How To- Schedule Students for Employers we will Invoice for Classes at our Training Site

We can help employers schedule their individual staff members for classes at our training sites and send them and invoice after the training is complete if their company prefers to be billed rather than paying with a credit card at the time of scheduling. We do this for both companies and schools we already have a relationship with and for new customers.

When employers send their employees to a class at our training site, the fee is the same as it would be for any other student attending class at our training site.

Use the steps below to schedule students for companies and schools that would like to be invoiced/billed for their employee's training.

Step 1: Find out if the Company has used us before or not for any prior training

If the company says they have used us in the past, search for them in CPR.Center and Outlook to confirm we have communicated with them. If so, we will already have their billing information. Confirm we have the correct
Company Contact
Company Contact Phone Number
Company Contact Email Address
This will need to be added later to the student block. After confirming, move onto Step 2.

If they are a new customer, or if you cannot find any information on them, collect the following information that you will later add to the student block:

Company Name we are Invoicing
Company Contact
Company Contact Phone Number
Company Contact Email Address
Company Billing Address

Step 2: Create a Student Block for the Employee in CPR.Center
Create a student block for the date and time they would like to send their employee to a class at our training site.

Enter these Student Block Details:
Enter the Employee Name
Enter Class Type

Enter Book details based on what the employer requests

*If it is ACLS or PALS ask if they want an eBook or physical book. If it is a physical book, ask where we need to ship the book.
**If we need to ship a book, send a separate email to our shipping department advising what book type(s) to ship, the address to ship it, the student's name and the date of the class.

***If the employer does NOT add a book to the order, ADD A NOTE to the free text notes section of the student block that says
"If the student does not bring the required book to class, please leave a note here for us so we know to invoice their employer for the book. Thank you!" (Your initials) (date)

Enter Employee Cell Phone
Enter Employee Email Address
Enter YES for card Insurance
For Profession Enter- Invoicing (company name) for Student
Payment Details- See Notes
Add Premade note - NO eCard Invoicing company
Add notes in the NOTES section- No eCard - Invoice (company name)
Add Notes in the NOTES section- Added By (your name) (date added)
Add the additional notes in the NOTES section of the student block-

Returning Customers-
Company Name we are Invoicing
Company Contact
Company Contact Phone Number
Company Contact Email Address

For New Customers-
Company Name we are Invoicing
Company Contact
Company Contact Phone Number
Company Contact Email Address
Company Billing Address

Step 3: ADD and INVOICE Note to CPR.Center for Billing Purposes

Add a Note to the date on the CPR.Center Calendar that says
INVOICE (company name) for (student name) your initials and date

Example: INVOICE Select Specialty Town and Country for Katie Smith 4-20-2022 KS

make the note GREEN

*This lets us know we need to send an invoice to the employer after the training is complete

Step 4: Update the Student Paid Attendance for the Class
After you have added the student to the class, update the number of Paid Students for that class in CPR.center and delete the old Paid student note

Step 5: Email the Employer and Employee their Class is Scheduled Confirmation Email.

*Note- If the Employer selected Online/Blended elearning with skills session, or a skills session only for their employee's training, **go to Step #7**

After adding the employee to the class their employer has requested, send a confirmation email to both employer and copy employee to verify we have scheduled their class

Email Subject Line: (Employee Name) is Scheduled for a (class type) class on (date of class) at (start time of class)
Example: Judy Henry is Scheduled for a BLS class on 4-20-2022 at 9:00am

Email Body: ACLS or PALS Classes
*Attach the ACLS or PALS pre-course instructions letter to the email when sending this confirmation email

Hello (Employer Contact Name)!

(Employee Name) is now registered for a (class type) class on (date) at (time).

All students are required to bring their book and completed pretest to class. Attached are the instructions for completing the required pretest.

If for any reason (employee name) is unable to attend this class, please contact us right away so we can assign the seat to another student.

We look forward to having (employee name) in our class! We will send the invoice for the training after it has been completed.

(Insert City Specific Signature and Your Name)

Email Body: BLS and Heartsaver Classes

Hello (Employer Contact Name)!

(Employee Name) is now registered for a (class type) class on (date) at (time).

If for any reason (employee name) is unable to attend this class, please contact us right away so we can assign the seat to another student.

We look forward to having (employee name) in our class! We will send the invoice for the training after it has been completed.

(Insert City Specific Signature and Your Name)

Step 6: If the Employer added an ACLS or PALS Book
(If the class is BLS or Heartsaver, the book will be waiting for the student at their class)

eBooks-
If we are billing for an eBook, login to eLearning and issue the eBook to the student. Copy the employer on the eBook email. Add a note to the student block in CPR.Center that you issued the eBook and include the eBook access code with your initials and date the eBook was issued.

Shipping a Physical Book-
If we are billing for an ACLS or PALS physical book that needs to be shipped, send a separate email to our shipping department, and include the following:

Employer name
Student name
Shipping Address
What type of book(s) to ship
 Date of the student's class
Type of Class
Employer email address
Student email address

*They need to know this information so they can add the tracking information to the student block and email it to the student and employer once received

**If the student is taking BLS and ACLS, and needs books for both, it is okay to issue both eBooks or ship both books together since you are already doing one for ACLS.

Step 7: If the Employer selected Blended/Online Learning with a Skills Check or just a Skills Check follow the steps below

- Issue the online course and copy the employer on the online course email

- Deduct the online course from the "city" specific inventory tracker in Dropbox

- Add a note to the student block in CPR.Center that you issued the online course and include the online course access code with your initials and date the course was issued.

- Send the skills session Confirmation Email Template to the employee and copy the employer.

Step 8: If this Employer Booked Their Employee Through Email, Move the email to the Off-Site Centers Folder in Outlook after completing the booking.