

**National Child Passenger Certification  
Policies and Procedures**

**Version: August 17, 2010**

**For the most up to date information, please go to <http://cert.safekids.org>.**

This manual contains important information regarding Safe Kids Worldwide policies and procedures for the National Child Passenger Safety Certification Training Program.

Please note that Safe Kids Worldwide constantly reviews its policies and procedures and revises them to clarify information and to address questions and feedback received. While we make every effort to keep this manual up to date, check the Web site, <http://cert.safekids.org> for the most recent version of our policies and procedures. Updates will be noted in the policies and procedures section.

For specific step-by-step instructions for various processes, please view the instructions section of the program Web site.

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# Certification

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## **Certification: Overview** **Certification Course**

The national standardized child passenger safety technician certification course is usually four to five days long and combines classroom instruction, hands-on work with car seats and vehicles, and a community safety seat checkup event, where students demonstrate proper use and installation of child restraints and safety belts and then teach these skills to parents. Successful completion of this course certifies the individual as a CPS technician for two years.

This certification is only valid for practice in the United States and its territories and on non-domestic U.S. military installations. Registration for all certification courses is \$75, excluding any applicable late fees. A detailed fee table is available in Resources -> Fees.

The certification course is available in English. All official written documentation, including correspondence with technician-candidates and certified individuals, and the Web site will continue to be in English. There are Spanish-speaking customer service representatives available to field inquiries and assist individuals in navigating the Web site.

### ***Failure to Qualify for Certification***

You will fail to qualify for certification if one of the following occurs:

1. You do not pass any of the three hands-on skills assessments during the course. You will be notified during the course and may stay in class as an observer only at the discretion of the Lead Instructor.
2. You do not pass the checkup event (communication and/or technical skill).
3. You fail the written component (overall score of 83% or less).

If any of the above occurs, you must repeat the entire course to be certified. No refund will be provided, as all processing and course materials have been delivered. You must register for any subsequent course and pay any associated fees.

Students who must retake the NSCPSTP course should access their online profiles and register for a new course using their existing usernames and passwords. Do not create a duplicate contact record.

### ***Special Needs and Accommodations***

Students with special needs should send a written request to the Lead Instructor, documenting the need and specifying the accommodation requested before the start date of the course.

Accommodations may be made on-site at the discretion of the instructor team. Depending on the nature of the accommodation requested, additional documentation from a qualified professional may be required.

# Certification

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## Certification: Registration

NOTE: In extraordinary circumstances, special exceptions will be addressed by written request up to 60 days of course end date.

All registration must be done online. However, you can pay either online with a credit/debit/check card or manually with a check, purchase order or money order. Charges will appear on the credit/debit/check statement as "Safe Kids Worldwide".

Any course can be either public or controlled. Public courses are open to all individuals, while controlled courses are open only to those approved by the Lead Instructor. Anyone can request a reservation to attend the course. If approved, he or she will be able to complete their registration by paying the course fees.

To pass the course, technician candidates must participate in a community check up event with families and children. If there is any reason you are unable to meet this requirement, legal or otherwise, do not continue with the registration process. You are ineligible to become a certified passenger safety technician. No refunds will be provided.

## Public Certification Course

After logging into Online Services (create a new profile if necessary), choose REGISTER FOR A COURSE from the action items list in your profile.

Search for certification courses in your area and choose REGISTER FOR THIS COURSE on the course details page.

Confirm your registration and contact information. If you need to make changes, please update your profile prior to continuing or click COMPLETE THE REGISTRATION PROCESS.

You will then have the option to either continue, and pay online with a credit/debit/check card, purchase order or e-voucher, or print out a pre-filled registration form and submit it with a check, purchase order or money order. The mailing address, fax number and phone number for submitting registrations can be found on the registration form.

Registrations for public courses are not complete and a seat will not be held until registration and payment is received.

**PLEASE NOTE:** Regular student registration closes **10 calendar days** before the start date of the course. Any paper registrations received after this date will be charged a \$10 late fee. All late fees will be waived for individuals completing the registration and payment process online using a credit/debit/check card.

**PLEASE NOTE:** Registration closes at midnight of the first day of the course. It is NOT possible to register after this date. Failure to do so may prevent the student from being eligible for certification.

**PLEASE NOTE:** If an individual cancels or reschedules his or her registration he or she can not re-register for the same course at a later time.

**PLEASE NOTE:** Registered organizations may register their affiliates for courses. See the Organization Management section for more details.

## Certification

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### Controlled Certification Course

If you already have a profile, log on with your user name and password and choose FIND/REGISTER FOR A COURSE. If you have not yet created a profile, click on the FIND A COURSE button.

Search for certification courses in your area (be sure to check the ALSO SHOW INVITATION ONLY/CONTROLLED COURSES box). Select the course. If you are not already logged in, choose [CLICK HERE TO FIND OUT IF YOU ARE ELIGIBLE TO REGISTER FOR THIS COURSE](#). If you are already in the system and logged in, choose [REQUEST INSTRUCTOR APPROVAL TO REGISTER FOR THIS COURSE](#) on the course details page.

Confirm your registration and contact information. If you need to make changes, please be sure to update your profile. Click [COMPLETE REGISTRATION REQUEST](#).

You will be notified by e-mail that your reservation was either been approved or denied. This will also appear in your profile under the action item [VIEW COURSE REGISTRATION HISTORY](#). If approved, you must submit payment within 10 days of notification or by midnight of the first day of the course, whichever is earlier, to complete the registration process.

From the course registration history page, choose the reservation. You will now have the option to pay online with a credit/debit/check card or print out a pre-filled registration form and submit it with a check, purchase order or money order. The mailing address, fax number and phone number for submitting registrations can be found on the registration form.

Registrations for controlled courses are not complete until registration and payment is received.

**PLEASE NOTE:** Regular student registration closes **10 calendar days** before the start date of the course. Any paper registrations received after this date will be charged a \$10 late fee. All late fees will be waived for individuals completing the registration and payment process online using a credit/debit/check card.

**PLEASE NOTE:** Registration closes at midnight of the first day of the course. It is NOT possible to register after this date. Failure to do so may prevent the student from being eligible for certification.

**PLEASE NOTE:** If an individual cancels or reschedules his or her registration he or she can not re-register for the same course at a later time.

**PLEASE NOTE:** Registered organizations may register their affiliates for courses. See the Organization Management section for more details.

### Group Registrations

Agencies wishing to register a group of students and pay for all of the registrations with a single check or purchase order may register their organization online with Safe Kids. The organization may also register its affiliates for courses and pay online with a credit/debit/check card, purchase order or e-voucher. Please see the Organization Management section for more details

Instructor approval for controlled courses (approved reservation requests) is necessary.

## Certification

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Paper applications for each individual may be printed and submitted with the check or P.O. as group to the address listed on the forms. Be sure to include the names of all registrants and the course ID number(s) on the check or P.O.

**PLEASE NOTE:** Registration confirmation notices are sent directly to each individual student, not to the person who submitted the registrations and payment.

### Deadlines, Late Registrations and Walk-ins

Regular student registration closes **10 calendar days** before the start date of the course. Any paper registrations received after this date will be designated as a late registration.

Late and walk-in registrations (including those completed online) will be accommodated only if there is space available. **All registrations must be submitted by midnight of the first day of the course following normal registration procedures.** Failure to do so may prevent you from being eligible for certification.

All late and walk-in registrations will be charged a \$10 late fee. These late fees will be waived only if you complete the registration and payment process online using a credit/debit/check card, P.O. or e-voucher.

If your agency has not registered with Safe Kids, print out your personalized registration form, add the payment information and give it and a copy of the P.O. to the Lead Instructor or course administrator the **FIRST** day of class. The Lead Instructor or course administrator should then fax the registration packet to the number listed on the registration form.

It is recommended that a fax confirmation page is printed and that customer service is contacted the next business day to confirm it was received in its entirety. Payment by check cannot be accommodated on the first day of the course.

**PLEASE NOTE:** The \$10 late fee will be charged per student for all non-electronic group registrations.

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### **Certification: Rescheduling, Substitutions and Cancellations** **Rescheduling Your Registration**

Any individual (or organization manager) is able to reschedule/ transfer his or her registration (the registrations of his or her agency's affiliates) to another course at any time, up to and including the first day of the original course. Payment for the original registration will be transferred to the new registration at no additional charge.

Individual: To do this, after logging into Online Services, choose VIEW COURSE REGISTRATION HISTORY from the action items list in your profile and select the registration you would like to reschedule/transfer.

Organization Manager: After logging into Online Services, choose CANCEL/RESCHEDULE/SUBSTITUTE REGISTRATION from the action items in the organization's profile, then select VIEW REGISTRATIONS for the individual. Select VIEW DETAILS.

Choose RESCHEDULE REGISTRATION from the actions items listed. Review the reschedule policy and click the link to continue. The policy is also stated below:

- *There is no fee charged for a reschedule*
- *You can reschedule your registration to a different course at any time up to and including the first day of class*
- *You can only reschedule to attend public courses with open seats*

Search for certification courses in your area and choose CONFIRM THE REGISTRATION RESCHEDULING on the course details page.

You will be notified by e-mail concerning the transfer and the details for the new course. The new registration will also appear in your profile under the action item VIEW COURSE REGISTRATION HISTORY.

**PLEASE NOTE:** Once you have rescheduled/transferred your (an affiliate's) registration, you are no longer eligible for a refund of any kind. However, you may reschedule and attend a different course.

### **Substitutions**

Any individual (or organization manager) is able to transfer his or her registration (registrations of his or her agency's affiliates) to another person at any time, up to and including the first day of the course. The individual or agency paying for the registration must be the same for both people. Payment of the original registration will be transferred to the new registration at no additional charge.

To be able to designate a person as a substitute, the new person must already have a profile in the Safe Kids system. The original student will need this person's SK ID to designate them as a substitute.

To designate a substitute, after logging into Online Services, the original student must choose VIEW COURSE REGISTRATION HISTORY from the action items list in his or her profile and select the registration he or she would like to submit a substitute.

Choose SUBSTITUTE REGISTRATION from the actions items listed. Review the substitution policy and click the link to continue. The policy is also stated below:

- *Once a substitution is made, a refund is no longer possible*

## Certification

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Enter the SK ID of the substituting person and click the SUBMIT button. Confirm the identity of the new person and click the link to complete the substitution.

