

Participants - Daily Operations

Participants Overview

After installing and setting up your Red Canyon Systems program, you will perform daily work using the Participants function to do the following activities:

- Add new participants
- Change participant data
- Inactivate participants
- Delete participants
- Add, change, delete participant course enrollments (includes Add/Drop functionality)
- Add, change, delete categories in participant records (category codes must be added in Resources first)
- Add, change, delete memberships in participant records (membership codes must be added in Resources first)
- Add, change, and delete participant visit records
- Add, change, and delete participant visit activity records

Log In customers: If you have selected "Track Activities – Log In or Log Out" in Log In Set Up and then added Log In activities in the Facility/Activity form, you can add and maintain activities in participant records.

FICIS customers: If you have checked "Enter Workout Activities" in the Fitness Center/Profile, you can maintain aerobic and workout program activities for visits that you enter manually.

CenterFit customers: If you select "Track Activities – Log In or Log Out" in Log In Set Up, you can track visit activity. If you check "Enter Workout Activities" in the Fitness Center/Profile, you can manually enter aerobic and workout program activities for visits.

FICIS and CenterFit customers: enter and maintain fitness test scores and testing dates, risks, and goals

Note: If you have prepared the data for downloading from a registration system, you can import participant records that identify general information (name, address, phone, etc.), course records, and enrollment records. You should import this information into your Red Canyon Systems program whenever you begin a new term. If you do not import records from your registration system, you will need to enter the participant, course and enrollment data manually. After you initially enter participant records, you do not need to delete or add them again them for each term. If a participant is not enrolled in a current course, the participant's record receives an "inactive" status upon importing current term enrollment data. The record still exists; it just does not show up until you enroll the person in an "open" term.

Add New Participants

If you do not download participant data from a registration system, you must enter participant data on Red Canyon Systems forms. Before a participant can log in for a course, the general information about the participant must be in the computer. This data consists of ID, name, address, date of enrollment, sex, birth date, and courses enrolled in. If you download participant data from a registration system, as defined in the section - Importing Data, the general participant and enrollment data will be provided for you.

Follow these steps to add a new participant to your Red Canyon Systems program.

1. On the **Participants** menu, select **General Information**.

The Participants General Information form appears with tabs for each function available.

Term	Course Name	Section	Awarded Time	Awarded Visits	Grade	Status
Fall 2001	ESL 100	001	3:32	6	C	O
Fall 2001	Eng 101	001	0:00		D	O
Fall 2001	Math 200	001	1:08	1		O

2. Click **Add**.
The screen will be cleared of existing records and the cursor will be blinking in the **ID** field.
3. Enter data in the required fields and any optional fields that your site uses, according to the table that follows.

