# Blended Classes in BCRM

BCRM is the class management source for all student classes, including blended programs. The UMS (user management system) is the administrative side of the JA Learning Platform where blended programs are facilitated. Beginning in summer 2017, BCRM and the UMS will share information about blended programs. All class management and registration tasks, such as the class setup, educator and volunteer identification, and program assignment occurs in BCRM. BCRM will automatically send a request for a blended program class in the UMS.

Anything that is in UMS that is not available in BCRM, or is done by educators/volunteers (such as student names) is done in the UMS interface.

# Frequently Asked Questions

## *What happens in BCRM and the UMS?*

| BCRM Classes | UMS Classes |
|---|---|
| Add a Class for a "Blended" program – A new class is created with **Requested** class status and is sent to the UMS. If the request to the UMS is successful the UMS status will show *Pending*. The class name created in BCRM will be transferred to the UMS. | New Course Request – A request is created by BCRM for 1 session of the selected "Blended" program and a successful response is sent back to BCRM |
| In BCRM the UMS Status will be updated to *Approved* and BCRM will send all confirmed educators and volunteers to the UMS. | JA USA Approves Request – The session request is approved in the UMS and the status is updated to *Not Running* and sent to BCRM. |
| Add Volunteer/Educator – When the volunteer/educator is confirmed and added to BCRM, BCRM will send it to the UMS. When an educator and volunteer are both confirmed the BCRM class status will be **Matched**. | Enroll Volunteer/Educator – The new volunteer/educator will be enrolled in the class via BCRM |
| | Enroll Students – All students must be enrolled in the UMS. |
| In BCRM the UMS Status in BCRM will be updated to *Verified*, the student count will be updated with the count of students from the UMS, the end date will be updated to the UMS verification date and the verifying constituent will be updated to the UMS user that verified the class. When the end date is passed the class status will be **Complete**. | Verify Course – When the class is completed a volunteer or educator must Verify the class in the UMS. |
| Verify Class – The class status will be set to **Verified** when all other requirements have been met in BCRM. The sync will register the verified class with JA USA. | |

## *Does this new integration impact other Learning Platform courses?*

- No; this integration only impacts your JA blended programs (e.g. JA Company Program, JA Global Marketplace, etc.). All other training courses, communities, and Resources Courses still need to be requested through the UMS.

### *Where do I add my blended program class?*

- Add ALL your blended program classes into BCRM. BCRM will automatically forward information for blended classes to the UMS. The approval process in the UMS will follow UMS guidelines.
    - Example: Mrs. Jones, an educator at Lincoln Middle School, would like to run a standard blended program, JA It's My Future, and has been in contact with her local JA office. Marcia, a program manager at the JA office, opens BCRM and enters the new blended program class as she does all her other JA classes. Right away, the class request is sent to the UMS, and initiates the blended program approval process.

### *When does my class request get created in the UMS?*

- The class request will be created immediately. No Educators or Volunteers need to be confirmed before the request is made or approved.

### *Why can't I add the blended program class to the UMS?*

- Now that BCRM is the central location for class management, all new classes must first be created in BCRM before they can run in the UMS. Entering all classes in BCRM will be less confusing than trying to remember which classes should be entered in a different system, and whether or not the class has been set up. Although the existing reports in UMS will still be available, JA staff need only check one place to check to see if a class exists, and what the status of the class is in both systems.

    Also note, the UMS doesn't collect all the information that BCRM requires for class registration.

### *What happens if I am new to BCRM and already have blended classes in the UMS?*

- If you have already started registering your classes in another system (Raiser's Edge or Access), continue using that system, and the UMS system, throughout the remainder of the program year.
- If you already have classes in the UMS that have not been created in your legacy system please make sure to complete the class registration process with your Raiser's Edge or Access system and not with BCRM. Any classes entered in both the UMS and BCRM separately can create duplicate classes, please contact the help desk if this happens.

### *Will the class names in BCRM and UMS match?*

- Yes. When BCRM receives the approval from UMS, BCRM will send all the information about the class, including the class name, to the UMS. The UMS will automatically update accordingly.

### Where do I add/edit my educators and volunteers?

- Use BCRM to add or edit educators and volunteers. Each confirmed educator and volunteer will be added to the UMS after the class has been approved. Anyone added to BCRM after the class has been approved in the UMS, will appear in the UMS after their status is set to "Confirmed" in BCRM.

### Where are students added?

- Students should be added, or enrolled, to the class in the UMS. The UMS will provide the student count back to BCRM when the class is marked verified by the educator or volunteers. We highly recommend that JA Areas staff review the student count and update, if necessary, to the actual verified student count prior to the final verification tasks.

### My student count has changed since I set up the class in BCRM; what do I need to do?

- The UMS will provide the student count back to BCRM when the class is marked verified by the educator or volunteers in the UMS. We highly recommend that JA Areas staff review the student count and update, if necessary, to the actual verified student count prior to the final verification tasks.

### What happens when the class has been verified in the UMS?

- The UMS will send the latest student count and verification information to BCRM. The verification date and verified by user from the UMS will be saved in the end date and verifying constituent fields of the class in BCRM. In addition the UMS Status in BCRM will show the class was verified in the UMS. JA Area staff must complete all standard verification processes, such as reviewing for missing information, adjusting student demographics, and setting the class status to "Verified."

### How do I know that my class information has been transferred to the UMS?

- There is a new "UMS Status" field on the BCRM class record to help you track the progress of your blended program class.

