



CRICOS Guide

Updated 7 May 2021

Support Number: (08) 9511 1040

Our support line is staffed from 7am - 4pm WST Perth Time

Support E-mail: support@powerprorto.com.au

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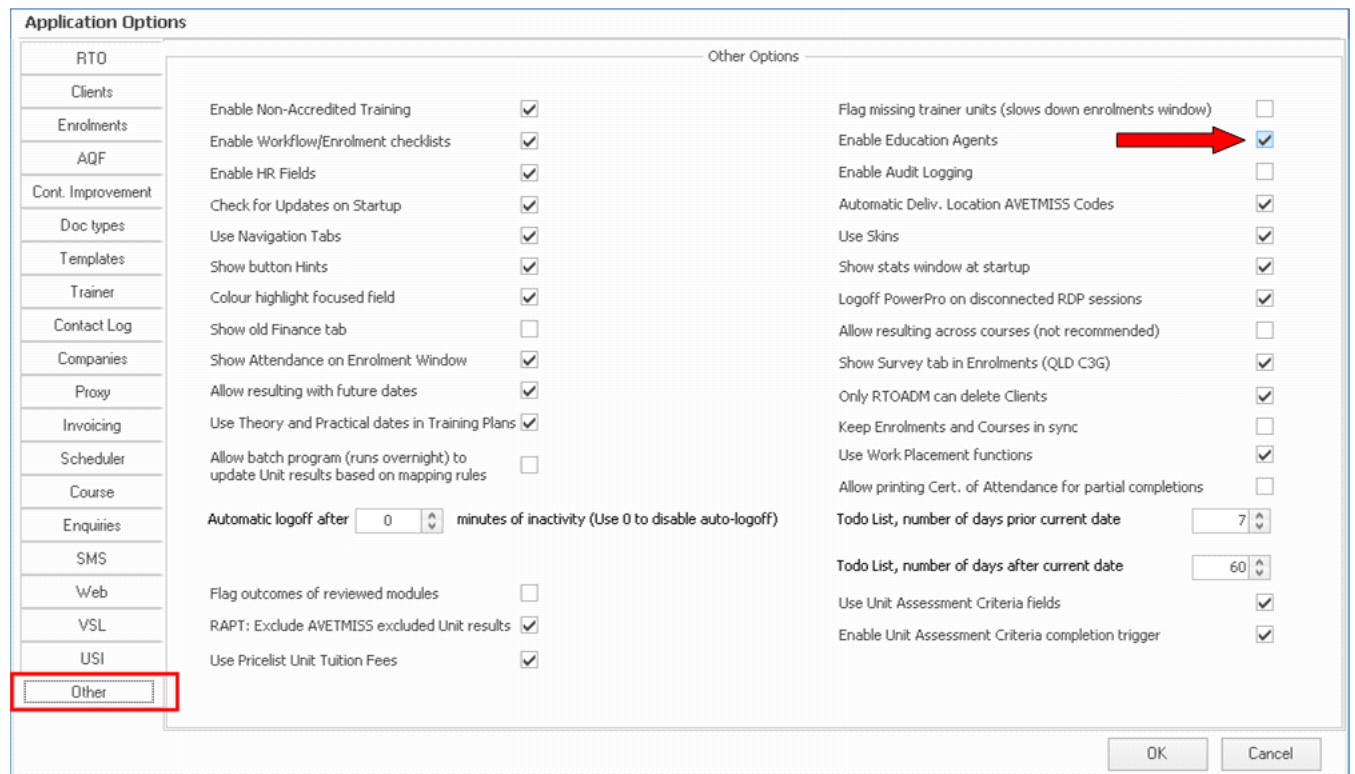
CRICOS in PowerPro RTO

As a Student Management System, PowerPro RTO supports the following CRICOS functionality:

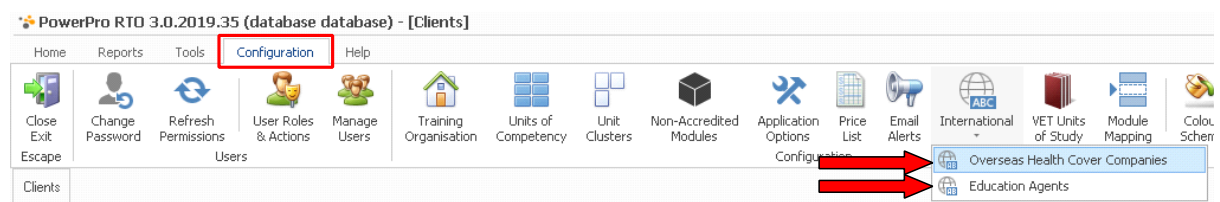
- Tracking of International documents details (Passport, VISA and Overseas Health Cover)
- Tracking of Emergency contact details (local and International)
- Tracking COE details
- Tracking of Education Agents
- Tracking and reporting Student Attendance
- Tracking all communication with the Student
- Printing Customised documents

Configuration

Use Configuration>Application options to enable Education Agents (if you intend to use that functionality). You may need to log out and back on to PowerPro to have the Education Agent actions visible and enabled.



- Use Configuration>International to configure Overseas Health Cover Companies as well as Education Agents:



Tracking of International documents details (Passport, VISA and Overseas Health Cover)

Use the International tab of the Clients window to record this information:

Clients												
Client status	Surname, Given names			Code/ID/USI	Secondary ID	Company/Organisation						
All Clients				68559		<UNSPECIFIED>						
Code	Surname	Given Names	Preferred Name	USI	Secondary ID	Date of Birth	Mobile	Email	Company/Organisation	Division	Department	Location
68559	MARTINEZ	LOLA	LOLA	A1PBRP		4/01/196	0442821	A1PBRPxA6SIF	VICOTEK			

Save	Cancel											Delete client	
Main	International				Overseas Health Cover				Emergency Contacts				
Other contacts	International Student	Nationality		Country of Passport		Insurance Company	Insurance Type		Local Contact		Relationship		
AVETMISS	<input checked="" type="checkbox"/>	Spain		Spain		ALL SAFE	S		Jenny Thompson		Cousin		
Licences	Passport No	Passport Expiry date		Visa No		Card/Policy No	Date Issued		Local Phone		Local Email		
Custom	995688	26/06/2020		326565986		53299-19	01/01/2019		08 99665544		jtom@hotmail.com		
Courses	Visa Expiry date	Education Agent		Date Paid		Expires On		Overseas Contact		Overseas Relationship		Overseas Phone	
Outcomes achieved	27/12/2019	AGENT 1				24/01/2020		Joana Martinez		Mother		34 8855 6698	
AQF Docs printed													
HR													
Invoices													
Contact Log													
Documents													
International													

Tracking COE details and Education Agents

CoE details are attached to each enrolment. To view/Edit these details use the International tab of the Enrolments window. Note that this area also allows specifying an Education Agent along with any fees commission agreed on.

Enrolments and Results

Filter Course Status: Active Courses | ID/Nat Code/Title: PDF | Group/Version: | Surname, Given Names: | State/Territory: <All States> | Course Date: | Refresh | Clear | Today

Course ID	National Code	Qualification Level	Program name	Group/Version	Start Date	End Date	Location	Trainer(s)
C005919	PLS ADJUST	Course	Address adult language, literacy and numeracy	HWZPDFEQGN	23/01/2016	09/09/2016	ASHDALE SECONDARY C	
C005950	AUR21612	Course	Automotive	CTQJRLBMHKIUMPBTMZN5RQM	10/09/2015	24/07/2016	APOLLO BAY P-12 COLLE	
C007440	AUR21612	Certificate II	Automotive	TEST PDF	15/01/2018	05/03/2019	Perth	NEIL SO WYNTON MARSALIS
C007509	S51	Skill Set	Paramedics	PDF TESTING	28/05/2019	07/07/2019	DEFAULT LOCATION	BOBY MINION KEVIN MINION

