

  - Enter the **Street**, **City/State/ZIP Code**, and **Country** into the appropriate fields
    - **Country** is a required field and must be completed

Address – Create

- Enter the **Telephone** number including area code, if provided

- Click on **Continue**

- **Valid From** and **Valid To** dates entered automatically as of the date the address is entered into the system

Address – Move

- Use the following steps to record an address move.

  - First enter the new address into the system

  - Next, click on the **Select** button to the left of the "old" address and click on **Move**

  - Enter the moving date in the **Date of Move** field

Address - Move

- To choose the new address, click **Select** to the left of it and click **Choose**

- When the new address displays in the **Move Target Address** field, click **Continue**

Address - Move

- The date changes display in the **Address Overview** section

- Click on **Save**

- To return to **Display** mode, click on the **Change/Display** toggle

Related Persons

- The **Related Persons** tab contains emergency person contact information provided by the student, as well as other related person contact information.

  - **Note**: The undergraduate application asks for an Emergency Contact person, the relationship to the student, telephone number, and email address.

Related Persons – Create

- Use the following steps to add a new related person.

  - Make sure you are in **Maintain** mode

  - Click on **Create With New Related Person**

  - Choose the relationship

Related Persons – Create

- Enter the Contact Information:
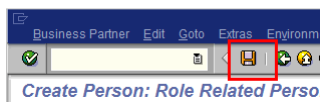 - **First Name**
  - **Last Name**
  - **Address**
  - **Country**
  - **Phone Number**

- Use the scroll bar on the right side of the screen to view all the fields
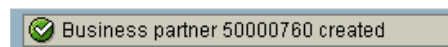

Related Persons – Create

- When the data has been entered, click on **Save**

- A system message will display

- Click on the **Back** icon

- You will see the new entry on the **Related Persons** tab

Unit 4
Assessment

SLCM_AD_310 Unit 4

Question 1 of 2 ▾

To view or edit a student's standard address, use the **Standard Address** tab.

○ True

○ False

PROPERTIES

On passing, 'Finish' button:	**Goes to Next Slide**
On failing, 'Finish' button:	**Goes to Previous Slide**
Allow user to leave quiz:	**After user has completed quiz**
User may view slides after quiz:	**At any time**
User may attempt quiz:	**Unlimited times**

Properties...

Edit in Quizmaker

Summary

- Addresses
  - Standard Address
  - Address Overview
- Related Persons

Reminders

- **SECURITY ACCESS NOTE:** Your access may not include access to the IRIS R/3 SLCM transaction screen PIQST00 or some of the transactions on this screen.

  - Most transactions can be accomplished through the portal, therefore access to this screen may not be needed.

  - Please check with your ASO, if you feel you need access to this screen.

Help Websites

- myHelp website:
  - http://myHelp.uky.edu/rwd/HTML/index.html
  - Contains Quick Reference Cards (QRCs), updated course manuals, and other job aids

- IRIS website
  - http://www.uky.edu/IRIS/
  - Contains Information Directory, Forms, and other references

Course Summary

- Understand the difference between Student File and Student Master Data
- Create/activate/inactivate holds
- View progression results
- Create/change student addresses
- Create/change advisor
- Create related person
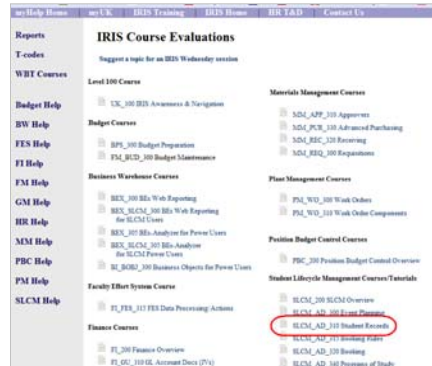- View student records via myUK Portal

Course Evaluation

- You can provide IRIS Training with feedback on this course by completing the SLCM_AD_310 Student Records course evaluation.

- The evaluation is located at:
  http://myhelp.uky.edu/rwd/HTML/SLCM/SLCM_AD_310_Evaluation.html

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Course Completion Instructions

- To complete the course, click **Attachments** (upper right corner)

- Click **QRC Course Completion** and print the QRC
  - **Note:** The QRC will open in another window.

- Click **OK** to close the **Attachments** window

- Follow the steps in the QRC to complete the course