### *What does the UMS Status field on the BCRM Class record mean?*

| BCRM Steps/Actions | UMS Steps/Actions | BCRM | | Description |
|---|---|---|---|---|
| | | UMS Status Field | Class Status | |
| Add a Class with a blended program | | Pending | Requested | Class created in BCRM<br>Course Request is created in the UMS; under <u>My Courses</u> in <u>Pending Courses</u> not yet approved/denied |
| | JA USA Approves requested class | Approved | Requested | Class is approved in the UMS; under <u>My Courses</u> in <u>Not Running Courses</u> |
| Add educator or set class commitment status to Confirmed | | Approved | Requested | Educator is confirmed in BCRM<br>Educator is enrolled in the UMS; in the class <u>Enroll Users</u> window under <u>Educator</u> under <u>My Courses</u> in <u>Not Running Courses</u> |
| Add volunteer or set class commitment status to Confirmed | | Approved | Matched | Volunteer is confirmed in BCRM<br>Volunteer is enrolled in the UMS: in the class <u>Enroll Users</u> window under <u>Volunteer</u> under <u>My Courses</u> in <u>Not Running Courses</u> |
| Edit class | | Approved | Requested or Matched | Class is updated in BCRM<br>Class name and start date is updated in the UMS; under <u>My Courses</u> in <u>Not Running Courses</u> |
| | Enroll Student | Approved | Matched | Students are enrolled in the UMS; under <u>My Courses</u> in <u>Not Running Courses</u> |
| | Start Class | Approved | Requested or Matched | Class is running in UMS; under <u>My Courses</u> in <u>Running Courses</u> |
| | Verify | Verified | Requested, Matched, or Complete | Class end date, students and verifying constituent are updated in BCRM<br>Class is completed in the UMS; under <u>My Courses</u> in <u>Completed Courses</u> |
| Verify class | | Verified | Verified | Class is verified in BCRM and sent to the class registration system |

| | | BCRM | | Description |
|---|---|---|---|---|
| BCRM Steps/Actions | UMS Steps/Actions | UMS Status Field | Class Status | |
| Exception returned for Add a Class with a blended program | | Send Failed | Requested | Communication between BCRM and the UMS is temporarily unavailable. No action required. -or- There is no linked constituent record for your log-in (required). Set up a link between your constituent record and user log-in. ***JA USA System Administrators will resend classes*** |
| | Deny | Denied | Requested | Class is denied in the UMS; under My Courses in Denied Courses |
| | Un-Start Class | Approved | Requested or Matched | Class is not running (paused) in the UMS; under My Courses in Not Running Courses |
| | Unverify | Unverified | Requested or Matched | Class is returned to running in the UMS; under My Courses in Running Courses |
| Delete Volunteer or remove Confirmed class commitment status | | Approved | Requested or Matched | Volunteer is removed from the class in BCRM Volunteer is removed from the class in the UMS; in the class Enroll Users window under Volunteer |
| Delete Educator or remove Confirmed class commitment status | | Approved | Requested or Matched | Educator is removed from the class in BCRM Educator is removed from the class in the UMS; in the class Enroll Users window under Educator |
| Change class status to Unfulfilled | | Denied or Unverified | Unfulfilled | Class is unfulfilled in BCRM |

*I've received an error that the BCRM data didn't send to the UMS. What do I need to do?*

- First, ensure that your log-in is linked to a BCRM constituent record. Only classes set up by staff who are properly configured in BCRM will be successfully accepted by the UMS.
- BCRM will check nightly for any classes that failed to send and notify the Help Desk so that any issues can be handled properly. If the problem continues for more than 24 hours, please contact the IT Help Desk for assistance.

***I've edited information on my BCRM record, but the information in the UMS doesn't reflect the changes. How do I update the UMS information?***

- If the class name, date, or delivery method has been edited on the BCRM class record and the changes have not been reflected in the UMS, open the class in BCRM, click 'Edit Class' and then "Save." This forces the information to be resent to UMS.

***The educators and volunteers are not included in my UMS class. How do I transfer the information from BCRM?***

- Educators and volunteers must have a "Confirmed" status in BCRM to transfer to the UMS.
- When a class is approved in UMS, JA Staff should check the Commitment status on the educator(s) and volunteer(s) on the class in BCRM.
- If the commitment status shows "Enrollment failed." change the commitment status for each educator and volunteer to "Confirmed." This should resend the educator(s)/volunteer(s) to UMS.
- If changing the commitment status does not correct the UMS information, contact the IT Help Desk for assistance.

***What should I name my BCRM class? Does the class name in BCRM become the class name in the UMS?***

- The class name in BCRM will transfer to, and become, the class name in the UMS. Remember that the UMS information is accessed by educators and volunteers, and JA Areas may wish to spell out the school name. Additional information, such as time period, is acceptable for blended programs class names. The program name is automatically added to the UMS class name.
- The BCRM class naming convention continues to be recommended as:
  [Educator last name]-[School Abbreviation]-[Semester abbreviation]-[2-digit year]
  (example Arrington-AHS-F15).

***Will my JA Area be billed for every blended program class set up in BCRM?***

- JA Areas should be aware that every staff member who can create classes in BCRM may create blended program classes. Staff members should use caution in setting up blended classes in BCRM as these classes are immediately sent to the UMS for approval. Once a blended course is approved in the UMS, JA Areas will be invoiced for the number of approved blended courses.

  To avoid erroneous billing, only enter blended program classes in BCRM when it is known that the class will occur.

***My class program has changed (from kit-based program to blended, or vice versa, or to a different program). What needs to be done?***

- Change the class status in the original BCRM class record to "Unfulfilled" and recreate the class with the correct program. This ensures the UMS and BCRM classes are properly synchronized.