Both students will be notified by e-mail concerning the transfer and the details for the new course. The new registration will also appear in his or her profile under the action item VIEW COURSE REGISTRATION HISTORY.

**PLEASE NOTE:** It is not possible to transfer a reservation. Only completed registrations can be transferred to another person.

**PLEASE NOTE:** Failure to properly register the substituting student may prohibit that student from being eligible for certification.

**PLEASE NOTE:** Due to the nature of substitution, instructor approval for the reservation and the subsequent registration will also be transferred to the new person.

## Cancellations

### *Course Cancellations*

If a course is cancelled by an instructor or course administrator, regardless of the reason, all registered students (or the organization manager) will be notified by email that they have the option to either reschedule/transfer their (his or her agency's affiliates) registration to another course or cancel the registration and receive a full refund.

### *Registration Cancellations*

All registration cancellations must be done online. Customer service is not able to accept cancellation requests.

All registration cancellations, excluding those caused by a cancelled course, are subject to the cancellation fees outlined in the cancellation policy below.

- *Cancellations made at least 10 days before the course start date will receive a refund of the course registration fee, minus a \$10 cancellation fee.*
- *Cancellations made nine days or less before the course start date will receive refund minus a \$30 late cancellation fee.*
- *No fees will be refunded for cancellations made on the first date of class*

In the case of an unexpected emergency, you may submit a Refund Request to Safe Kids for consideration which can be found in Resources->Forms. Be sure to include the required documentation of the emergency.

To cancel a registration, after logging into Online Services, choose VIEW COURSE REGISTRATION HISTORY from the action items list in your profile and select the registration you would like to cancel.

## Certification

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Choose CANCEL REGISTRATION from the actions items listed. Review the cancellation policy and click the link to continue. The policy is also stated below:

- *Any registrant can cancel their course registration at any point*
- *If the cancellation date is more than 10 days from the start date of the course, the system will refund the registration fee minus \$10 Cancellation fees*
- *If the cancellation date is between nine and one days prior to the start date of the course, the system will refund the registration fee minus \$30 Late Cancellation Fee*
- *If the cancellation is made on the first date of class, the system will NOT refund any the registration fee*
- *Substitute registrants cannot cancel registration, but can reschedule their registration for another public course*

Click on CONFIRM CANCELLATION to complete the request. You will be notified via email concerning the cancellation. The cancelled registration will also appear in your profile under the action item VIEW COURSE REGISTRATION HISTORY.

In the case of an emergency resulting in a student not being able to attend the course (medical, family), they may submit an Emergency Fee Refund form at the earliest possible time. It is available online at <http://cert.safekids.org> under Resources -> Forms (at the bottom).

# Certification

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## **Certification: During the Course Attendance**

Students are required to attend the entire certification course, complete both the hands-on and written exams and actively participate in the checkup event in order to remain eligible for certification.

## **Course Materials**

### *Certification Course*

All students will receive a bound copy of the technician workbook as part of their national program fee. This workbook is maintained and updated by the National Highway Traffic Safety Administration and is available online at [www.cpsboard.org](http://www.cpsboard.org).

## **Testing**

### *Certification Course*

Both written and hands-on skills assessments take place during the certification course. Instructors will award a pass/fail grade at the conclusion of each hands-on skills test. There are a series of three written quizzes. To pass the written part, technician candidates must get at least 42 (out of 50) questions correct overall. The passing score is 84 percent (42/50) correct.

The hands-on skills grade (pass/fail), check up event grade (pass/fail) and overall written grade are entered online at the end of the course by the Lead Instructor.

## **Certification: After the Course**

Safe Kids will mail official notification letters directly to newly certified technicians within 20 business days of the course being finalized by the Lead Instructor. Notifications of failure to qualify for certification will also be sent at that time.

Newly certified technicians are encouraged to log into their CPS online profile and print a wallet card/certificate.

## Certification

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### **Certification: Challenges, Complaints and Appeals**

Although you may file a written complaint about an instructor, test administration or the hands-on assessment process, Safe Kids will not accept appeals based on test questions or missed deadlines. The complaint should identify the problem area and provide specific details and background information to support the concerns.

All complaints and appeals must include clear supporting documentation and be postmarked within seven days for test administration- related incidents and 90 days for all other types incidents being addressed. Please complete and use the appeals form, available in Resources->Forms as a cover sheet for your submission.

Safe Kids will investigate and respond in writing to all complaints and appeals in as timely a manner as possible.

Appeals should include first-person examples, letters of support, and any other documentation. Any appeal is shared with the person challenged so they do see the name of the challenger and will have an opportunity to respond.

As appropriate, the National Child Passenger Safety Board and state CPS training contact will be consulted. Should this be the case, no identifying information will be provided to any member of the board or the CPS community.

**All decisions by Safe Kids are final and may not be brought up for another appeal.**

# Re-Certification

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## Re-certification: Overview

### Re-certification: Regular

#### *Description*

The certification cycle for both technicians and instructors is two years. In order to retain your certification, you must meet all of the requirements for and successfully complete the re-certification process.

There are two general steps to successful re-certification:

1. Meet all pre-registration requirements, including:
  1. Verified seat check activity (5 types)
  2. Community event (one check up or community workshop)
  3. Continuing education (6 hours)
  4. If CPSTI, teaching hours (20)
2. Register and pay for re-certification (this may be done up to four months prior to your certification cycle end date)

The re-certification fee is \$50 for technicians and instructor candidates and \$60 for instructors. If a certified individual is selected for audit and does not pass, no refund will be provided. A detailed fee table is available in Resources->Fees.

**PLEASE NOTE:** The re-certification process cannot be completed in a single day. Be sure to enter your seat checks, CEUs and Community Event as they are completed.

#### *Eligibility*

##### Technicians and Instructor Candidates

1. Have a current certification
2. Have a minimum of one of each of the five required seat checks logged in the system and verified by a certified instructor
3. Community event (one check up or community workshop) logged in the system
4. Continuing education logged in the system (6 hours)

##### Instructors

1. Meet eligibility requirement of technicians and instructor candidates
2. Have a minimum of 20 teaching hours logged in the system, at least 10 of which are from teaching the certification course

#### *Re-certification Reminders*

There are two different types of reminders sent out. However, it is your responsibility to make sure that your contact information is accurate so that you receive the reminders.

1. A personalized letter with username and password information will be sent to you approximately 8 weeks before your current certification expiration date.

## Re-Certification

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2. A personalized email with username and password information will be sent to you approximately 8 weeks before your current certification expiration date. In addition, there are constant reminders in the *CPS Express!*

### *Grace Period and Re-certification Deadline*

There is **NO GRACE PERIOD** for re-certification after your certification expires.

In order to remain eligible for re-certification, you must meet all pre-registration requirements prior to your current certification expiration date.

If you fail to meet these requirements on time, you are no longer eligible for regular re-certification. However, you will be eligible to take the Certification Renewal course, if available.

### *Failure to Re-certify*

You will fail to qualify for regular re-certification if one of the following occurs:

1. You do not successfully meet all pre-registration requirements
2. You do not register (pay) for re-certification prior to your current certification expiration date
3. You do not pass a re-certification audit

If any of the above occurs, you have two options:

1. Register for and take the one-day Certification Renewal course, if available
2. Repeat the Certification course - *Recommended for anyone who does not pass the Renewal Course.*

**PLEASE NOTE:** No refunds will be provided, as all processes have taken place. You may register for any subsequent course and pay all associated fees.

**PLEASE NOTE:** Regardless of the option chosen, instructors who fail to re-certify and wish to become instructors again are required to certify as technicians, apply for instructor candidacy, meeting all eligibility requirements, and successfully complete the candidacy process.

### **Re-certification: Late**

While Safe Kids cannot waive re-certification fees for anyone, we do consider active, non-domestic military duty a reasonable excuse for late re-certification.

If you were currently certified at the time of your assignment to overseas duty and provide official documentation of the assignment and its duration, Safe Kids will consider allowing you to re-certify without penalty.

You must contact us within three months after your return to the United States, provide required documentation and complete the re-certification process in a timely manner.

## Re-Certification

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### Re-certification: Certification Renewal Courses

Technicians whose certifications have expired are eligible to take the 8-hour Certification Renewal Course.

This class is designed to renew the certification for expired technicians who, again, wish to become nationally certified Child Passenger Safety Technicians (CPSTs). After successfully completing this class, students will be re-certified and be able to provide both individual and group CPS education. Teaching strategies include lecture, skills testing, and a written test.

**This is NOT an update/refresher class.** This course is meant for expired CPS Technicians who have maintained their child passenger safety knowledge and their hands-on skills. It is expected that students attempting to renew their certifications stayed involved in CPS programs and activities, have kept up with changes in the field by reading technical updates, attending other CPS classes, and working with non-expired technicians to keep their installation skills current, but who - for one reason or another - allowed their certifications to expire.

# Re-Certification

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## Pre-Registration Requirements for Regular Re-certification

### Re-certification: Pre-Registration Requirements for Regular Re-certification

In addition to being currently certified, there are four primary categories of requirements for re-certification. The first three, including seat check activity, community event and continuing education units (CEUs) are required for both technicians and instructors. The fourth, teaching hours, is only required for instructors.

### Logging Seat Check Activity

As a part of the re-certification process, all technicians and instructors are required to have a currently certified instructor or technician-proxy witness and verify (instructors only) a correct installation for each of the following configurations during that particular certification period:

- Rear-facing infant child safety seat
- Rear-facing convertible child safety seat
- Forward-facing child safety seat with harness
- Belt-positioning booster
- Installation with LATCH: LATCH requires a harnessed CR must be used following manufacturer instructions. A RF CR secured correctly using the lower anchors only would count. A tether must be used if it is required for a correct LATCH installation.

All seat checks are for the way the child restraint left. If the child arrives in a rear-facing only CR, and leaves in a RF convertible, it may be used as a RF convertible seat check.

All required installations must be logged into the online system and verified online by the instructor prior to registering for re-certification.