Enrolments against this Course

Book	Client Name	USI	Company	Withdrawn	Completed	W/R
✓	GONZALEZ, SPEEDY ()	▶	CORPORATE INTE			N/A
✓	DINO, SHARON ()	▶	THE YELLOW TUN		04/12/2017	N/A
✓	BANKS, TRUDY ()	▶	VIDATEK			N/A
?	COSTA, GILLETTE ()	▶	VIDATEK			N/A
✓	FENZ, JAMES ()	▶	VIDATEK			N/A
?	SMITH, SYLVIA ()	▶	ENERJ			N/A
✓	MARTINEZ, LOLA	▶	VICOTEK			N/A

Course data

- Outcomes & Dates
- Workflow
- Units of Study
- VSL
- Attendance
- AVETMISS
- RAPT
- Invoices
- Contact Log
- Documents
- Work Placement
- International**

CRICOS

CoE Code: A12569724


CoE Start: 03/06/2019

CoE End: 17/12/2019

Education Agent

Education Agent: AGENT 1

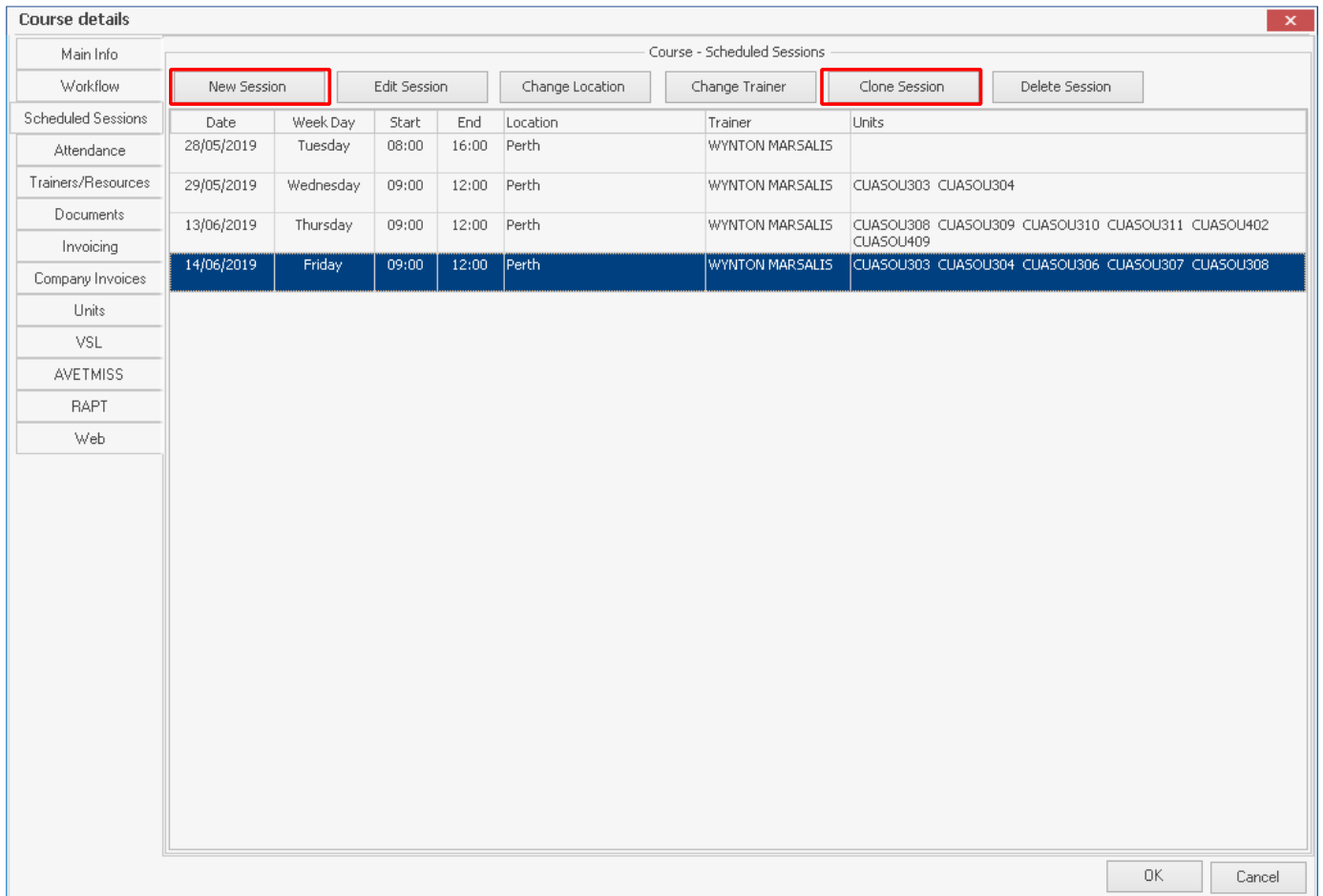
Commission: 12.00 %



Tracking and reporting Student Attendance

Course Sessions

In order to track Student Attendance, Courses must contain Training Sessions. Each session has a time duration against which the attendance of each Student is recorded. To create Training Sessions users should use the Course>Scheduled Sessions area:



Course details		Course - Scheduled Sessions						
Main Info								
Workflow	New Session	Edit Session	Change Location	Change Trainer	Clone Session	Delete Session		
Scheduled Sessions	Date	Week Day	Start	End	Location	Trainer	Units	
Attendance	28/05/2019	Tuesday	08:00	16:00	Perth	WYNTON MARSALIS		
Trainers/Resources	29/05/2019	Wednesday	09:00	12:00	Perth	WYNTON MARSALIS	CUASOU303 CUASOU304	
Documents	13/06/2019	Thursday	09:00	12:00	Perth	WYNTON MARSALIS	CUASOU308 CUASOU309 CUASOU310 CUASOU311 CUASOU402 CUASOU409	
Invoicing	14/06/2019	Friday	09:00	12:00	Perth	WYNTON MARSALIS	CUASOU303 CUASOU304 CUASOU306 CUASOU307 CUASOU308	
Company Invoices								
Units								
VSL								
AVETMISS								
RAPT								
Web								

