QuickPermit+
Youth Workplace Safety

Tutorial: Issuing Work Permits

> ❗ Print this tutorial and follow along from within QuickPermit+.
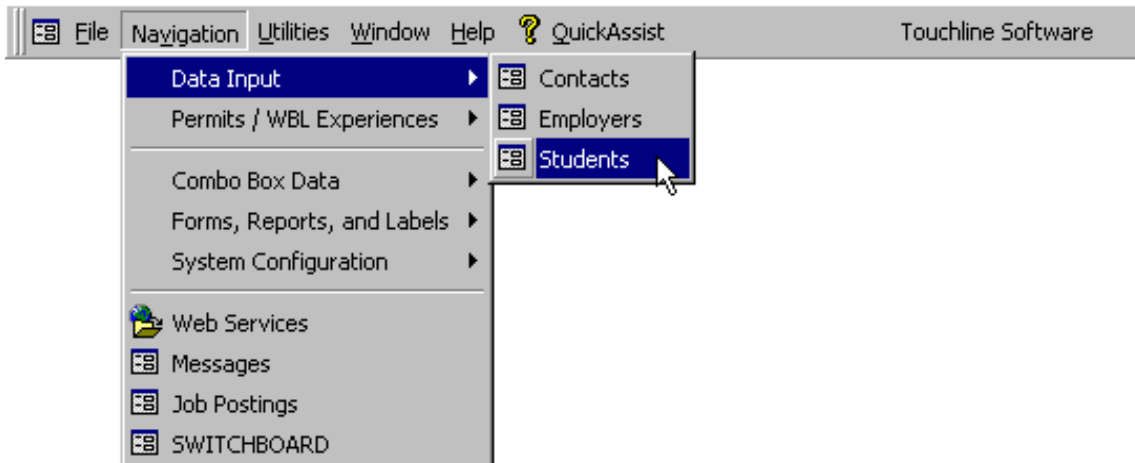
STEP 1 – Opening the Student Form

❖ Open the Student Form either by selecting the "Students" hyperlink on the Main Switchboard or by using the "Navigation" menu as shown below:

"Students" hyperlink

> ❗ Wait until you've issued a few work permits before exploring the other eight hyperlinks.

"Navigation" menu

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STEP 2 – Enter a New Student Record

> ❗ The Student Form is the program's primary screen. It opens in a "New Record" state ...ready for entering student data.

Student Form

To enter a new student record, start with a new (blank) record (select the "New Student" button if necessary). Place the cursor in the "Last Name" field and begin typing.

Use the "Tab" key to move to each of the subsequent fields.

Once the first and last name fields have been entered, additional form tabs become visible and most of the screen's other controls are no longer disabled (grayed out).

Some of the fields are pre-formatted or are a drop-down list. This makes data-entry faster, easier, and more accurate ...they may take some getting used to.

> Enter student's last name.

Field description and data formatting instructions are displayed in the screen's status bar (shown above – located at the bottom of your screen). The address fields are located below the student's name and are in standard block address format. They are not labeled (for space/screen-clutter reasons). Remember to check the status bar if you are in doubt as to a field's formatting or where to enter address information.

> ❗ Use the "Tab" key to move to the next field.

❖ Complete the Student Data and Student Information sections.

The "Student's School ID" field is optional, but recommended.
The three fields left blank are also optional.
For help with the City/Counselor fields see Appendix A.
Substitute your own data, if desired ...either real or practice.

> ❗ No need to hunt for a "Save" button
> ...Data is saved automatically.

STEP 3 – Adding a New Employer Record

❖ Open the Employer Form to a **New Record**.
   ➢ From within the Student Form, click the green button adjacent to the "Select Employer" field.
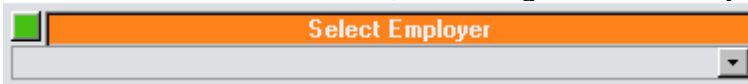
   ➢ From the Main Switchboard, click the "Employers" link.

> ❗ If the Employer Form opens to an existing employer's record, use the "New Employer" button to move to a new record.

Complete the Employer Data section.

The "Phone" and "Primary Contact" fields are optional, but recommended.
The three fields left blank are also optional.