To log your required seats, after logging into Online Services, select the action item RECERTIFICATION...(ENTER INFORMATION) from the action items listed in your profile. On the reporting summary page, you can see the status of any previously reported activity for your current certification period. Click on [CLICK HERE TO ADD SEAT CHECKS](#). In the appropriate row (by seat type), enter the date of the check and instructor's name for each check. Search for each instructor by clicking on [LOOKUP INSTRUCTOR](#).

Once a seat check is logged, the verifying instructor will be sent an e-mail notification of the pending verification. Check your profile regularly. You can view the status of submitted seat checks by choosing RECERTIFICATION...(ENTER INFORMATION) from your action item list.

### Instructor Verification of Seat Check Activity

The primary purpose of instructor verification of the seat check activity required for re-certification is observation of your interaction with parents and children. The verifying instructor or their technician-proxy should feel confident in your ability to communicate accurate information to a parent or caregiver and should double-check that the installation and paperwork are appropriate and correct.

Direct observation helps ensure that communication with parents is accurate and consistent with the information and methodologies detailed in the standardized curriculum. The ideal has always been instructor observation of seat checks, and was strongly recommended by the National CPS Board.

We encourage all technicians and instructors to be proactive and supportive of each other in their efforts to maintain certification.

## Re-Certification

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The following guidelines were approved by the re-certification committee of the National CPS Board:

- During a seat check, it is always best to have the child present.
- Instructors and technicians are strongly encouraged to make every effort to do an actual safety seat checkup.
- If an actual caregiver is not available, the instructor may choose a mock scenario, where a colleague acts out the part of the parent.
- It is strongly encouraged that instructor verification of required seat check activity be completed on an ongoing basis throughout your certification cycle, rather waiting until near your certification expiration date.

Once a seat check is entered for verification, the instructor will be sent an email notification. As this email notification is provided as a courtesy, it is the responsibility of the instructor to review the requests. The email is not required to access the seat check verification request.

Instructors, to review seat checks submitted for your verification, log into Online Services and click on REVIEW/APPROVE SEAT CHECKS. You will see three separate tables. The first includes any seat checks that are pending your approval. Make any pass/fail designations needed and click SUBMIT.

As a side note, the second table includes seat checks that you have already passed or failed and those that were automatically approved for individuals that have not yet re-certified. You can change the pass/fail status for any of these seat checks as well. The final table includes seat checks that you have already passed or failed and those that were automatically approved for individuals that have re-certified. These cannot be changed, as the person's re-certification may have been dependent upon that approval.

**PLEASE NOTE:** As of April 1, 2010, seat checks are NO LONGER automatically approved after 14 days. If no action is taken, they remain pending (ungraded). If you are waiting for a seat check to be reviewed and it is pending, please follow up with the instructor directly.

### Using Technician Proxies for Verification of Seat Check Activity

#### *Designating a Technician-proxy*

Any currently certified instructor may designate a technician to serve as his or her proxy for observation and verification another individual's installations required for re-certification.

The designated technician-proxy would evaluate and provide feedback during the seat checks and then provide that information to the instructor, who has the ultimate responsibility of verifying the seat check online. Records documenting each check must be kept by both the instructor and technician-proxy for future reference.

#### *When to Use a Proxy*

While it is preferable to have all direct observations and verifications conducted by a currently certified instructor, Safe Kids recognizes that may not always be feasible.

## Re-Certification

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Below are some example cases in which a proxy could be used:

- A currently certified instructor is not available within 30 miles of a technician's residence or place of employment and neither the instructor nor the re-certifying individual are able to travel
- There is a very short timeframe in which to conduct the seat checks prior to an individual's certification expiration date
- Other scheduling conflicts
- An instructor needs assistance with the volume of seat checks needing to be observed and verified

**PLEASE NOTE:** Safe Kids recognizes that this policy is not for everyone. If an instructor does not wish to designate, or does not feel comfortable with designating this level of responsibility to a proxy, he or she is not obligated to do so.

**PLEASE NOTE:** Because of the documentation required and seriousness of the position, it is recommended that an instructor designate no more than two technician-proxies.

### *Proxy Eligibility Requirements and Recommendations*

Instructors interested in designating a proxy, must be aware of the requirements and recommendations as follows:

- **REQUIRED:** Is a currently certified technician
- **REQUIRED:** Has extensive hands-on experience
- **REQUIRED:** Will maintain or improve their level of knowledge and skill
- **REQUIRED:** Can provide and maintain a written history of CPS experience and training to the instructor (to be updated regularly)
- **REQUIRED:** Is an excellent communicator
- **RECOMMENDED:** Has a minimum of two years hands-on experience

**PLEASE NOTE:** Instructors may develop additional requirements to supplement those listed.

### *Instructor Responsibilities*

- Maintain instructor certification
- Designate an eligible, trustworthy technician as their proxy
- Maintain close contact with the proxy regarding all seat check activity he or she is observing
- Maintain adequate records regarding each seat check activity, including the proxy's name, date, seat check type, person observed checking the seat, etc. (a log sheet is available in Resources->Forms)
- Review the proxy's history of CPS experience and training regularly to determine continued eligibility
- Verify all seat check activity observed by your proxy(ies) online
- The instructor is ultimately responsible for the quality and accuracy of all seat check observations conducted by his or her proxy

**PLEASE NOTE:** If the instructor's certification expires, by default, any designated proxy(ies) are no longer eligible to observe seat checks on behalf of that instructor.

# Re-Certification

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## *Proxy Responsibilities*

- Maintain technician certification
- Follow instructor seat check verification guidelines and recommendations as outlined in the policies and procedures manual
- Maintain close contact with the instructor regarding all seat check activity being observed
- Maintain adequate records regarding each seat check activity, including the technician's name, date, seat check type, etc. (a log sheet is available in Resources->Forms)
- Actively seek to maintain or increase your current level of CPS knowledge and skills
- Submit your updated history of CPS experience and training to the instructor regularly

## *Verification Process When Using a Proxy*

1. Instructor selects/trains the technician-proxy
2. Proxy observes seat checks, instructing the re-certifying individual to use the instructor's certification ID number when logging the activity online.
3. Proxy sends instructor their verification log sheet (minimum recommended tracking system, available for download) detailing their name and who was observed for which seat.
4. When logging the seat check into the online system, the re-certifying technician must enter the instructor's certification ID.
5. Instructor will verify the seat check online

**PLEASE NOTE:** Technicians designated to serve as proxies may only do so in relation to the seat checks required for re-certification. This policy is not intended to supersede any local standards or requirements for seat verification outside of the re-certification process for national CPS certification (e.g. Safe Kids Buckle Up Senior Checker requirement for their events).

**PLEASE NOTE:** If any instructor or proxy is found abusing this system, action may be taken by the certifying body. Any abuse by the technician-proxy falls under the responsibility of the instructor.

## **Community Event**

All technicians and instructors are required to participate in at least one community event. This event must be logged into the online system.

1. Two-hour check up event with at least one other CPS Technician at which you serve families using any standardized checklist to provide documentation, if needed.
2. Provide at least four hours of community education. Examples include presenting to parents, educators, kids, organizations (PTAs, law enforcement). These are presentations to non-CPSTs. Technicians are welcome to combine different presentations to meet the time requirement (e.g. 4 one-hour education sessions).

# Re-Certification

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## Continuing Education

All technicians and instructors are required to log at least six hours of CPS technical continuing education (CEUs) into the system. The CEUs must be obtained and reported during one's current certification cycle (two years). There is no carry-over from one period to the next, even when more than the required CEUs have been accumulated. CEUs must fit into one of the five approved categories and meet content requirements.

A 45 or 50-minute session may be rounded up and counted as 1 hour of continuing education. Sessions shorter than 45 minutes may not be included.

### Categories of CEUs

1. In-person Session/Workshop (maximum 6 CEUs)
2. Observing a CPS Certification Course – *No longer available*
3. Teleconferences (max. 5 CEUs)
4. Online/Web sessions (max. 5 CEUs)
5. Newsletters/Manuals/Journals (max. 3 CEUs)

### Technicians and instructors may mix and match categories to meet the six required hours of continuing education.

All categories of CEUs must meet the content requirements of improving CPS technical knowledge such as LATCH, a child restraint manufacturer workshop or CPS technical update. Non-technical CPS sessions, such as how to get funding or run an inspection station, do not qualify. Examples are provided in FAQs.

## Details and audit requirements for each CEU category

### Category #1: In-person Session/Workshop

- A. Maximum allowable hours: 6
- B. Description: You must attend a structured presentation/session that meets content requirements during the certification cycle. **You are encouraged to get your information from more than one person or source.**
  1. Event examples: **Must meet content requirements**
    - a) Local, regional or state CPS meetings
    - b) A CPST attends a national meeting and then provides a formal update locally to CPSTs.
    - c) "CPS on School Buses" course (NHTSA)
    - d) "Safe Travel for All Children: Transporting Children with Special Health Care Needs" (Automotive Safety Program at Riley Hospital for Children, [www.preventinjury.org](http://www.preventinjury.org))
      - (a) For this significantly advanced course, CPSTs may submit CEUs for this course taken 3 years prior to their certification expiration date, extending beyond the usual 2 years. One time only.
    - e) National conference sessions discussing technical CPS skills (ex: Lifesavers, American Academy of Pediatrics, etc.)
    - f) Because the following courses do not contain more information than is in the basic CPS certification course, they **do not qualify** for CPS CEUs: Op-Kids LE, Op-Kids RN, Safe Native American Passengers, Moving Kids Safely in Childcare.