Participant General Information Required Fields

Participant General Information Required Fields:	
ID	Enter the participant's primary identification number. You must use the format that was selected for the Primary ID # on the ID Format screen in Set Up.
Log In Card ID#	<p>If you have participants scan ID cards to enter ID numbers and the Card ID for each participant is different than the Participant Primary ID, enter the participant's Card ID here. This field appears on the Participant/General Information screen if you have selected the option, <i>Unique Card ID#</i>.</p> <p>Missing Cards and Newly Issued Cards: If a participant misplaces an ID card and needs to enter their ID via the keyboard, the participant must still enter the card ID#, not the Primary ID. If the participant does not know the card ID, you must look it up on the CenterFit/Log In Administrator computer by locating participant by Primary ID or Name.</p> <p>If a participant loses a card and a new one is issued, it would most likely have a new ID number. In this case, you use the Participant/General Information screen and change the Log In Card ID# to match the new card number.</p>
Last Name – First Name – Middle Initial:	Participant name. The data appears in reports identically as you capitalize it in these fields.
Enroll Date	The date the participant enrolled is entered in MM/DD/YY format. If you don't enter a value for date, the system date is entered as the enrolled date.
Status	Participant Log In Status. When new participants are added, they are automatically assigned a status of "A" for Active. This means they can log in. If, for some reason you want to prevent a participant from logging in or want to know when a specific participant attempts to log in, change the participant's Status to "I" to represent Inactive. When the participant tries to log in, a beep sounds (if you have identified an error sound in the Windows standard sound options) and a Log In error message displays.
Sex	A participant's sex is either "F" for female or "M" for male. Sex and Birth date are required in some reports.
Birth date:	Participant birth date in "MM/DD/YY" format. If you enter a birth date that is invalid, the Message Box displays an error message.
Optional fields:	
Address 1, Address 2	Two lines available for entering the participant's home address. This field is required if you print mailing labels.
City, State, Zip Code	If you have used the Resources function, Zip Codes, you will have a drop-down list of the most-common zip codes with their associated city and state from which you can select. If you do not have a drop-down list, you must type the zip code, city, and state for each participant.
Home Phone	Enter the home phone number, including area code – no formatting characters are needed (dashes, hyphens). The program performs formatting automatically.
Business Phone	Enter the business phone number the same way as the home phone. If there is an extension, enter a space – an X appears. You can then type up to 5 numbers for the extension.
Secondary ID#	Enter an alternate ID that you want to use for the participant. This can be SSN when you are using a different type of ID as the Primary ID but still need to cross-reference the participant with another ID. If this ID is to be formatted differently than the Primary ID, you must select its format on the Set Up screen before you enter the first participant. You cannot change ID formats after adding the first participant or entering an ID in a designated format.
Participant Categories:	If you have used the Resources function, Categories, you will have up to four drop-down lists of available categories from which you can select. Categories provide a way to describe segments of participants for better reporting and additional tracking. A complete description of the category function is provided in the Resources chapter. Do not enter categories independently in these fields. Set them up first in Resources.
Log In Comment (Log In Users)	You can type a comment for the participant that can be seen when the participant logs in.

Change Participant Data

If you need to change participant data (general, misc, or visit), you can do so in the Participants function by locating the Participant by name or ID.

Follow these steps to change participant data.

1. Click on the **Participant Name** or **ID** locator on the left portion of the screen.
2. Type a letter to locate a matching alphabetical portion of the list or scroll down through the list using the down arrow on the right side.
You can locate by the participant's ID also, using the same method as above.
The data for the selected participant appears on the right side of the screen.
3. Change data, using the Tab key or mouse to move from field to field.
4. When you complete the changes, click **Save**.
A confirmation message appears. Click the appropriate response button (**OK**).

Inactivate/Activate Participants

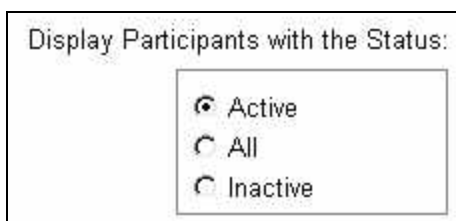
You can set an individual participant's record status to "Inactive" and back to "Active" using this function. There are several reasons for doing this:

- To keep participants from showing in the Locator field when they are not part of the current term.
- To prevent a participant from being able to "log in" for one reason or another. Upon logging in, the participant with an inactive status will see this type of message: *You cannot log in. Your status is inactive. Please see an instructor.* The participant cannot log in until the "inactive" status is changed back to "active."

Note: To inactivate a large group of participants all at the same time, you must close your current program (Log In Administrator) and use the **File Utilities Participant Inactivate/Activate** function. **Instructions are provided in the *File Utilities* chapter.**

Follow these steps to inactivate/activate participants individually.

1. On the bottom left side of the *Participants General Information* form, set the *Display Participants with the Status* to "All" by clicking the radio button. This action provides a locator list of participants with both Active and Inactive status.



The image shows a rectangular box with a thin border. At the top left of the box, the text "Display Participants with the Status:" is displayed. Below this text, there are three radio button options arranged vertically: "Active" (with a filled radio button), "All" (with an empty radio button), and "Inactive" (with an empty radio button).

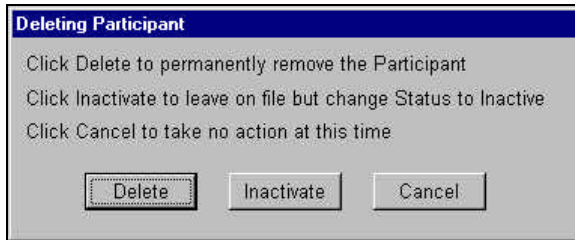
2. Locate the participant for whom you need to change the status.
3. In the **Participant General Information** form, press Tab to go to the *Status* field.
4. Click on the correct status – **Active** or **Inactive**.
5. Click **Save**.