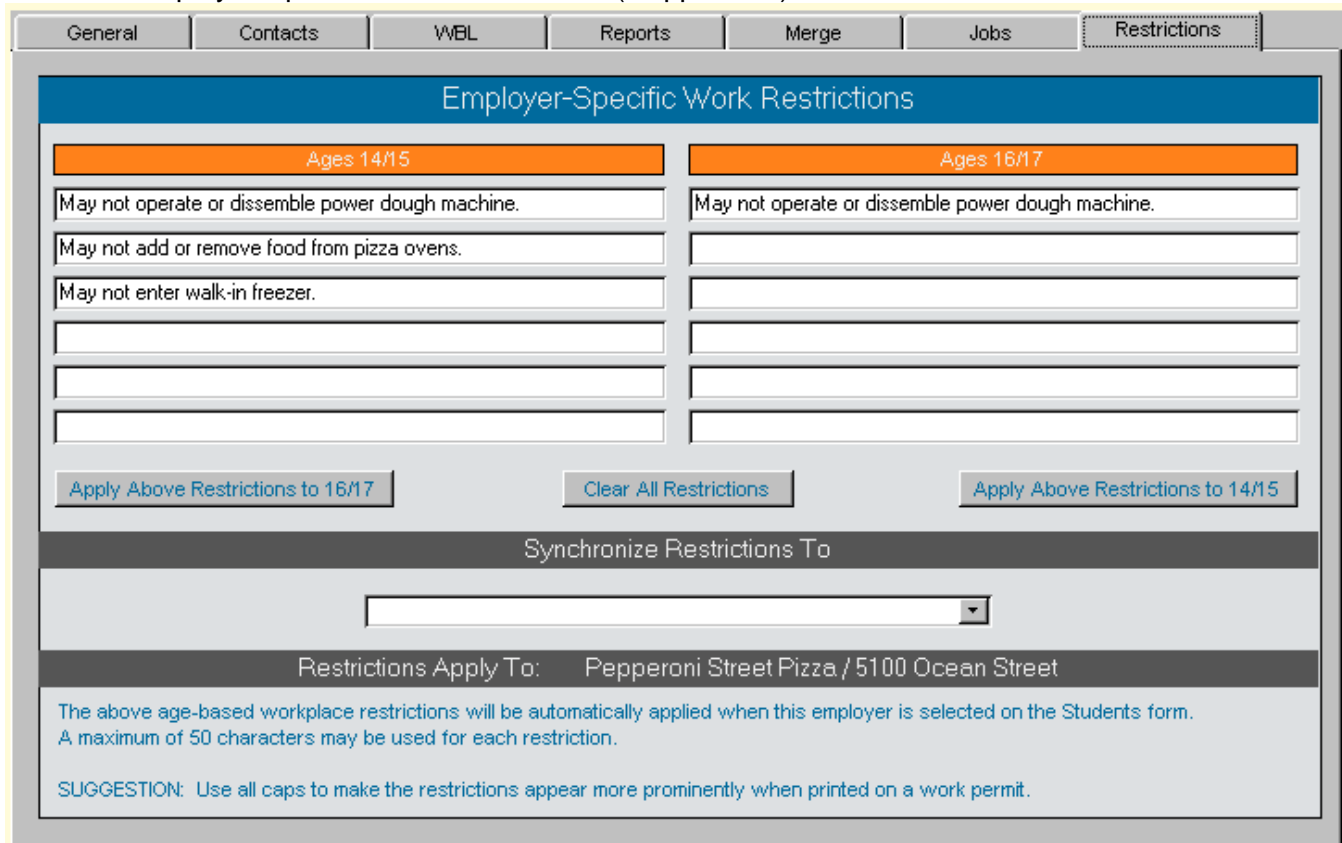Substitute your own data, if desired …either real or practice.

> ❗ Enter an "Employer Caution" at your discretion. When used, you'll receive a warning prompt (displaying the content of this caution) when issuing a work permit for this employer.

❖ **Do not** close the Employer Form yet, there's still more to do …select the "Restrictions" tab and proceed directly to the next step.

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> **!** Work restrictions defined here will be automatically applied when this employer is selected on the Student Form ...and displayed on all work permits issued to this employer.

STEP 4 – Protecting the Safety of Working Minors

❖ "Restrictions" tab of the Employer Form

❖ Enter Employer-Specific Work Restrictions (if applicable).

General	Contacts	WBL	Reports	Merge	Jobs	Restrictions

Employer-Specific Work Restrictions

Ages 14/15	Ages 16/17
May not operate or dissemble power dough machine.	May not operate or dissemble power dough machine.
May not add or remove food from pizza ovens.	
May not enter walk-in freezer.	

Apply Above Restrictions to 16/17	Clear All Restrictions	Apply Above Restrictions to 14/15

Synchronize Restrictions To

Restrictions Apply To: Pepperoni Street Pizza / 5100 Ocean Street

The above age-based workplace restrictions will be automatically applied when this employer is selected on the Students form. A maximum of 50 characters may be used for each restriction.