## Re-Certification

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2. **You may not include your original certification course**
  3. **Check up events, while valuable, do not qualify for CEUs.** They do not qualify for continuing education as it is already required in other re-certification areas.
- C. CPS Certified presenters at local, state or national meetings may apply 1.5 hours for every hour developed and taught. CPS Certified presenters may obtain CEUs for any session they observe (as a member of the audience). Example: If they attend a 4-CEU approved update, they may obtain 4 CEUs.
1. Maximum allowable hours: 3
  2. The audience for these sessions must be primarily CPSTs (not the general public), necessitating that the CPST conduct research to obtain the **latest** information.
  3. You may count each session once. For example, if you provide three sessions of the same workshop, it only counts one time, even if they are offered at different venues/locations.
  4. Members of the CPS course instructor team may not include the Certification or Renewal courses for CEUs. Teaching hours are required as part of your re-certification. Watching other instructors while on the team is part of the general course instructor experience.
  5. **CONTENT ALERT:** If a certified presenter provides information contrary to best practice or based on rumors, they may be brought up for certification appeal.
  6. **Presenters:** CPS technicians or instructors may present material that has been downloaded from CPS technical conferences, such as Lifesavers, with permission of author that has completed pre-approved CEUs. Presentations may be available from reputable sources, such as SafeKidsWebinars.org and the CPS Board. One CEU for every one hour taught and may count each session once.
    - (a) For example, if you provide three sessions of the same workshop, it only counts one time, even if they are offered at different venues/locations.
    - (b) If you offer a pre-approved presentation again (same agenda), please email [kchausmer@safekids.org](mailto:kchausmer@safekids.org) with the (1) previously assigned Event ID, (2) new date, (3) city and (4) confirm that the content has been reviewed and is up to date. Safe Kids will add the session without any more paperwork, sending a confirmation email that it has been processed.
    - (c) Be sure to update presentations with new resources and documented scientific journal articles as required for CEUs
- D. Audit requirements
1. Event information (one required) if not pre-approved with an Event ID#
    - a) Copy of meeting/conference agendas  
Must include the session title, date and time
    - b) Printed copy of presentation
    - c) Copy of the session description from the official conference program. The sessions that you attended must be clearly marked
  2. Proof of attendance (one required)
    - a) Certificate with topic, date and times
    - b) Personal letter/email from event provider. Must include the session title, date and time.
    - c) Copy of sign in sheet with your name circled. Must include the session title, date and time.

Category #2: Observe a Certification Course (rev. 6/1/2009)

**ALERT: Since the intent of CEUs is to get updated information, this option is no longer available. Please choose an alternative CEU Category.**

Audit information

1. Maximum allowable hours: 3

## Re-Certification

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2. Description: Technicians may sit in and observe a national Certification Course for a maximum of 3 CEU hours. Every hour of classroom auditing (outside skills work does not count; classroom time only) may apply ½ CEU towards re-certification.
  
3. Audit requirements
  1. Certification Course ID#
  2. Personalized letter/email from the Lead Instructor confirming specific dates and times of attendance.

### Category #3: Teleconferences

- A. Maximum allowable hours: 5
- B. Description
  1. A teleconference is a call with a moderator and many callers. Participants call into a designated number to listen in on the call. Depending on the format established by the moderator, it may be listen-only or allow interaction by participants.
  2. Teleconference calls that meet content requirements for CEUs may be applied towards re-certification. To qualify for CEUs, there must be a formal agenda published in advance. Call notes and confirmation of attendance must be provided to attendees.
    - a) Examples of attendance confirmation are:
      - (a) Roll call
      - (b) Automated call tracking (system records call in number and facilitator matches call in numbers to CPST).
      - (c) Participants are given a special code at some point during the call and have a specified amount of time to contact the facilitator (such as "Please email (fax) the call code SAFE6742 to the facilitator no later than 5 pm tomorrow to be added to the official call roster. You must be on the official call roster to use this call for re-certification CEUs.")
- C. Audit requirements
  1. Event information (one required) if not pre-approved with an Event ID#
    - a) Agenda with dates, times and objectives
    - b) Official call minutes or notes provided by moderator/sponsor
  2. Proof of attendance (one required)
    - a) Certificate with topic, date and times
    - b) Personalized letter/email from the Lead Instructor confirming specific dates and times of attendance.
    - c) Official call minutes or notes provided by moderator/sponsor with list of attendees

### Category #4: Online/Web sessions

- A. Maximum allowable hours: 5
- B. Description: Interactive Web update or online course that meets content requirements for CEUs. There are two types on online course: those that are moderated (e.g. can ask questions) and un-moderated (e.g. PowerPoint presentation). Non-moderated sessions must have an assessment component, such as a quiz, to receive credit. A passing grade is 80%.
- C. Audit requirements
  1. Event information (one required) if not pre-approved with an Event ID#
    - a) Copy of event agenda/outline/objectives  
Must include the session title, presenter name, date and time
    - b) Printed copy of presentation
    - c) Copy of the event description from the official event provider (summary)
  2. Proof of attendance (one required)
    - a) Certificate with topic, date and times

## Re-Certification

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- b) Personal letter/email from event provider
- c) Print out of completion confirmation page. Must include the session title, date and time.

### Category #5: Newsletters/Manuals/Journals

- A. Maximum allowable hours: 3
- B. Description: Eligible newsletters must have national circulation with primarily CPS technical content geared towards CPSTs. They must be peer-reviewed (e.g. review committee) and approved by the certifying body. e.g. Tech Update, Journal of the American Medical Association, Pediatrics, STAPP
- C. Approved publications and audit requirements
  - 1. Free Newsletters
    - a) Tech Update
      - (a) Publisher: NHTSA
      - (b) Published online semi-annually on the CPS Board Web site
      - (c) For more information: <http://www.cpsboard.org>
      - (d) Quizzes
        - Provided if selected for audit (see below)
        - Based on editions submitted for CEUs
    - b) Audit requirements
      - (a) Quizzes provided when selected for audit
      - (b) 2 passing (80%) quizzes are required for 1 CEU; 1 CEU maximum
  - 2. Purchased Newsletters – Proof of purchase provided by publisher
    - a) Safe Ride News
      - (a) Publisher: Safe Ride News
      - (b) Printed bi-monthly
      - (c) For more information: <http://saferidenews.com/>
    - b) SafetyBeltSafe News
      - (a) Publisher: SafetyBeltSafe U.S.A.
      - (b) Printed bi-monthly
      - (c) For more information: <http://carseat.org/>
    - c) 1 CEU per year of subscription
    - d) Audit requirements
      - (a) Publication name
      - (b) Proof of purchase provided by publisher (NOT Safe Kids) must include:
        - Name of technician or technician instructor
        - Date of proof of purchase
        - Dates of subscription/total CEU eligible (1 CEU per one year) during certification cycle
  - 3. Manuals
    - a) LATCH manual
      - (a) Publisher: Safe Ride News
      - (b) Latest edition: 2009
      - (c) For more information: <http://www.saferidenews.com/>
      - (d) Audit requirement
        - Technicians must provide completed 2007 **or** 2009 quiz (provided by Safe Ride News at [http://www.saferidenews.com](http://www.saferidenews.com/)) to auditor with a passing grade of 80 percent. One CEU per completed quiz. One CEU maximum.
    - b) Child Restraint Manufacturers' Instructions (CRMI) or individual instruction manuals
      - (a) Publisher of CRMI CD-ROM: SafetyBeltSafe U.S.A.
      - (b) Latest edition: 2009
      - (c) For more information: <http://carseat.org/>
      - (d) Audit requirement

## Re-Certification

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- Technicians must complete and submit quiz via email to SafetyBeltSafe U.S.A. (<http://www.carseat.org/>). Technicians will be provided with audit documentation via email from SafetyBeltSafe U.S.A. One CEU per completed quiz. One CEU maximum.
4. Scientific journals/Conference Proceedings
- a) Read 3 published CPS-related articles may be submitted for 1 CEU maximum. Must be a peer-reviewed, national, scientific publication (e.g. Journal of the American Medical Association, Pediatrics, STAPP)
  - b) Audit requirements
    - (a) Issue and volume of issue containing article
    - (b) Approved purchased newsletters (named above) may not be used for this.
    - (c) Complete copies of articles/proceedings must be provided.

## Re-Certification

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### Teaching Hours

In addition to the previously mentioned requirements, instructors must also have a minimum of 20 hours of lecturing and hands-on teaching during the current two-year certification cycle, at least 10 of which must be earned teaching the Certification course. The additional hours may involve mentoring, teaching the Certification Renewal course or a combination of both.

NOTE: Teaching hours as an IC do not count toward recertification.

Teaching hours are automatically tracked by the system when the Lead Instructor enters the teaching hours during the course finalization process. Individual instructors are not responsible for inputting their own teaching hours.

Calculation of teaching hours:

Teaching hours are based on the number of hours of lecture and participation in hands-on skills exercises and testing. Just being in the classroom does not qualify for teaching hours.

Example 1: You were an instructor with no lecture time, but participated in eight hours of hands-on work. You earned eight teaching hours.

Example 2: You were an instructor with five hours of lecture and 10 hours of hands-on work (includes 3 hours working with students at the check up). You earned 15 teaching hours.

**Mentors** can get up to 8 hours for being a mentor. If the CPSTI teaches or does hands-on work (as above), please also add them as an instructor.

**Lead Instructors** can get up to 10 hours for being a LI for a Certification Course. If they also teach or do hands-on work (as above), please also add 10 to these teaching hours.

# Re-Certification

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## Recertification: Registration

All registration must be done online. However, you can pay either online with a credit/debit/check card or manually with a check, purchase order or money order. Charges will appear on the credit/debit/check statement as "Safe Kids Worldwide".

## Re-certification: Regular

Once you have met all of the pre-registration requirements and it is within four months of your current certification expiration date, a button will appear on your re-certification activities summary page. Click this button to begin the re-certification process.

You have the option to either continue, and pay online with a credit/debit/check card, purchase order or e-voucher, or print out a registration form to complete and submit with a check, purchase order or money order. The mailing address, fax number and phone number for submitting registrations can be found on the registration form.

**PLEASE NOTE:** Registration must have been completed (either online or received by Safe Kids) prior to the expiration date of the current certification cycle in order to remain eligible for re-certification.

## Re-certification: Regular: Auditing

CEU completion is reported in the re-certification registration process as a single check-off. Unlike the five required seat checks, CEUs are not verified online.

CEUs are **self-certified**. Technicians and instructors are responsible for their certification like manufacturers are responsible for crash testing. They are required to keep personal written proof of the types and content of their CEU achievements.

A random sample of completed re-certifications will be audited. Each category has specific written documentation requirements. The purpose of the audit is to verify existence of documentation of CEUs being completed and in accordance with policies and procedures of the certifying body.

CEU documentation is to be kept during the certification cycle and for at least three months after re-certification is completed.

Keeping CEU documentation longer is strongly recommended for your future reference, but is not required.