Delete Participants

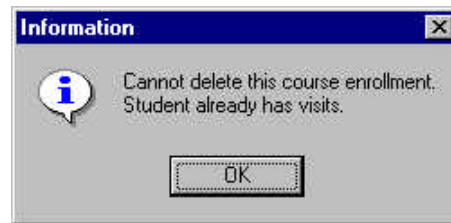
Deleting participants should be performed when a participant's data is no longer needed in the system, including visits and course enrollments. Follow these steps to delete a participant.

1. Use the **Participant Name** or **ID Locator** on the left side of the form to select a participant.
2. Click **Delete** on the left portion of the *Participants* form.

The following *Deleting Participant* window appears with response buttons.



3. In the *Deleting Participant* window, click **Delete** to remove the participant and all related data from the system. If the following types of information messages appear, you must first delete the participant's course enrollments and visits records associated with those enrollments.



Deleting Participant Visits

- Click on the **Participant Visits** tab.
- Click on a visit that you want to delete.
- Click **Delete**.
- The *Confirm* window appears with responses for your decision.
- Select the appropriate response – **Yes**, **No**, or **Cancel**.
- If you select Yes, the total for visits for this participant will be decreased and if there was an activity, it will be deleted.

Deleting Participant Course Enrollments

- Select the participant by using the *Participant Name* or *ID* locator on the left side of the form.
- In the list on the right side, click on the course.
- Click **Delete**.
- The *Course Enrollment* window displays with prompts for additional decisions.
- Click **Delete**. If the participant has any visits for the course, you must delete the visits first (see the steps above, *Deleting Participant Visits*.)

4. Click **Save**.

Misc Participant Data

If you need to store emergency contact information, participant notes, and membership status (membership type, starting date, ending date) enter it on the *Misc* form.

Emergency Contact	Enter the name of person to contact in an emergency.
Relationship	Select a relationship from the drop-down list.
Phone	Enter the phone number – no formatting necessary – of the emergency contact.
Membership Type	Select a membership type from the drop-down list. This list is created in the Resources form – Membership types.
Starts On	Enter the date (mmddyy - no formatting necessary) on which the membership begins. A calendar appears for your convenience. Click on the appropriate month and date.
Expires On	This date is calculated automatically based on the membership code that you have selected. If you want this date to display on the Log In screen and also use it to keep participants from logging in, check the Log In Set Up option, Display Expiration Date .
Participant Notes	Type notes that would be used in an emergency or special notes that you need to keep about the participant.

Course Enrollments for Participants

If you do not download (import) course, enrollment, and participant files for each term, you must enter course enrollments manually for each participant. If you do not enroll participants in courses, you will not be able to separate the report data by course.


Adding a Course Enrollment for a Participant

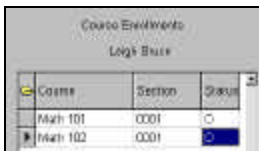
Follow these steps to add a course enrollment for a participant:

1. Select the participant by using the **Participant Name** or **ID Locator** on the left side of the form.
2. Select the correct term in the **Term Locator**.
3. Click on a course listed under the *Term*.
4. Click **Add**. The course will be added on the right side of the form – *Course Enrollments*.

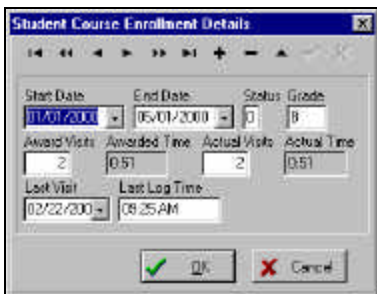
Viewing Course Enrollment Detail for a Participant

Follow these steps to view the detail in a course enrollment record for a participant:

1. Select the participant by using the **Participant Name** or **ID Locator** on the left side of the form.
2. Select the correct term in the **Term Locator** on the left side of the form.
3. In the **Course Enrollments** section (on the right side of the form), click on the course.
4. Click the folder icon  next to the *Course* column.