SUGGESTION: Use all caps to make the restrictions appear more prominently when printed on a work permit.

Substitute your own data, if desired …either real or practice.

> **!** The "Synchronize Restrictions To" section may be used to apply work restrictions from any employer to the currently-selected employer ...generally employers of the same general industry or type of business (i.e. fast food).

❖ Close the Employer Form using the
❖ "Close" button on the menu bar.

Close

❖ Answer "Ok" to the "Set Employer" message prompt.
    …The employer and related work restrictions will be applied to the student's record automatically.

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STEP 5 – Applying Permit-Related Data

Student Form (lower section)

❖ Remove data from all of the above fields and re-enter starting with selecting the most recently added employer.

➢ Select Employer
  ▪ Used to select the employer for which the student's work permit will be issued.
  ▪ Cannot be used to enter employer records that have not been created in the Employer Form.
  ▪ Scroll & Select – Open the drop-down list by clicking its down-pointing arrow. Scroll the list until you've found the correct employer and click it to make your selection.
  ▪ Textual Search – Begin typing the employer's name. A search is performed as each character is typed and the first record matching the text that you've entered will be displayed. If no records are displayed as you type, the employer isn't in the list (remove your search text and add a new employer using the green button adjacent to the field). If the correct employer location is displayed, either press the "Tab" or "Enter" key to make your selection.
➢ Permit Type   more information (see Appendix B)
  ▪ Select the applicable "Permit Type" ("Regular" is used for most work permits).
  ▪ The hours that a student can work are based on the student's age and the Permit Type.
➢ Work Restrictions   more information (see Appendix C)
  ▪ If the employer-specific work restrictions were entered, the fields will be auto-filled.
  ▪ Up to 6 work restrictions may be selected and applied to a work permit (50-character max).
➢ Memorized Remarks   more information (see Appendix D)
  ▪ Use the green button adjacent to the field to add/edit Memorized Remarks (255-character max).
  ▪ When a "Memorized Remark" is selected, it's text will be displayed in the "Additional Remarks" field. It's the contents of this field that will appear on work permits.
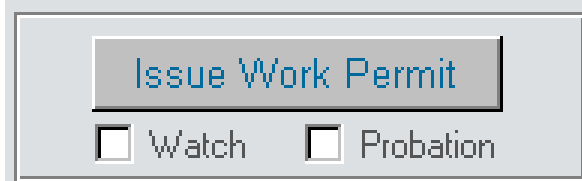➢ Additional Remark   more information (see Appendix D)
  ▪ Text may be entered directly into this field or edited after applying a "Memorized Remark".
➢ Pathway and WBL Type
  ▪ These fields are for use with the Work-Based-Learning program component.

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STEP 6 – Issue the Work Permit

> ❗ The number of work permit copies may be set in the "Express Settings" form and accessed using the Menu Bar:
> Navigation / System Configuration / Express Settings

❖ Click the "Issue Work Permit" button.

Issue Work Permit
☐ Watch   ☐ Probation

> ❗ Do Not use the "Issue Work Permit" button to print duplicate copies of work permits.
>
> Each time this button is pressed a new and unique record of a work permit is saved. This will be discussed in more detail later in this tutorial.

> ❗ To ensure that complete and accurate permits are created, an extensive validation process occurs each time that the "Issue Work Permit" button is pressed. Users will be prompted with a message dialog informing them of the specific condition that exists. Carefully read these message prompts as they are designed to guide you through the issuance process.
>
> Note: The last message prompt will ask if the permit was printed correctly. If you answer "No", the record of the work permit just issued/printed will be permanently deleted. This will not delete the student's record or any of its data.

> ❗ Selecting the "**Watch**" check box, before printing a work permit, will flag the permit as one that should be carefully watched for compliance with the district's permit issuance standards.
>
> Selecting the "**Probation**" check box, before printing a work permit, will place the permit on probation. In addition to printing a work permit designated as "Probationary", letters will be printed for both the employer and parents to inform them of the work permit's probationary status.

STEP 7 – Finding Student Records

The "Student Lookup" drop-down field is the fastest means of finding an existing student record. The following will provide an introduction to the use of this field. It's suggested that users experiment using each of the five Lookup Mode selection options.