**Seat checks and Community Events are NOT audited. This process is specifically for CEUs.**

**Safe Kids Worldwide will not return audited materials.** SKW will share audit conclusions rather than raw material with states overseeing CPSTs in the field.

**Revocation:** CPS certification will be revoked (status will be changed to "expired") if you fail to provide the required documentation within the specified time as detailed in the audit notification, if any documentation is falsified, or if the CEUs do not meet content or category requirements.

- (1) Examples of inappropriate content: red light running, adult occupant protection, seat belt/car seat enforcement, drunk driving
- (2) Examples of inappropriate category: Check up event, original certification course

## Re-Certification

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### Re-Certification: Certification Renewal Courses

Registration for Certification Renewal courses is the same as the registration process for regular certification courses. Any course can be either public or controlled. Public courses are open to all individuals, while controlled courses are open only to individuals approved by the Lead Instructor. Anyone can request a reservation to attend the course. If approved, he or she will be able to complete their registration by paying the course fees. For details, please see the Certification section.

**PLEASE NOTE:** If you do not know your log-in information (username and password), please call customer service. All formerly certified individuals already have an online profile. **You cannot register for this course if you create a new profile.**

### Challenges, Complaints and Appeals

**CONTENT ALERT:** If a CPS-certified presenter provides information contrary to best practice or based on rumors, they may be brought up for certification appeal.

Although you may file a written complaint about inclusion of a CEU(s), Safe Kids will not accept appeals based on missed deadlines.

All complaints and appeals must include clear supporting documentation and be postmarked within 30 days of notification of audit findings. Please complete and use the appeals form, available in Resources->Forms as a cover sheet for your submission.

Safe Kids will investigate and respond in writing to all complaints and appeals in as timely a manner as possible.

Appeals should include first-person examples, letters of support, and any other documentation. Any appeal is shared with the person challenged so they do see the name of the challenger and will have an opportunity to respond.

As appropriate, the National Child Passenger Safety Board and your state CPS training contact will be consulted. Should this be the case, no identifying information will be provided to any member of the board or the CPS community.

All decisions by Safe Kids are final and may not be brought up for another appeal.

# Course Admin/Lead Instr

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## Course Administration: Overview Eligibility

Any CPSTI or authorized course administrator can register and schedule a course. If you are not included in one of these categories and are responsible for setting up courses, please submit a Course Administrator Application, which can be found on the Web site under Resources->Forms.

**PLEASE NOTE:** Although Safe Kids allows members of any of the groups above to administer and set up training courses, there may be additional state or local qualifications. Please check with your state CPS coordinator to ensure that all state and local policies are followed.

## Course Types

### *Certification Course*

The national standardized child passenger safety technician certification course is usually four to five days long and combines classroom instruction, hands-on work with car seats and in vehicles, and a community safety seat checkup event. Successful completion of this course certifies the individual as a national CPS technician for two years.

The certification course is available in English. All official written documentation, including correspondence with technician-candidates and certified individuals, and the Web site will continue to be in English. There are Spanish-speaking customer service representatives available to field inquiries and assist individuals in navigating the Web site.

### *Renewal Course*

This eight-hour course was developed to help former technicians regain their CPST certification. Individuals must be in the system as having been nationally certified at some time (status = expired). It provides a very brief overview of the technical information contained in the most recent version of the NHTSA curriculum and verifies technical skills through a series of hands-on assessments and a written test.

This course is designed for those who have stayed active in the field of CPS. Any technician who does not pass the Renewal Course is encouraged to take the full Certification course, rather than taking the Renewal course again.

## Class Types

### *Public Course*

A public course is open to all individuals.

### *Controlled Course*

A controlled course is open only to individuals approved by the Lead Instructor. When administering a controlled course, the course administrator has responsibilities during the student registration process. The system will allow anyone to reserve a seat for any controlled class. However, it is the course administrator's responsibility to approve or deny that reservation request. Once approved or denied, the potential student will receive e-mail notification and, if approved, will be able to complete their registration by paying the course fees.

## Course Admin/Lead Instr

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Some of the benefits of this process are the ability (1) to post a partially public class and (2) to more easily manage local fees.

### Example One

You are conducting a course with a total of 15 open seats. Ten of the seats are reserved for students from the local police department, and you want to open up the other five seats to the public. This system will allow anyone from the public to reserve a seat, but you as the course administrator, have the power to approve only five of the reservation requests from community members and leave the other ten seats open for the police department. Similarly, if the police department later decides to send only eight people, you can still open up the other two seats to the public.

### Example Two

You are conducting a course and need to charge local fees of \$100 dollars. Because this system will allow anyone from the public to reserve a seat, but not to complete his or her registration without approval, you can:

1. State in the course description to submit payment of \$175 directly to you and then only approve those that have submitted payment. You can then submit to Safe Kids the \$75 for each individual to complete their registration for the course.
2. State in the course description to submit payment of \$100 directly to you and then only approve those that have submitted payment. The individuals would then complete their registration by submitting the \$75 national program fee to Safe Kids.

## Course Admin/Lead Instr

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### Course Administration: Adding/Editing/Canceling Courses Adding New Courses

All Certification and Renewal courses must be set up online a minimum of six weeks before the course start date. Certification courses require at least 24 scheduled hours. Certification Renewal Courses require at least 8 scheduled hours. Instructors are welcome to offer the courses over a longer period of time.

To add a new course, after logging into Online Services, choose ADD A NEW COURSE from the action items list in your profile. Enter the course information and click the SUBMIT button.

*Note:* Only Certified Instructors who have successfully completed the Lead Instructor (LI) quiz may be added as an LI. Any Certified Instructor who wishes to be an LI may take the quiz by clicking on the action item APPLY TO BE A LEAD INSTRUCTOR" in their CPS online profile. Once completed, this action item no longer appears.

*Note:* You can use the course description field to communicate additional requirements and directions. These include, but are not limited to, dress requirements, meal information, social activities and use of personal vehicles. Please refer to the NSCPSTP Instructor Guide for helpful guidelines on planning and organizing a course.

Add the course dates and times. Click FINISHED ADDING when you're done.

*Note:* The wait list is a way for people to electronically wait in line when the course is full. Check the WAIT LIST box if you'd like this option.

*Note:* You can edit or delete the dates you've already added if you made a mistake.

Add the members of the instructor team. If the team has not been determined, you can skip this step by clicking the FINISHED button. You must enter at least one Assistant Instructor to be able to make the course active.

You now have created a course with the status of PENDING. You will see a message at the top of the course details page stating that you still need to activate the course for it to be available for registration.

#### *Instructor Team*

All courses require at least 2 CPSTIs.

Listing the members of the instructor team is required to activate any course. Each instructor must be listed once for each role he or she will serve. For example, if John Smith is serving as both an assistant instructor and a mentor instructor, then he should be listed twice, once as an assistant and once as a mentor.

When adding an instructor candidate to the team, you must first add an instructor to serve as their primary mentor. This person will be the primary point of contact for any questions or concerns about the candidate's evaluation and is responsible for daily reviews with the candidate. Be sure to add a mentor prior to adding any instructor candidates to the list, as you cannot add the candidate first.

While none of the following are required, please keep these following recommendations in mind when putting together an instructor team:

## Course Admin/Lead Instr

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- The recommended ratio of students to instructors is 5:1 for all Certification and Renewal courses. When applicable, this includes instructor candidates.
- No more than three instructor candidates should teach during a single certification course.
- The mentoring instructor should teach as little as possible so he or she may devote his or her full attention to the candidate.
- The Lead Instructor should not also act as a mentor due to the number of responsibilities he or she already has as the head of the instructor team.

**PLEASE NOTE:** Mentor instructors and instructor candidates can only be designated for a Certification course. Renewal courses can only include lead and assistant instructors.

**PLEASE NOTE:** An instructor candidacy applicant must be listed in the instructor teams as an instructor candidate for a specific course prior to teaching during that course. Failure to do so can prohibit the evaluation from being accepted for the instructor candidate AND jeopardize the validity of the certification for ALL STUDENTS participating in that course.

### *Activating a Course*

When the course administrator clicks to activate a course, the system will automatically verify the data entered for the following required data (some fields may be changed after activation):

- Course type (certification, renewal)
- Class type (public or controlled)
- Location
- Dates and times
- Maximum number of students allowed
- Names and certification ID numbers for the instructor team
- Number of manuals needed
- Shipping contact and street address

Once activated, the course administrator will receive an e-mail notification of creation of the new course. Courses are automatically posted online and available for student registration. Listings of both public and controlled courses will be available through the online course search tool and all information open to the public. Registration for controlled courses will be pending Lead Instructor approval.

**PLEASE NOTE:** Once a course is active, the course dates cannot be changed. In these instances, the current course must be cancelled and a new one created.

**PLEASE NOTE: MATERIALS** - Since unused student manuals are kept, when you register a new course, subtract the number of manuals you have left from the total number of seats and request that number of manuals. **EXAMPLE:** If you have 5 manuals left from a previous course and you are adding a course with 15 seats, request only 10 manuals when you set up the course online.

## Course Admin/Lead Instr

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### Editing Courses

Once activated, the course administrator or Lead Instructor can make limited changes to the course. These include:

- Changing the maximum number of students (up to three weeks before the course or materials have been shipped)
- Materials shipping information (up to three weeks before the course or materials have been shipped)
- Course location
- Instructor team

To edit a course you've created, after logging into Online Services, choose **MANAGE MY COURSES** from the action items list in your profile. Choose the course you'd like to edit (finalized and cancelled courses cannot be edited). From the course details page, you have two choices for edits. To edit the instructor team, there is a link to set up course instructors in the course instructors section of the page. To edit things such as location, shipping, number of students, etc., choose **EDIT COURSE** from the action items list. Make any changes needed and click **SUBMIT**.

Although an e-mail will be sent to any registered technician candidates and the instructor team notifying them of any changes, the course administrator should notify registered participants of major changes, such as course location.

**PLEASE NOTE:** Once a course is active, the course dates, course type, and language cannot be changed. In these instances, the current course must be cancelled and a new one created.

### Canceling a Course

The course administrator or Lead Instructor may cancel a course at any time prior to the start date of the course.