Use the *Create Session* button to create the first Training session. If there is a date pattern (such as “every Monday, Wednesday and Friday”) the *Clone Session* function works as a session factory and can save significant data entry time.

For more information on setting up sessions- please click [HERE](#) to view the Trainers Scheduler Guide

Recording attendance

To record attendance, use the Enrolments window and:

- Right click on the Course/Group
- Click on Attendance by Session as per image below:

The screenshot shows the 'Enrolments and Results' window in PowerPro RTO 3.0.2019.35. The window has a menu bar with 'Home', 'Reports', 'Tools', 'Configuration', and 'Help'. Below the menu bar is a toolbar with icons for 'Close Exit', 'Clients', 'Enrolments and Results', 'Enquiries', 'To-do List', 'Accredited Courses', 'Non Accredited Courses', 'Training Plans', 'Client Companies', and 'Trainers Assessors'. The 'Enrolments and Results' section is active, showing a table with columns: 'Filter Course Status', 'ID/Nat Code/Title', 'Group/Version', 'Surname, Given Names', and 'State/'. The table contains one row: 'C007504', 'CUA30915', 'Certificate III', 'Music Industry', and 'ATTENDANC'. A context menu is open over the row, with options: 'Edit Course details', 'Print Roll...', 'Print Course Sessions', 'Print Session Plans', 'Print Session based Roll...', 'Attendance by Session...', 'Attendance Summary...', and 'Course/Qual Alignment...'. The 'Attendance by Session...' option is highlighted. Below the table is a section 'Enrolments against this Course' with buttons for 'New Enrolment', 'Edit Enrolment', 'Modify Units', 'Client Details', and 'All Client Details'. At the bottom, there is a table with columns: 'Book', 'Client Name', 'USI', 'Company', and 'Withdrawn'.

And the Attendance by Session window will show. See next page.