"Student Lookup" drop-down field (shown with different Lookup Mode selections)

❗ **SSN** Lookup Mode Selected

❗ **SID** Lookup Mode Selected

❗ **First** Lookup Mode Selected

❗ **Last** Lookup Mode Selected


❗ **Ph** Lookup Mode Selected

❗ It may be helpful to think of the Student form as a giant Rolodex card system; where a single card/record is stored for each student. The Student Lookup control is used to provide quick access to the stored student card/record. You should never create more than one record for a student.

To lookup a student record:
1) Select the Lookup Mode that you wish to use.
2) Perform the search, using one of the following methods:
    a) Textual search – enter the text to be searched in the text-field for the Student Lookup control.
    b) Scroll the list – click the down-pointing drop-down arrow and scroll the student list.
3) Make the selection.
    a) Use the mouse to select a student record from the list.
    b) When using a textual search, just use either the Tab or Enter key once the correct record is highlighted in the drop-down list.

"Student Lookup" (Lookup Mode: SSN)
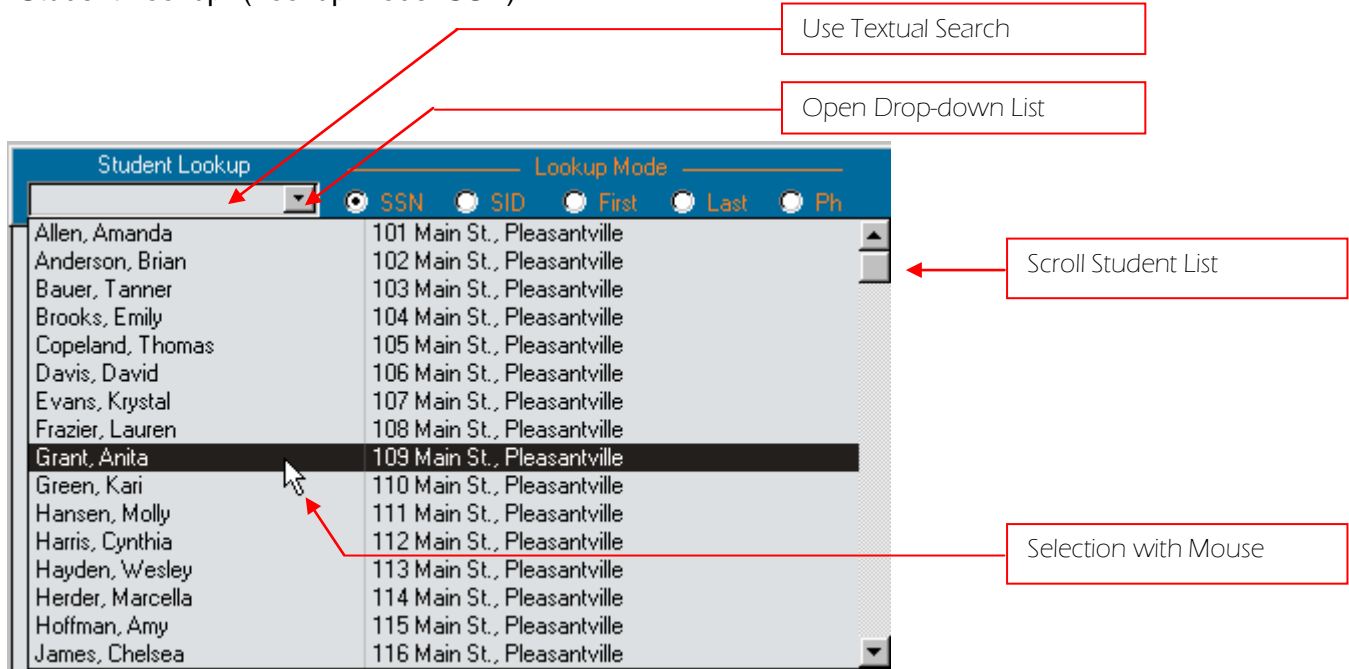
The table below describes how the Lookup Mode affects both the contents and order of records.

Lookup Mode	Content / Format	Sort Order	Comments
SSN	Last, First	Last, First (Ascending)	Included in list even if no SSN has been entered. May enter just the numeric digits.
SID	Last, First	Last, First (Ascending)	Included in list even if no SID has been entered. May enter just the numeric digits.
First	First Last	First Last (Ascending)	Entered as follows: First [space] Last
Last	Last, First	Last, First (Ascending)	Entered as follows: Last [comma] [space] First
Ph	Phone Last, First	Phone (Ascending)	Records not having a phone number are shown at the top of the list. May enter just the numeric digits.

If an existing student record cannot be found, a new record must be created. You can move to a new student record by selecting the "New Student" button found on the "Student Data" tab of the Student Form.