To cancel a course you've created, after logging into Online Services, choose **MANAGE MY COURSES** from the action items list in your profile. Choose the course you'd like to cancel. From the course details page, choose **CANCEL THIS COURSE** from the action items list. Review the cancellation policy and confirm the cancellation by clicking on the button. The system will ask a second time to be sure you want to cancel. Click **OK** if you're sure you want to cancel the course.

You will now see a summary page of the e-mail notifications that were sent concerning the cancellation. Technician candidates will now have the option to either reschedule their registration for another course or to cancel the registration and receive a full refund.

**PLEASE NOTE:** Although an e-mail will be sent to any registered technician candidates and the instructor team notifying them of the cancellation, it is the responsibility of the Lead Instructor or course administrator to notify all registered individuals of the cancellation.

## Course Admin/Lead Instr

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### **Course Administration: Before the Course Registration Requests for Controlled Courses**

When administering a controlled course, the Lead Instructor has on-going responsibilities during the student registration process.

The system allows any eligible potential student to request a reservation for a seat for any controlled class. The Lead Instructor receives notification of incoming requests by email. Although the course administrator may approve or deny a request, only the Lead Instructor gets the notification, and it is the Lead Instructor's ultimate responsibility to log into the system and check for any pending requests regularly.

Once approved or denied, the potential student will receive e-mail notification and, if approved, will be able to complete their registration by paying the course fees.

Registration requests that are neither approved nor denied remain pending. There is no automatic approval.

Students will receive e-mail notifications for all reservation status changes.

To review registration requests, after logging into Online Services, choose **MANAGE MY COURSES** from the action items list in your profile. Choose the course you'd like to view. From the course details page, choose **VIEW REGISTRATION REQUESTS** from the action items list. Make any approvals or denials needed and click **SUBMIT**.

**PLEASE NOTE:** The Lead Instructor for the course will be sent an automatic e-mail notification when a reservation request is made. The instructor has the ability to cancel a reservation as long as the individual has not already paid, completing the registration process.

**PLEASE NOTE:** Due to the nature of substitution, if a currently registered student chooses to transfer his or her registration to another a person, instructor approval for the original reservation and subsequent registration will also be transferred.

**PLEASE NOTE:** Once a reservation request has been denied or cancelled, it can not be re-approved. However, approved reservations that have timed out (reservations are only held for 10 days), can be re-approved, giving the registrant another 10 days to submit payment.

## Course Admin/Lead Instr

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### Materials

#### *Materials Checklists*

Please be sure to check ALL boxes prior to contacting customer service about missing items.

#### Certification course

- Course Roster
- Technician workbooks (number designated at time of course setup)
- Return shipping label for IC evaluations
- Packing tape

#### Renewal Course

- Course Roster
- Technician workbooks (number designated at time of course setup)

#### *Shipment Times*

Materials are shipped by UPS Ground approximately three weeks prior to the course start date for all domestic courses excluding U.S. territories. For courses held in U.S. territories and non-domestic military bases, materials are generally shipped approximately four weeks before the course start date.

Provided that Safe Kids has a valid e-mail address on file, the Lead Instructor will receive an e-mail with shipping information and the tracking number, once the shipment has been made.

### Walk-ins

Walk-in registrations are allowed at the discretion of the instructor team and can only be accommodated if there is space available. **The number of students cannot exceed the amount of materials available. No additional materials will be sent.**

All registrations must be submitted by midnight of the first day of the course following normal registration procedures. Failure to do so will prevent the student from being eligible for certification.

All walk-in registrations will be charged a \$10 late fee. These late fees will be waived for individuals completing the registration and payment process online using a credit/debit/check card, purchase order or e-voucher. If the student is paying with a purchase order that is not registered in the system (see Organization Management section), he or she must register online and print his or her registration form, add the payment information and give it and a copy of the P.O. to the Lead Instructor or course administrator the FIRST day of class. The Lead Instructor or course administrator should then fax the registration packet to the number listed on the registration form (fax: 917-305-9876).

It is recommended that a fax confirmation page is printed and that customer service is contacted the next business day to confirm it was received in its entirety.

Payment by check cannot be accommodated on the first day of the course.

## Course Admin/Lead Instr

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**PLEASE NOTE:** The \$10 late fee will be charged **per student** for all group registrations.

### Course Rosters

The Lead Instructor is responsible for ensuring the accuracy of the course roster. Your roster must list all of the people in your classroom.

A copy of the roster (at time of shipment) is sent with the course materials. However, the Lead Instructor or course administrator is responsible for printing the most current course roster from the online system immediately prior to the start of course.

**In order for the certifications to be processed promptly after the completion of the course, all students must be listed on the roster.**

Should a non-registered student arrive for the course, he or she has three options:

1. Register and pay online with a credit/debit/check card
2. Register online and print the personalized registration form and fax it with a purchase order to customer service at 917-305-9876
3. Provide proof that he or she has submitted a complete registration and payment to Safe Kids (e.g. fax confirmation page with registration and P.O., tracking information with registration form and copy of check)

**PLEASE NOTE:** Payment by check or money order cannot be accepted on the first day of the course.

## **Course Admin/Lead Instr**

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### **Course Administration: During the Course**

The Lead Instructor is responsible for making sure the roster accurately reflects all students and instructor team, including Instructor Candidates, by the end of the first day of the course.

It also their responsibility to monitor the course to be sure all Policies and Procedures are followed. Therefore, they must be present and attentive for the entire course. Should an LI not be able to so, they should log in and update the course profile to reflect a different LI.

As it is a national standardized curriculum, you must only use the slides provided by NHTSA and cannot make your own slides or edit the ones provided.

Any course is subject to surprise auditing by the Quality Assurance Specialist.

### **Hands-on Assessment**

The Lead Instructor is responsible for submitting hands-on pass/fail scores for each at the end of the course. Students must pass all skills assessments, including vehicle occupant protection system identification, selecting and securing child restraints, and identifying misuse in order to pass the overall hands-on section of the course.

For Certification Course skills assessments, an instructor candidate may sign off/grade students under the supervision of their mentor using their T#. Their mentor will sign behind the IC. ICs may not teach the Renewal course.

For Certification Courses, each student has three opportunities to pass each skill assessment. For Certification Renewal Courses, each student has two opportunities to pass each skill assessment. Should the student fail any section of any assessment, he or she is not eligible for certification and must re-take and pass a certification course (Renewal if previously certified) to become certified.

### **Checkup Event**

The Lead Instructor is responsible for submitting checkup pass/fail scores for each technician candidate at the end of the course. Each technician candidate must actively participate, demonstrating correct technical skill and appropriate communication at a safety seat checkup event to pass this section of the course.

### **Written Exam**

*On-site Scoring*

## **Course Admin/Lead Instr**

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The Lead Instructor is responsible for overseeing all quiz grading and entering a final grade online. The instructor team is equally responsible for ensuring that under no circumstances is a student exam answer sheet modified by any student, member of the instructor team or other person, except in the case of a grading discrepancy as described in the exam administration guidelines.

The Lead Instructor must be extremely careful when entering grades online to be sure they are accurate and correct.

Once student scores are entered online, the Lead Instructor must keep the Course Grade Sheet as a record of the student grades and may destroy any used tests.

### **Special Needs and Accommodations**

Students with special needs should send a written request to the Lead Instructor before the start date of the course, documenting the need and specifying the accommodation requested. Most accommodations may be made on-site at the discretion of the instructor team.

Should any student require assistance with the physical requirements of the course, the instructor team will accommodate the student by assigning an instructor to install seats following the student's specific instruction in each step of the selection, direction, and location process.

For any accommodations given, please note the student's name and a description of the accommodation and keep on file for at least 2 years (one certification cycle).

## Course Admin/Lead Instr

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### Course Administration: After the Course Course Finalization

#### *Submit Post-course Information Online*

The Lead Instructor is responsible for submitting the following online after completion of all Certification and Renewal courses:

- Hands-on pass/fail scores: a passing grade requires that the student passes all hands-on skills assessments
- Checkup attendance pass/fail score (Certification course only): a passing grade requires that the student attends and actively participates in a safety seat checkup event
- Written score: a passing grade requires that the student get at least 42 out of 50 (84%) questions correct
- Instructor candidate pass/fail evaluations (Certification course only): the written evaluation must be submitted to Safe Kids with the other return materials. If an IC is marked as failed, they have up to one year from the date they were approved as an IC to successfully teach a class.
- Actual teaching hours for each instructor: this should be as accurate as possible to ensure appropriate credit for re-certification. Once entered, these hours cannot be adjusted. No need to round to the nearest hour.

**NOTE:** IC hours are included for course tracking purposes. They are not applied towards the 20 required teaching hours for re-certification.

Teaching hours are based on the number of hours of lecture and participation in hands-on skills exercises and testing. Just being in the classroom does not qualify for teaching hours.

*Example 1:* You were a Lead Instructor with no lecture time, but participated in eight hours of hands-on work. You earned eight teaching hours.

*Example 2:* You were an assisting (non-lead) instructor with five hours of lecture and 10 hours of hands-on work (includes 3 hours working with students at the check up). You earned 15 teaching hours.

**Mentors** can get up to 8 hours for being a mentor. If the CPSTI teaches or does hands-on work (as above), please also add them as an instructor.

**Lead Instructors** can get up to 10 hours for being a LI for a Certification Course. If they also teach or do hands-on work (as above), please also add 10 to these teaching hours. **EXAMPLE:** The LI teaches for 2 hours and works the check up event for 3 hours. The LI can get a total of 15 teaching hours.

Once these items are submitted online, the course enters a status of "Pending Finalization." This status will remain until all practical and the final exam scores (for Certification courses) are submitted and attached to the course roster. All information for the course must be correct. Failure to contact Safe Kids Worldwide immediately following data entry error may result in sanctions, including possible loss of instructor status.

PLEASE NOTE: Student scores do not have to be entered at once, however, the course can not be finalized nor pass/fail letters generated without all scores entered.

Once all grades/scores are entered and the course is finalized, the Lead Instructor or course administrator will be able to print wallet cards for new technicians from their course. They may do this by

## Course Admin/Lead Instr

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selecting the PRINT WALLET CARDS action item from the course profile and following the prompts. Providing wallet cards to the students is optional.