Course Attendance Records

Course ID: C007504

Course Name: CUA30915 - Certificate III in Music Industry

Version: ATTENDANCE UACS WEB T

Session List

Client List

Session Date	Week Day	Start Time	Duration	Units	Client Name	Attended	Abs. Reason	SET
28 May 2019	Tuesday	08:00 AM	08:00		AABTURSJKHDLMFU, YUQL	00:00		▼ ✓
29 May 2019	Wednesday	09:00 AM	03:00	CUASOU303, CUASOU304	ABDILLA, JESSICA JANE	00:00		▼ ✓
13 Jun 2019	Thursday	09:00 AM	03:00	CUASOU308, CUASOU309, CUASOU310, CUASOU306, CUASOU307	FONSECA, JOANNA	00:00		▼ ✓
14 Jun 2019	Friday	09:00 AM	03:00	CUASOU303, CUASOU304, CUASOU306, CUASOU307	GILLIAN, TESTER	00:00		▼ ✓
					PNNCSFCGJG, TOMEDY	00:00		▼ ✓

1 - Select the Training Session

2 - Tick the Clients that attended

4 - Hit Apply to save

Sessions: 4

17 h

Clients in this Session: 5

Attach Client

Detach Client

Contact Log

Select All

Select None

List Pending and Cancelled bookings

Set Attendance Time to: 03:00

Apply

3 - Adjust the attended time if required

Close

Checking group attendance

A quick way to check attendance for a group is to use the Enrolment>(Right click on the Course)
Attendance Summary:

Attendance Summary ✕

Course ID: Course Name:

Version/Group:

Show Cancelled/Pending Enrolments Show Withdrawn Enrolments

Client Code	Secondary ID	Client Name	Attendance to Date
00099487	BTPPH2L	AABTURSJQHDLMFU, YUQLAMEUJFVJ	100.00 %
20132548	PIT250	ABDILLA, JESSICA JANE	82.35 %
201905217		FONSECA, JOANNA	70.59 %
20132865		GILLIAN, TESTER	82.35 %
00095942	X8M;G	PNNCSFCGJG, TOMEDY	100.00 %

5 Enrolments

Legend Print Close

Any attendance under 80% shows in red. Use the Legend button to see the different colour coding thresholds.

Checking Individual attendance

The Enrolments window displays the attendance details for the highlighted student:

Session Dat	Week Day	Start time	Finish Time	Duration	Attended	Percent	Abs. Reason
28/05/2019	Tuesday	8:00:00 AM	4:00:00 PM	08:00	08:00	100 %	
29/05/2019	Wednesday	9:00:00 AM	12:00:00 PM	03:00	03:00	100 %	
13/06/2019	Thursday	9:00:00 AM	12:00:00 PM	03:00	01:00	33 %	
14/06/2019	Friday	9:00:00 AM	12:00:00 PM	03:00	00:00	0 %	

Attendance to Date 70.59 %

Double clicking on the above table allows users to adjust the attendance for this specific Student on a particular session:

Edit Attendance Record ?

Attendance Record

Course: 7504 Certificate III Music Industry

Client: FONSECA, JOANNA

Session Date: 13 Jun 2019 Thursday

Start/End Time: 09:00 12:00

Duration: 03:00

Attended: 01:00

Abs. Reason: [Dropdown]

OK Cancel

Printing Student attendance

A built-in report called "Attendance Records" (Reports>Client>Attendance Records) provides a full snapshot of the Student attendance for a specific Course. Being a built-in report it can easily be exported as a PDF document and emailed out.

Client Attendance Report

Zootopia

Course: CUA30915 Music Industry

Course ID: C007504 **Version/Group:** ATTENDANCE UACS WEB TRAINER II

Attendance as of: 19 Jun 2019 at 8:00 AM

Client Name: FONSECA, JOANNA

Client Code: 201905217

Secondary ID:

Client DOB: 12 Jun 2000

Session Date	Week Day	Start Time	Finish Time	Duration	Attended	Percentage	Unit(s) of Competency
28 May 2019	Tuesday	08:00	16:00	08:00	08:00	100.00 %	
29 May 2019	Wednesday	09:00	12:00	03:00	03:00	100.00 %	CUASOU303 CUASOU304
13 Jun 2019	Thursday	09:00	12:00	03:00	01:00	33.33 %	CUASOU308 CUASOU309 CUASOU310 CUASOU311 CUASOU402 CUASOU409
14 Jun 2019	Friday	09:00	12:00	03:00	00:00	0.00 %	CUASOU303 CUASOU304 CUASOU306 CUASOU307 CUASOU308
Totals for FONSECA, JOANNA				17:00	12:00	70.59 %	