5. The *Student Course Enrollment* window opens showing the course and enrollment, plus grade information (if calculated). To change a grade, see *Changing a Participant's Course Grade*.



6. Click **OK** to close the window.


Changing a Participant's Course Grade

Follow the steps for Viewing Course Enrollment Detail for a Participant.

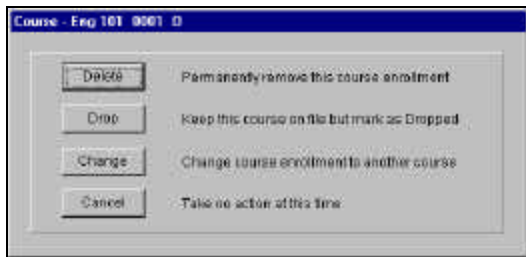
7. On the *Selected Course Enrollment Details* window, click in the **Grade** field and type over the grade.
8. Click **OK** to save the change and close the window.
Click **Cancel** to undo the change and to leave the information as it was originally.

Deleting a Participant's Course Enrollment

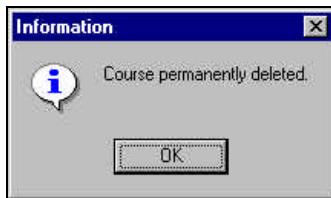
If you need to delete a course enrollment for a participant, use the Delete function and follow these steps. This action permanently removes the course enrollment record from the participant's record. If the participant record has visits associated with the course, you must delete the visits first before you can delete the enrollment.

 **Note:** If you want to drop the participant from one course and add to another course, follow the steps for *Changing a Participant's Course Enrollment*.

1. Select the participant by using the **Participant Name** or **ID Locator** on the left side of the form.
2. In the *Course Enrollments* section (on the right side of the form) click on the course enrollment that you want to delete.
3. Click **Delete** on the left side of the form.
The *Course* window appears with prompts for additional decisions.



4. In the *Course* window, click **Delete** to remove the participant's course enrollment record from the system.
A message appears to confirm that you have deleted the course enrollment.



5. On the *Information* window, click **OK**.

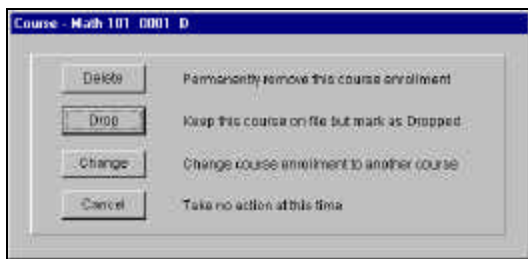
Dropping a Participant's Course Enrollment

If you need to drop a course enrollment for a participant without adding another course, use the Delete function and follow these steps. This action removes the course enrollment record from the participant's record but still includes the participant in the course roster with a *Dropped* status.

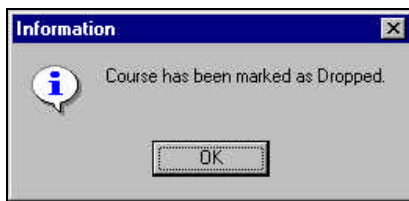
 **Note:** If you want to change the participant's enrollment by dropping from one course and adding to another, follow the steps for *Changing a Participant's Course Enrollment*.

1. Select the participant by using the **Participant Name** or **ID Locator** on the left side of the form.
2. In the *Course Enrollments* section (on the right side of the form), click on the course enrollment that you want to drop.
3. Click **Delete** on the left side of the form.

The *Course* window appears with prompts for additional decisions.



4. On the *Course* window, click **Drop** to assign a status of "dropped" to the participant record. A message confirms appears on the *Information* window to confirm that you have dropped the course enrollment.