*Returning IC Paperwork and Unused Materials*

**Please do not return the unused student workbooks.** Keep them for future courses. When you register a new course, subtract the number of manuals you have left from the total number of seats and request that number of manuals. EXAMPLE: If you have 5 manuals left from a previous course and you are adding a course with 15 seats, request only 10 manuals when you set up the course online (Add A Course).

Return any Instructor Candidate evaluations (the mentor, IC and LI should each keep a copy) to the New York office by fax (917) 305-9876.

**PLEASE NOTE:** IC Evaluations must be faxed within five business days of course completion.

### Score Reports

A final course roster with each student's official scores may be viewed online by the Lead Instructor or course administrator. The course roster is updated with students' practical and exam scores as they are entered by the Lead Instructor.

## Course Admin/Lead Instr

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### Course Administration: Appeals

Any Lead Instructor (LI) may submit a written appeal to waive the 2-instructor minimum requirement. Please note this requirement is for a richer course experience for the students and is not a reflection on the skill of any Certified Instructor.

Documentation must include:

1. Written confirmation from the State CPS Training contact that they approve the LI offering a course(s) without another Certified Instructor
2. A brief explanation of how the LI has reached out to other instructors for assistance
3. The name of at least one Technician Assistant who will be helping out with the course behind the scenes (no teaching)
4. Agreement the course will be limited to no more than five students
5. The number of courses requested (time limit of 1 year)

In addition, the appeal should include information on how the LI will help techs serve their communities once they are nationally CPS certified.

All complaints and appeals must include clear supporting documentation and be postmarked/emailed at least 90 days in advance of the requested course start date.

Please complete and use the appeals form, available in Resources->Forms as a cover sheet for your submission.

Safe Kids will investigate and respond in writing to all complaints and appeals in as timely a manner as possible.

As appropriate, the National Child Passenger Safety Board and state CPS training contact will be consulted. Should this be the case, no identifying information will be provided to any member of the board or the CPS community.

All decisions by Safe Kids are final and may not be brought up for another appeal.

# Instructor Candidacy

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## Instructor Candidacy: Overview Description

Instructor candidacy is a process eligible technicians may choose to complete in order to become instructors. While candidacy is not required for all technicians, it is required for those wishing to become certified instructors.

There are four basic steps for completing instructor candidacy:

1. Successfully meet all eligibility requirements
2. Pay instructor candidacy fee
3. Submit all required documentation for approval within six months of payment
4. Upon approval, successfully participate as an instructor candidate for a certification course within one year of candidacy approval

The application fee for instructor candidacy is \$75. Due to the nature of the candidacy process, this fee is refundable only in extreme, well-documented situations.

**PLEASE NOTE:** The designated state CPS Representative will be notified upon an individual's approval as an instructor candidate.

## Eligibility

Any currently certified technician who has been certified for a minimum of six months at the time of registration is eligible to apply for instructor candidacy. The action item PAY INSTRUCTOR CANDIDACY FEE will only appear in your Online Services profile if you are eligible to apply.

**PLEASE NOTE:** Once approved, you must maintain your technician certification throughout your candidacy period in order to remain an approved candidate. If necessary, you may be required to re-certify to maintain your candidacy status. If your technician certification expires at any time during your candidacy period, your candidacy will automatically be terminated.

## Failure to Qualify as a Certified Instructor

You will fail to qualify as a certified instructor if one of the following occurs:

1. You do not receive a passing score on the Instructor Candidate Evaluation during your 12-month candidacy period
2. Your technician certification expires during your candidacy period

If any of the above occurs, you must reapply for instructor candidacy. Due to the nature of the candidacy process, this fee is refundable only in extreme, well-documented situations.

**PLEASE NOTE:** You have an unlimited number of chances to participate in a certification course as an instructor candidate during your candidacy period. If you do not receive a passing score on the first try, you are free to try to find another course and instructor team to participate with.

# Instructor Candidacy

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## Instructor Candidacy: Application Process Registration

Registration (payment of IC fee) is the first of two steps of applying for candidacy.

All registration must be done online. However, you can pay either online with a credit/debit/check card or manually with a check, purchase order or money order.

Once you meet the eligibility requirements, click on the action item PAY INSTRUCTOR CANDIDACY FEE listed in your profile. Review the instructor candidacy policies and click the button to continue.

You now have the option to either continue and pay online with a credit/debit/check card, purchase order or e-voucher or print out a registration form to complete and submit with a check, purchase order that is not registered in the system (see Organization Management section), or money order. The mailing address, fax number and phone number for submitting registrations can be found on the registration form.

Once the registration has been processed and payment received, you will receive an e-mail notifying you to continue with step two of the application process, submitting required documentation.

## Required Documentation

Submitting the required documentation for review is the second step of the application process.

For this step, you must submit the following:

- The Required Documentation form
- Four testimonials (testifying to technical and teaching skill); CPSTI skills testimonial includes confirmation course assistant completion

### *Course Assistant Requirement*

It is preferred that the course assistantship experience be completed within the last year but 2 years is acceptable. Applicants must have participated as **course assistant** for at least one certification course. This means, he/she participated in the planning meeting, setting up the classroom, classroom and outdoor exercises, and otherwise observed all aspects of the course, including various teaching styles. **CPST never lectures, grades or signs off skills tests.**

It is requested that the required documentation be submitted at one time. The mailing address, fax number and phone number for submitting instructor candidacy documentation can be found on the required documentation form.

Incomplete documentation cannot be processed, and Safe Kids will contact the candidate for supplemental documentation.

### *Required Documentation Form*

The Required Documentation form is available in Resources-> Forms. Be sure to complete all sections and include all of the required attachments with your submission.

# Instructor Candidacy

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## *Letters of Recommendation/Testimonials of Recommendation*

The following signed forms are required in place of the letters of recommendation:

- Two testimonials for Classroom Teaching (Adult)
- One testimonial for CPS Skill and Course Assistant Completion by a CPSTI
- One testimonial for CPS Skill by CPST/CPSTI

## *Application Deadlines*

Safe Kids must receive all required documentation at least six weeks before the registered course that you wish to participate in as an instructor candidate, and no more than six months after you register and pay for your candidacy.

This deadline refers to the date when ALL required documentation is received by Safe Kids, including any supplemental documentation that may be required. It does not apply to the date of registration nor, in the case of supplemental documentation requests, the date the original documentation packet was received.

**PLEASE NOTE:** Failure to submit the original documentation packet within six months of the date of registration will result in automatic denial of candidacy and forfeiture of the registration fee. If you still wish to become a certified instructor, you will be required to repeat the entire candidacy process, including registration and payment.

# Instructor Candidacy

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## **Instructor Candidacy: Before the Course Instructor Materials**

### *Materials List*

Each new instructor candidate will receive a copy of all instructor materials for the Certification course, including:

- Instructor manual
- Instructor CD-ROM, including presentation slides, video clips and other materials
- IC-mentor worksheet (also available under FORMS: Instructor Candidacy)
- Instructor candidate evaluation (also available under FORMS: Instructor Candidacy)

### *Shipment Times*

Materials are generally shipped within three business days of candidacy approval via FedEx. Because approval must occur at least six weeks before participating in any course, this should give all instructor candidates ample time to review and prepare prior to the course.

## **Participating in a Course**

If you haven't already done so, you must find a course to participate in as an instructor candidate. Talk to instructors in your area about participating in an upcoming course to fulfill this candidacy requirement.

It is the responsibility of the certified instructor or course administrator setting up a course to include you in the instructor team and designate a mentor instructor.

**PLEASE NOTE:** An instructor candidacy applicant must be officially listed on the instructor team as an instructor candidate for a specific course prior to teaching during that course. Failure to do so can prohibit the evaluation from being accepted for the instructor candidate AND jeopardize the validity of the certification for ALL STUDENTS participating in that course.

# Instructor Candidacy

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## **Instructor Candidacy: During the Course Instructing During a Course**

It is the shared responsibility of the Lead Instructor, the mentor instructor and the instructor candidate to be sure the assignments are met. Any assignments for the IC are to be monitored and evaluated by the mentor(s). The assignments should include as many aspects of the course as possible (teaching, set up, testing, etc.).

For skills assessments, an instructor candidate may sign off/grade students under the supervision of their mentor using their T#. Their mentor will sign behind the IC.

As of April 1, 2007, the instructor candidate must complete and submit the IC-mentor worksheet to their mentor for discussion prior to the course. This form is provided with the manual and is also available under FORMS: Instructor Candidacy.

Instructor candidacy teaching recommendations:

- Must attend the entire course, including any pre- or post-course instructor meetings
- Lecture for at least five hours, divided among at least three modules
- Set up a hands-on exercise (classroom or vehicle)
- Be the lead for a different hands-on exercise
- Participate in the community seat checkup event

The instructor team has a responsibility to provide feedback, through the assigned mentor, on a daily basis.

## **Mentor Instructors**

Each instructor candidate must have a designated instructor to serve as their primary mentor during the course. This person will be the primary point of contact for any questions or concerns about the candidate's evaluation and is responsible for daily reviews with the candidate.

In order to ensure the integrity of the evaluation process, the National CPS Board has determined the following standard should be followed when selecting Instructor Candidate Mentors:

- An instructor candidate should not be evaluated by anyone with a familial relationship. This includes siblings, offspring, spouses, etc.
- Professional affiliations that would be inappropriate include a mentor evaluating his/her supervisor or anyone who could unfairly influence the evaluation.
- Where these situations exist, the Instructor Mentor must excuse himself or herself from the evaluation process and another potential mentor with no potential bias be selected.

# Instructor Candidacy

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## *Teaching as a Mentoring Instructor*

While not required, please keep the following recommendations in mind when serving as a mentor instructor:

- You should teach as little as possible so you may devote your full attention to observing the candidate
- You should not act as the Lead Instructor and as a mentor for the same course, due to the number of responsibilities each role has within the instructor team

If the mentoring instructor must teach, be sure there are no scheduling conflicts so that he or she may observe the candidate at all times, including preparation for hands-on exercises.

## *Feedback*

The mentoring instructor should provide daily feedback to the candidate using the Instructor Candidate Evaluation, which is available in Resources->Forms.

The instructor team also has a responsibility to provide feedback, through the assigned mentor, on a daily basis. If the candidate needs improvement, use the course time to help him or her learn, providing clear and constructive criticism. At every point during the course, the candidate should have clear understanding of his or her progress and evaluation.