Printing Student attendance letters

Using the Mail Merge Clients function (Enrolments>Right click on Group or on Client>Mail Merge Clients) it is easy to create merged letters containing information about the Student attendance to date including all contextual fields such as Program name, national code, expected end date:

Status	Client Name	Company/Organisation	Expected Start	Completed	Merge
✓	AABTURSJQHDLMFU, YUQLAMEUJJPVJ	PYMBLE LADIES COLLEGE			<input type="checkbox"/>
✓	ABDILLA, JESSICA JANE	<UNSPECIFIED>			<input type="checkbox"/>
✓	FONSECA, JOANNA	<UNSPECIFIED>			<input checked="" type="checkbox"/>
✓	GILLIAN, TESTER	<UNSPECIFIED>			<input type="checkbox"/>
✓	PNNCSFCGJG, TOMEDY	REDEEMER BAPTIST SCHOOL			<input type="checkbox"/>

Document/Letter

- 1 day Roll with Client units.docx
- AttendanceLetter.docx
- cancellation.docx
- Company Letter .docx
- confirmation with AVETMISS fields.docx
- confirmation.docx
- Course Outline.docx
- Course Progress WITH PHOTO.docx
- Course Progress.docx
- Labels L7163.docx
- Participant list with results.docx
- PaymentPlan.docx
- USI Notification.docx
- Widatek Certificate of Attendance.docx

The Mail Merge window (above) is used widely in PowerPro. It allows merging documents (called Templates in PowerPro) with data from the PowerPro Database. In this case we are using it to generate Attendance letters.

Use the Log options to create a Contact Log on this Mail Merge and possibly the Attach options to keep a copy of the merged document against the Student.



Joanna Fonseca

Geraldton
6030 - WA

Date: 19 June 2019

Re: Music Industry

Dear Joanna,

This letter is to notify your about your class attendance on the following Course:

Course: Certificate III in Music Industry
Nat. Code: CUA30915
Start Date: 28/05/2019
End Date: 22/12/2019
Address: 65 St Georges Terrace
Perth
6000 WA

Attendance to date: 70.59 %

Image above: Simplified example of a merged Attendance letter.

Tracking communication with the Student

The Contact log area is a collection of events recorded against a Student enrolment. A Contact Log can be a copy of an email message, a phone conversation, an absentee note, a student complaint, a suggestion, etc. The list of Contact Log types is configurable in Configuration>Application options>Contact Log.

The screenshot displays the PowerPro RTO 3.0.2019.36 (database database) - [Enrolments and Results] interface. The top navigation bar includes Home, Reports, Tools, Configuration, and Help. Below this is a filter section for Course Status, ID/Nat Code/Title, Group/Version, Surname, Given Names, State/Territory, and Course Date. A table lists enrolments with columns for Course ID, National Code, Qualification Level, Program name, Group/Version, Start Date, End Date, Location, Trainer(s), Course Type, Seats left, AVETMISS, RAPT, Web, and Status. The bottom section shows 'Enrolments against this Course' with a table of client details and a 'New Contact' button highlighted in pink. A yellow box highlights the 'Contact Log' section, showing two contact log entries with details like Contact Date, User/Trainer, Contact Type, and Follow up instructions.

Image above: Contact logs showing for Joanna's enrolment in the Cert III in Music

Use the New Contact button to enter a new Contact Log. Double click on an existing Contact Log to view or edit its details:

Contact Log

Contact Log entry

Client Name: FONSECA, JOANNA

Course: Certificate III - Music Industry

Contact Date: 19/06/2019

Contact Type: Trainer Contact

User/Trainer: Cli

Follow up: 25/06/2019

Status: Open

Priority flag: Warning

Description: Joanna needs to work further on music reading in preparation for assessment 2. I will check her again next week.
Cil Evans
Music trainer

User notes: Follow up next week

Notify Trainer: <Do not notify anyone>

OK Cancel

Some actions such as Email Client, SMS Client and Mail Merge client can “automatically” add a Contact Log to the Student enrolment.