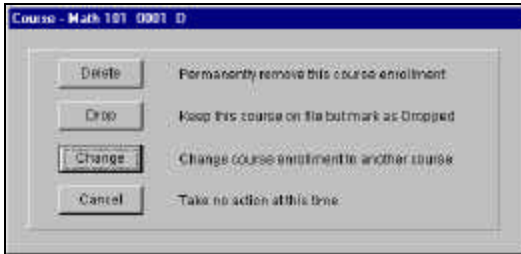


5. On the *Information* window, click **OK**.

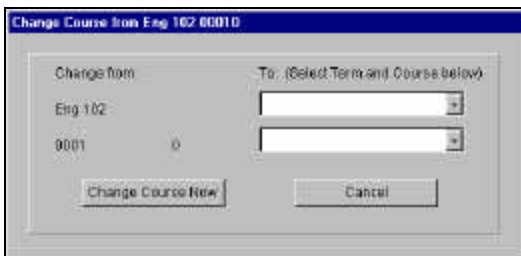
Changing a Participant's Course Enrollment

If you need to change a course enrollment for a participant, use the **Delete** function on the **Enrollment** form and then the **Change** button on the *Course* window. Follow these steps.

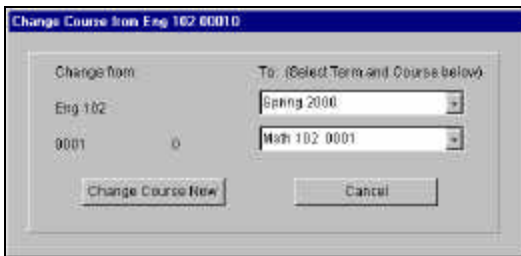
1. Select the participant by using the **Participant Name** or **ID Locator** on the left side of the form.
2. In the *Course Enrollments* section (on the right side of the form), click on the course enrollment that you want to change.
3. Click **Delete** on the left side of the form.
The *Course* window opens with options for the course enrollment, **as shown**.
4. On the *Course* window, click **Change** to open the *Change Course* window, **as shown**.



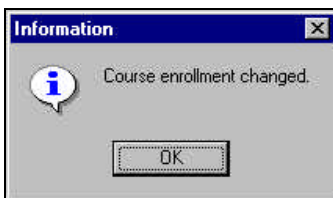
5. On the *Change Course* window, in the **Change To Course** and **Section** fields, click in the first field to open the drop-down list of courses. Select a course and then in the field below it, click and select the section number.



The screen should look like this:



6. Click **Change Course Now**.



7. When you see the "Course enrollment changed" message, click **OK**.

Participant Visits

If you are a Log In or CenterFit customer, use the Visits form to maintain participant visits and activities (optional – if selected on the Log In Set Up) for those visits. You can delete, change, and add visits and visit activities.

- If you have selected to track courses as part of the Log In Set Up, the top portion of the form shows the total visit information for each course in which the participant is enrolled.
- If you have also selected to track Log In Activities (add them first in Facility/Activities), the bottom portion of this form shows the activities logged for each visit.

Visit Status Codes

At the end of each visit record, there is a status code listed.

M	Participant did not log out – the time assigned in Log In Set Up for a Missing Log Out was assigned for this visit. This status is assigned when a participant who does not log out in a lab, logs in later from a different lab (after the max visit time has passed) or when the Missing Log Out Utility is run.
L	Length of visit was longer than the amount of time assigned in Log In Set Up for a maximum visit.
S	Visit was not long enough to satisfy the amount of time assigned in Log In Set Up for a minimum visit.
N	Normal visit. – participant logged in and logged out in a lab.
A	Visit that has been adjusted by running file utilities – adjust visits.

Participants - Visits

Participant Name Locator: Connors, Debbie

Participant ID Locator: 997-99-7987

Print Visits [Add] [Over] [Delete] [Cancel] [Refresh] [Help]

Display Participants with the Status:

- Active
- All
- Inactive

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Term	Course Name	Section	Actual Visits	Actual Time	Award Visits	Awarded Time	Last Visit
Fall 2002	Eng 101	001	0	0:00	0	0:00	
Fall 2002	Math 080	001	0	0:00	0	0:00	
Fall 2002	HPR 101	010	6	7:10	6	7:10	09/10/2002

Visit Activities for 09/04/2002 - 07:00 AM

[Add Activity] [Save Activity] [Delete Activity] [Cancel Activity]

Activity: Orientation

Actual Visits/Awarded Visits Description

Log In visits are referred to as either Actual or Awarded. Most reports list the data for both types of visits. The differences between these two types of visits are:

Actual Visit	Each time someone logs in, a record is created for that visit. Every visit is an Actual Visit.
Actual Time	The amount of time allocated to each visit. It equals the time elapsed between Log In and Log Out for each Visit.
Awarded Visit	An Awarded Visit is a visit that complies with all the Visit Rules. That is, the length of the visit was over the minimum time required, and within the maximum accepted visits per day. If the visit was below the minimum time required, or over the maximum visits accepted per day, it is counted as an actual visit, but not as an awarded one.
Awarded Time	The amount of time given to an Awarded Visit. If the visit was greater than or equal to the minimum time required and less than or equal to the maximum time required, Awarded Time equals Actual Time. If the visit was less than the minimum required, Awarded Time is 0. If the visit was more than the maximum time allowed, then Awarded Time equals the maximum time allowed.

Each visit record stores the following information for that visit:

Actual Visit Count - How many actual visits this visit is worth - usually 1.

Actual Visit Time - How much time this visit actually lasted.

Awarded Visit Count - How many awarded visits this visit is worth - normally 0 or 1.

Awarded Visit Time - Amount of time awarded to this visit - 0 to maximum time per visit.

The only time Actual or Awarded Visit Count is greater than 1 is when the visit record was created by File Utilities as a Visit Total Adjustment. In that case, Visit Count can be any value. The same is true of Actual and Awarded Visit Time.

If someone logs in and fails to log out, the computer automatically assigns visit lengths equal to the value that was assigned to Missing Log Out time in Log In Set Up.

Visit Examples

The examples are based on the following Log In Visit Rules:

Minimum Visit Time: 20 minutes

Maximum Visit Time: 120 minutes

Maximum Visits per Day: 2 visits

Missing Log Out Time: 10 minutes

Participant	Log In at	Log Out at	Actual Visit Count	Actual Visit Time	Awarded Visit Count	Awarded Visit Time	Explanation
Bob	10:30AM	11:00AM	1	0:30	1	0:30	Accepted
Sue	10:30AM	10:45AM	1	0:15	0	0:00	Too short
Bob	01:00PM	03:30PM	1	2:30	1	2:00	Too long
Sue	01:00PM		1	0:10	1	0:10	Missing log out
Bob	07:00PM	08:00PM	1	1:00	0	0:00	Too many visits
Note on Missing Log Outs: If Missing Log Out Time is set to 0 (zero), Awarded Visit Count and Awarded Visit Time are 0 (zero) for any visits with Missing Log Outs.							
Bob	10:30AM		1	0:00	0	0:00	Missing log out

Adding a Visit

1. Click **Add**.

The *Adding a Visit* window appears with fields for entering dates and times.

Name	Section	Actual Visits	Actual Time	Award Visits	Awarded Time	Last Visit
001		0	0:00	0	0:00	
001		0	0:00	0	0:00	
010		6	7:10	6	7:10	08/10/2002

Time Out	Actual Visits	Actual Time	Award Visits	Awarded Time	Status
		0:00		0:00	
08:15 AM	1	1:15	1	1:15	N
09:00 AM	1	1:00	1	1:00	N
08:45 AM	1	1:15	1	1:15	N

2. Enter the **Date In** (date of the visit) – *mmddyy* – do not enter dashes, slashes or hyphens.
3. Press Tab to move to the next field.
4. Enter the **Time In** - start time of the visit – using two digits for the hours (02, 03, etc. for single-digit hours) and two digits for the minutes. Follow the entry immediately with a P (for PM) or an A (for AM). For example: to enter 3:00 in the afternoon, you should type **0300p** and press Tab to move to the next field. The time will be formatted by the system.
5. Enter the **Date Out** (date of the visit) – *mmddyy* – do not enter dashes, slashes or hyphens.
6. Press Tab to move to the next field.
7. Enter the **Time Out** – stop time of the visit – using the same rules as the "time in" in this field.
8. If the course you select is offered in more than one lab, you will need to choose the correct lab from the drop-down list in **Lab Locator**.
9. If you use more than one workstation for logging in, you will need to choose the correct workstation from the drop-down list in **Workstation Locator**.

Deleting a Visit

1. Click on a visit that you want to delete.
2. Click **Delete**.
3. In the *Confirm* window, select the appropriate response – **Yes**, **No**, or **Cancel**.
If you select **Yes**, the total visits for this participant will be decreased. If there was an activity, it will be deleted.