## **Instructor Candidacy: After the Course Evaluations**

The Lead Instructor is responsible for entering pass/fail designations for all instructor candidates during the online course finalization process.

Additionally, he or she must submit the completed Instructor Candidate Evaluation, available in Resources->Forms to PES by fax to 917-305-9876 following the course.

## **Notifications**

Upon successful completion of instructor candidacy, Safe Kids will mail official notification letters with a newly-issued instructor certification ID, and the Certification Renewal course instructor guide and course CD, within 20 business days after the course has been finalized. Instructor Candidates are approved as Certified Instructors to teach in the language of their IC course.

**PLEASE NOTE:** You have an unlimited number of chances to participate in a certification course as an instructor candidate during your candidacy period. If you do not receive a passing score on the first try, you are free to try to find another course and instructor team to participate with.

# Instructor Candidacy

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## **Instructor Candidacy: Challenges, Complaints and Appeals**

Although you may file a written complaint about an instructor, teaching environment, etc., Safe Kids will not accept appeals based on missed deadlines. The complaint should identify the problem area and provide specific details and background information to support the concerns.

All complaints and appeals must include clear supporting documentation and be postmarked within 90 days of the incident that is being addressed. Please complete and use the appeals form, available in Resources->Forms as a cover sheet for your submission.

Safe Kids will investigate and respond in writing to all complaints and appeals in as timely a manner as possible.

Appeals should include first-person examples, letters of support, and any other documentation. Any appeal is shared with the person challenged so they do see the name of the challenger and will have an opportunity to respond.

As appropriate, the National Child Passenger Safety Board and state CPS training contact will be consulted. Should this be the case, no identifying information will be provided to any member of the board or the CPS community.

**All decisions by SAFE KIDS are final and may not be brought up for another appeal.**

# Organization Management

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## Organization Management: Overview

### Description

The organization management functionality for the CPS certification program is primarily geared toward agencies that play a significant role in the procurement and maintenance of its affiliates' CPS certifications. Often times, there is one individual responsible for registering everyone within the agency for certification courses, is the contact person for purchase orders, or follows up with each individual in regards to re-certification and keeps everyone's certification up-to-date. Registering your organization and having your members designate themselves as an affiliate of the organization allows the organization manager to:

1. Better track affiliate certifications through access to their contact and certification information
2. Allow affiliates to use the organization's purchase orders and/or e-voucher to pay for all program fees, including re-certification.
3. Register affiliates for courses

### Roles

*Organization Manager:* This person will be responsible for registering the organization with Safe Kids and will serve as the primary contact between Safe Kids and the organization. He or she will also be responsible for managing the organization's purchase order(s) or e-voucher. Through the Web site, the organization manager will also be able to track affiliates' certifications, reschedule registrations and handle substitutions.

*Affiliate:* Members of your organization who allow the organization manager to view their contact and certification information. Affiliates will be able to pay all of their fees online with this organization's purchase orders or e-voucher (if these numbers are provided to them by the organization manager).

### Organization Registration

Any organization may register with Safe Kids. The registration is completely separate from any certification registration. Registering your organization and having your members designate themselves as an affiliate of the organization allows the organization manager to:

1. Track affiliate certifications through access to their contact and certification information
2. Allow affiliates to use the organization's purchase orders and/or e-voucher to pay for all program fees, such as re-certification.
3. Register affiliates for courses

Each organization can have only one point person, responsible for e-vouchers, adding POs, reviewing purchases, and paying the invoice.

To register your organization, go to [www.safekids.org/certification](http://www.safekids.org/certification) and select ONLINE SERVICES. When the screen opens, select ORGANIZATION MANAGEMENT.

PLEASE NOTE: The background color will be peach when you are in the organization management system.

# Organization Management

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## Organization Management: Affiliate Management Affiliating an Individual

There are two different methods to affiliate an individual with an organization.

*For individuals already in the Safe Kids system* (e.g. those currently certified, those with expired certifications), they must log in, click on UPDATE AFFILIATE ORGANIZATION, and add the organization. They will search for the organization by name.

Because some individuals work for one agency and are sponsored by another, there are two spaces for affiliation to an organization. As affiliates, they will then be able to use that organization's POs and e-vouchers, once the organizational manager gives them the appropriate PO or e-voucher number.

**PLEASE NOTE:** Be sure the AFFILIATE IDs are filled-in correctly, else you will not be able to use that organization's PO or e-voucher. The name of the agency appears next to the organization ID number.

*For people completely new to the CPS certification system*, the organization manager can add affiliates through the VIEW/ADD AFFILIATES action item listed in the organization management section. This function is only for adding people that **have never been CPS certified and are not currently in the Safe Kids system**. The other option is for the individual to register themselves in the certification system, click on UPDATE AFFILIATE ORGANIZATION, and add the organization.

**PLEASE NOTE:** The organization manager will have access to the individual's contact and certification information.

# Organization Management

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## Registering Affiliates for Courses

Organization managers are able to register any affiliate for certification and renewal courses.

The organization manager must know the course ID prior to logging in. Use the FIND A COURSE search engine, if needed.

To register affiliates for courses, log into the organization management section of the Web site and select REGISTER INDIVIDUALS FOR COURSES. Enter the course ID, select which payment option will be used (purchase order or E-voucher) and enter the appropriate number.

Select the individuals by checking the register box. Click on the REGISTER SELECTED INDIVIDUALS FOR COURSES.

*Public Courses:* To confirm, click on VIEW AFFILIATE REGISTRATIONS at the confirmation screen. The P.O. or e-voucher will be charged immediately and will appear on the appropriate statement. If there are not enough funds on the P.O. or e-voucher or any related issues, the registrations will not be processed. Please note the reason for the denial and make the necessary adjustments.

*Controlled Courses:* As with individual registrations, instructor approval is required before registration may be completed. Initially, you will only be making a reservation request for each of the individuals you'd like to register. **The account will not be charged, nor the space reserved until it has been approved by the Lead Instructor.**

Once approved, the organization manager will see "reservation approved" on the confirmation page. Check PO or EV and the appropriate number for the option to register. The PO or EV will be charged immediately and will appear on the appropriate statement.

**PLEASE NOTE:** The affiliate, not the organization manager, will receive an e-mail either approving or denying the reservation request for a controlled course, so VIEW RESERVATION STATUS often.

## Substitution, rescheduling, cancellation

An organization manager may use the online system to process substitutions, cancellations, or reschedule the registrations of their affiliates.

To process a substitution, reschedule a registration or to cancel a registration, log in and select the CANCEL/RESCHEDULE/SUBSTITUTE REGISTRATION action item. Select VIEW REGISTRATIONS for the affiliate. Select VIEW DETAILS of the appropriate course registration. Select the appropriate action item and follow the instructions.

**PLEASE NOTE:** You will need the SKID of the person who you would like to substitute.

**PLEASE NOTE:** Substitutes do not need to be affiliated to the organization. If a non-affiliate is substituted, the organization manager **will not** have access to their profile or be able to access his or her information in any way. It is recommended that they contact the substituted person and have them add the organization as an affiliate.

# Organization Management

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## Organization Management: Purchase Orders Adding a Purchase Order

To add a new purchase order, log in and select ADD A NEW PURCHASE ORDER from the action items at the bottom of the screen. Enter the purchase order information and select SUBMIT. Go back to the Main Menu.

Once a PO is added to the system, the organization manager will be able to register affiliates for courses charging against that PO. He or she may also provide the PO number to the organization's affiliates, who can then use it to pay for course registration, re-certification or instructor candidacy online. The system will automatically check for availability of funds.

If your organization will regularly be paying for course registrations or re-certifications, an e-voucher may be a more appropriate option.

Any open PO may be closed and billed after 90 days.

**PLEASE NOTE:** At this time, the organization manager will not receive an e-mail notification when there is activity on the PO. Please check the action item LIST ALL PURCHASE ORDERS and review activity on the POs regularly.

## Use by Affiliates

In order to pay any program fees with an organization's PO or e-voucher number, you must be an affiliate of the organization (the organization's ID must be listed under AFFILIATE or SPONSOR ID).

You can get the PO number from the organization manager for your affiliated agency. You can use it to pay for course registration, re-certification or instructor candidacy.

## Statements

Once a purchase order is closed (\$0 balance) an invoice will be sent. A Second Notice invoice will be mailed for any invoices that are not paid within 60 days. A Final Notice invoice will be sent for any invoice that remains unpaid 30 days following the Second Notice.

Track the use of the purchase orders regularly by logging in and selecting LIST ALL PURCHASE ORDERS from the action items at the bottom of the screen. Select SHOW DETAIL for each purchase order.

At this time there will be no email notification when there is activity on your account. Please review your purchase orders regularly.

# Organization Management

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## Organization Management: E-vouchers Requesting an E-voucher

An e-voucher is a line of credit with Safe Kids specifically for the CPS certification program. It is designed for organizations that will regularly be paying for course registrations or re-certifications.

To apply for an e-voucher, log in and select APPLY FOR AN E-VOUCHER / REQUEST ADDITIONAL E-VOUCHER CREDIT LIMIT from the action items at the bottom of the screen. Enter the information as requested and select SUBMIT. Confirm information and click on SUBMIT again. You will be notified via email of the e-voucher approval or denial.

Once approved, your organization's e-voucher information will appear in the organization profile and can be used to register affiliates for courses.

Provide the EV number to your affiliates (must be on affiliate list) and they will be able to use it to pay for course registration, re-certification or instructor candidacy.

**PLEASE NOTE:** At this time, the organization manager will not receive an e-mail notification when there is activity on the e-voucher. Please check the action item VIEW E-VOUCHER STATEMENT regularly.

## Use by Affiliates

In order to pay any program fees with an organization's PO or e-voucher number, you must be an affiliate of the organization (the organization's ID must be listed under AFFILIATE or SPONSOR ID).

You can get the EV number from the organization manager for your affiliated agency. You can use it to pay for course registration, re-certification or instructor candidacy.

## Statements

E-vouchers will be billed monthly.

Track the use of the e-voucher regularly by logging in and selecting VIEW E-VOUCHER STATEMENT from the action items at the bottom of the screen.

At this time there will be no e-mail notification when there is activity on your account. Please review your e-voucher activity regularly.