Reporting on Contact Logs

Contact Logs are listed against the Enrolment as well as in the actual Student record (“Clients” window). The Contact Log report (Reports>Client>Client Contact Log) can be used to print a list of all contacts recorded against a Student:

The screenshot displays the PowerPro RTO 3.0.2019.36 (database database) interface. The top navigation bar includes Home, Reports, Tools, Configuration, and Help. The Reports menu is open, showing a list of report options. The 'Contact Log' report is highlighted, with a tooltip indicating it 'Lists Contacts with Clients between chosen dates'. In the background, a line chart is visible with a y-axis ranging from 4 to 14 and a single orange line forming a triangle with a peak at 12. The 'Enrolme' section is partially visible on the right side of the interface.

Contact Log Report

Zootopia

Contact Types: <No Filter - All Contact Types> Date window: No Filter - All dates
Company Filter: <No Filter - All Companies> Client Filter: FONSECA, JOANNA
Course Filter: <No Filter - All Courses>

Client Name: JOANNA FONSECA Client ID: 201905217 DOB: 12 Jun 2000

Course: Certificate III - Music Industry (ATTENDANCE UACS WEB TRAINER II)

Contact Date: 14 Jun 2019 Contact Type: Email Sent

User/trainer: Cil Evans Follow Up:

Important

Description: Subject: Assessment due

Hi Joanna,

just a quick email to remind you there is an assessment overdue for your Music Industry course.

Your unit progress in this course is 0 of 15.

Please do not hesitate to contact us for any clarification.

Regards,
Cil Evans

User Notes:

Client Name: JOANNA FONSECA Client ID: 201905217 DOB: 12 Jun 2000

Course: Certificate III - Music Industry (ATTENDANCE UACS WEB TRAINER II)

Contact Date: 19 Jun 2019 Contact Type: Trainer Contact

User/trainer: Cil Follow Up: 25/06/2019

Warning

Description: Joanna needs to work further on music reading in preparation for assessment 2.
I will check her again next week.

Cil Evans
Music trainer

User Notes: Follow up next week

Total records: 2

Break down:

1 Email Sent

1 Trainer Contact

Image above: the Contact Log report

Printing customised documents

As described in [Printing Student attendance letters](#) PowerPro can be used to generate any type of document by drawing information from the database. This information can relate to a Course, a Student, a particular enrolment, a Unit, a delivery location, etc. To produce these documents the PowerPro administrator (part of the RTO staff) should maintain a set of templates (Word documents) and manipulate the available Merge fields to obtain the desired content and layout. These Word documents reside in the folder /directory specified in:

Configuration>Application Options>Templates>Letter:

Application Options		Directories/Folders
RTO	Office Suite	Microsoft Office
Clients	Certificate Templates	Z:\Shared Docs\Templates\Qualification
Enrolments	Record of Results Templates	Z:\Shared Docs\Templates\Transcript of Results
AQF	Statem. of Attain. Templates	Z:\Shared Docs\Templates\SOA
Cont. Improvement	CAN Letter Templates	Z:\Shared Docs\Templates\CAN Letters
Doc types	Cert. of Attendance Templates	Z:\Shared Docs\Templates\Cert of Attendance
Templates	Course Roll Templates	Z:\Shared Docs\Templates\Roll
Trainer	Unit based SOA Templates	Z:\Shared Docs\Templates\Unit based SOA
Contact Log	Training Plans Templates	Z:\Shared Docs\Templates\Training Plans
Companies	Invoice Templates	Z:\Shared Docs\Templates\Invoice
Proxy	Receipt Templates	Z:\Shared Docs\Templates\Receipts
Invoicing	Client Card Templates	Z:\Shared Docs\Templates\Client Card
Scheduler	QR Card Templates	Z:\Shared Docs\Templates\QR Card
Course	Letters	Z:\Shared Docs\Templates\Letter
Enquiries	Custom Reports folder	D:\Google Drive\Custom Reports
SMS		
Web		
VSL		
USI		
Other		

Find text:

Replace with:

Image above: The location of the different type of document template is specified in the Application Options window.

For information on how to adjust and create new templates please see the following article on our FAQ database: [Adjusting / Creating PowerPro document Templates](#)