Visit Activities

Through the participant's visit record, you can also track aerobic, workout, and Log In visit activities. Tracking of Log In visit activities is provided as an option through Log In Set Up, where you indicate when the participant will select the Log In activity (at Log In or Log Out). Upon turning on this option in Log In Set Up, you must then specify the activities you want to track using Facility/Activities.

If you are a fitness center customer (CenterFit or FICIS) and you want to track aerobic and workout activities for visits, you must specify that option in Fitness Center/Profile by checking the option, *Enter Workout Activities*.

Adding a Visit Activity

1. Click on a visit for which you want to add an activity.
The visit date and time in appears in the bottom portion of the form.
2. Click **Add Activity** in the bottom portion.
3. Click the type of Activity you want to add: **Log In, Aerobic, Workout**.
Click in the open field in the *Activities* grid.
4. Click the down arrow at the end of the field.
A list Activities (predefined in Facility/Activities or those that are defined in the fitness module for aerobic activity and by workout programs) appears.
5. Click on an activity (for workout activity enter the number of circuits, for aerobic activity enter the time in minutes) and click **Save Activity**.

Deleting a Visit Activity

6. Click on a visit for which you want to delete an activity.
The visit date and time in appears in the bottom portion of the form.
7. Click **Delete Activity** in the bottom portion.
8. Click on an activity and click **Save**.

Participant Fitness Tests

After you have set up tests, exercises, and norms in the Fitness Center function, you can enter the scores for fitness tests for each participant. The screen shown below is the fitness test form that results from how you have set up exercises, tests, and your center's profile settings. You can enter as many tests as you want for each participant. The **Individual Comparison Report** allows you to compare against any number of tests and for a range of dates. You must have entered at least two tests to be able to run a comparison report.

Reports that show fitness assessment information are: Fitness Profile, Fitness Profile with Workout Program. If you have defined Workout Programs, you will be able to provide the report with a workout program.

Follow these steps to enter a participant's fitness tests.

1. On the **Participant** form, click the tab named **Fitness Tests**.

Test Item	Score
Resting Pulse	75
Weight (lb)	150
BP - Systolic	130
BP - Diastolic	100
Body Fat - Impedance	24
Hip Flex/Sit & Reach	18
Step Test - 1 Count	120

Exercise	Str	Score
Abdominal Crunch		10
Bench Press		100
Leg Press (Seated)		200

2. For a new test: Click **Add**. The cursor goes to the **Current Test Date** field.
3. Enter the date of the test – just enter *mmddyy* – no formatting needed. Press **Tab** to move the cursor to the next field.
4. Enter the ID of the tester (optional). At some sites participants find that each tester tests in a slightly different manner. This information is useful for those participants who request the same tester.
5. Enter the **Next Test Date** (optional) – just enter *mmddyy* – no formatting needed.
6. Click the cursor in the entry fields next to the first test. Enter the testing scores for the item. Continue entering test scores for each test item, entering measurements (such as minutes, miles, height (in inches), and weight (in pounds)).
7. Click **Save**.
8. On the right side of the form, enter the max lift scores for the exercises used in testing.
9. When you are finished entering tests, click **Save**.
10. Display any fitness test: click the mouse in the **Test Dates** field and scrolling to display a test date.
11. When you print the fitness test reports, you can select all tests or a specific test.

If you need assistance with Fitness Testing, review our FAQ documents for this information. They have been provided with your software shipment and can be downloaded from our website. If you need additional copies, please call our support office.

Participant Risks and Goals

If you have set up Risks and Goals for your site in the Set Up function: Fitness Center Set Up, you can enter participant responses to the risk and goal questions. Follow these steps to enter risk and goal question responses.

1. On the Participant form, select **Risks/Goals**.
2. Select the test date in the **Test Date Locator** field. You must have entered a fitness test for the participant before entering risks and goals.

3. Select the appropriate participant by name or ID by using the **Participant Name** or **ID Locator** field on the left side of the form.
You will see a list of the risks (goals) that have been set up for your site.
4. Enter appropriate responses in the fields to the right of each question.
Some responses require a **Y** or **N**. Other responses require a measurement in pounds or inches.
5. When you have completed the responses for the participant, click **Save**.