[New Student]

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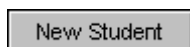
Appendix A

**City / Counselor –** drop-down controls

In addition to operating like a standard drop-down control, these fields provide automatic prompts to add newly entered data to the saved list. Additionally, prompts for deleting items from the saved lists are provided when data has been explicitly deleted from the control's text field.

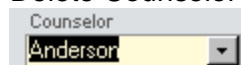Note: The counselor field is limited to a maximum of 15 characters (abbreviate as needed).

Add Counselor
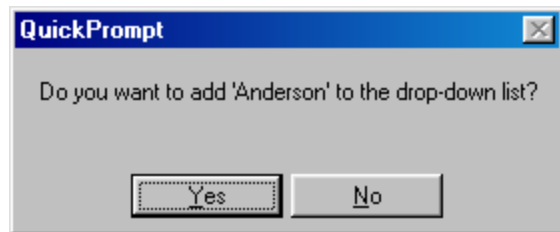
> ❗ Simply type a name that is not already saved in the list and answer "Yes" in the message prompt that is displayed after tabbing out of the field.
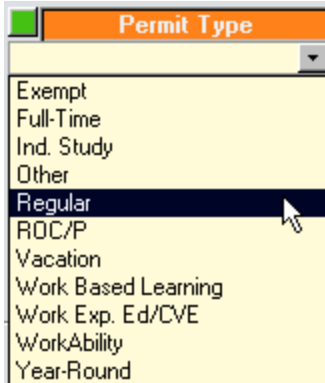
Delete Counselor
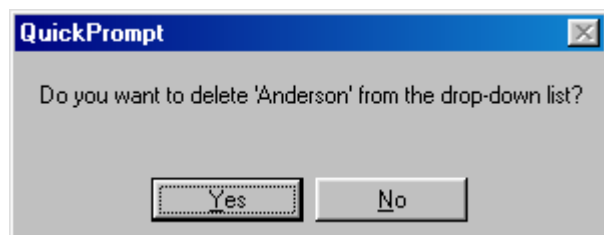
> ❗ Select the counselor to be deleted. Highlight the counselor's name and press the "Delete" key. Answer "Yes" in the message prompt that is displayed after tabbing out of the field.

Appendix B

Permit Type – drop-down control

Selecting the correct "Permit Type" is important because, combined with the student's age, it is used determine the hours that the student will be allowed to work.

> *Note: Although the eleven available permit types are preset, these descriptions may be edited and additional permit types can be added to the list by selecting the green "Hot Button" adjacent to the "Permit Type" title bar.*

Appendix C

Work Restrictions – drop-down controls

! Up to six individual work restrictions may be selected and applied to a work permit.

! Saved work restrictions may be selected using any of the six drop-down controls.

! New work restrictions may be entered directly into any of the six fields and may be saved by answering "Yes" to the message prompt upon tabbing out of the field.

! Clicking the green button adjacent to the Work Restriction title bar will open the Work Restrictions Form (below), where work restrictions may be added, edited, and deleted.

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Appendix D

Memorized Remark – drop-down control

> **!** To enter and save a new Memorized Remark, click its adjacent green button to open the Memorized Comments Form.
>
> To select saved remarks, use the control's drop-down button to scroll and make your selection from the previously saved remarks in the list.

Memorized Comments - Form

Instructions

Enter a comment title and comment text for each memorized remark. The title is only used to identify the memorized remarks in the students form. The comment text will appear in the additional comments field and on work permits.

Comment Title	Comment Text
▸ Medical Lift Restriction / 25 lbs.	Per doctor's orders, this student is restricted from lifting objects weighing more than 25 lbs.
*	

> **!** Use this form to add, edit, or delete comments that will be displayed in the Memorized Remark drop-down control.
>
> For each comment, enter a "Comment Title" and "Comment Text".

Memorized Remark
Medical Lift Restriction / 25 lbs.
Additional Remark
Per doctor's orders, this student is restricted from lifting objects weighing more than 25 lbs.

> **!** When a Memorized Remark is selected, its text is copied into the "Additional Remark" field.
>
> Once the Memorized Remark has been copied, the text of the Additional Remark may be edited without changing the original saved remark.

> **!** The "Additional Remark" field allows the direct entry of up to 255 characters of text to be displayed on a work permit and may be used independently of the Memorized Remark field.

Note: The Work Restriction and Additional Remark fields should be carefully considered for each work permit that is issued. In so doing, you can play an important role of helping to insure the protection of the student's health and safety in the workplace.