

## QUICK REFERENCE GUIDE

---

### HOW DO I...

- Review a participation request?
- Enroll a new participant?
- Download an enrollment form?
- Edit a participant's information?
- View a participant's course status?
- Retrieve a participant's completion certificate?
- Generate a report of everyone that has completed the course this month?
- Measure my program?

### TABLE OF CONTENTS

Login .....	2
Client Dashboard .....	2
Participation Requests .....	3
Approve/Deny Requests .....	3
Resend Approval Email .....	3
Enroll New Users .....	4
Step 1: Enter Participant Information .....	4
Step 2: Select Course(s) .....	5
Download Enrollment Form .....	6
Search/Edit Users .....	7
Search Results .....	7
Edit Participant Information .....	8
View Participant Course Status .....	8
Retrieve Participant Completion Certificate & Receipt .....	9
Completion Reports .....	10
Report Results .....	10
Program Analytics .....	11
Report Results .....	11

# LOGIN

**Participant Dashboard**  
Manage Courses, Pay Fees, Download Certificates

Log In to your Personalized Dashboard

Username

Password

**LOG IN**



**LOGIN**

Use your assigned Username (enter in the Citation#/Case# field) and Password (enter in the last name field) to login to your client dashboard.

# CLIENT DASHBOARD

Judicial District or Court Name  
— ONLINE PRETRIAL EDUCATION —

HOW IT WORKS SUPPORT CONTACT US LOG OUT

**User Support's Dashboard** [DASHBOARD INSTRUCTIONS](#)

- Participation Requests**  
Approve / decline requests to participate in courses.  
**GO**
- Enroll New Users**  
Add new participants while assigning courses and fees.  
**GO**
- Download Enrollment Form**  
Download and print a fillable enrollment form to give clients.  
**GO**
- Search / Edit Users**  
Search, view and edit participant profiles and course requirements.  
**GO**
- Completion Reports**  
Date-based reports to identify participants in compliance.  
**GO**
- Program Analytics**  
Evaluate your online education courses with valuable analytics.  
**GO**



**CLIENT DASHBOARD OPTIONS**

- Participation Requests\*  
Enroll New Users
- Download Enrollment Form\*  
Search / Edit Users
- Completion Reports  
Program Analytics



Based on unique program configurations, dashboard layout may vary.  
\*These options may not be available on all dashboards.

# PARTICIPATION REQUESTS\*

\*This option is NOT available on all dashboards.

## Approve/Deny Requests

Review Participation Requests

RETURN TO DASHBOARD

Show [ ] entries Search: [ ]

Citation #	Court Date	First Name	Last Name	Submission Date	Status	Actions
123456	01/01/2021	David	Burton	01/01/2021	APPROVED	RESEND EMAIL
123456	01/01/2021	David	Burton	01/01/2021	DECLINED	
123456	01/01/2021	David	Burton	01/01/2021	REVIEW	
123456	01/01/2021	David	Burton	01/01/2021	DECLINED	
123456	01/01/2021	David	Burton	01/01/2021	DECLINED	
123456	01/01/2021	David	Burton	01/01/2021	APPROVED	RESEND EMAIL
123456	01/01/2021	David	Burton	01/01/2021	REVIEW	
123456	01/01/2021	David	Burton	01/01/2021	REVIEW	
123456	01/01/2021	David	Burton	01/01/2021	APPROVED	RESEND EMAIL

Showing 1 to 8 of 8 entries Previous 1 Next

### REVIEW PARTICIPATION REQUESTS

Click REVIEW to view participation requests.

Citation #555555

Citation #: 555555

Court Date: 06/01/2030

Expiration Date: 07/01/2030

First Name: John

Last Name: Smith

Email: johnsmith@burtonservicesinc.com

Mailing Address: PO Box 388

City: Prairieville

State: Louisiana

Zip: 70759

Courses:

- English
- Client Intake \$ 5.00
- A Discussion on Relapse \$ 185.00
- Alcohol Awareness \$ 185.00
- Anti-Bullying Education \$ 185.00

### REVIEW INFORMATION IN POP UP WINDOW

Review/edit participant information and assign courses as needed. After you are finished, scroll down and click SAVE & APPROVE to approve the request or DECLINE to deny the request.

Manejar a la defen... (Defensive Driving) \$ 185.00

Toma de decis... (Effective Decision Making) \$ 185.00

SAVE & APPROVE DECLINE

## Resend Approval Email

Review Participation Requests

RETURN TO DASHBOARD

Show [ ] entries Search: [ ]

Citation #	Court Date	First Name	Last Name	Submission Date	Status	Actions
123456	01/01/2021	David	Burton	01/01/2021	APPROVED	RESEND EMAIL
123456	01/01/2021	David	Burton	01/01/2021	DECLINED	
123456	01/01/2021	David	Burton	01/01/2021	REVIEW	
123456	01/01/2021	David	Burton	01/01/2021	DECLINED	

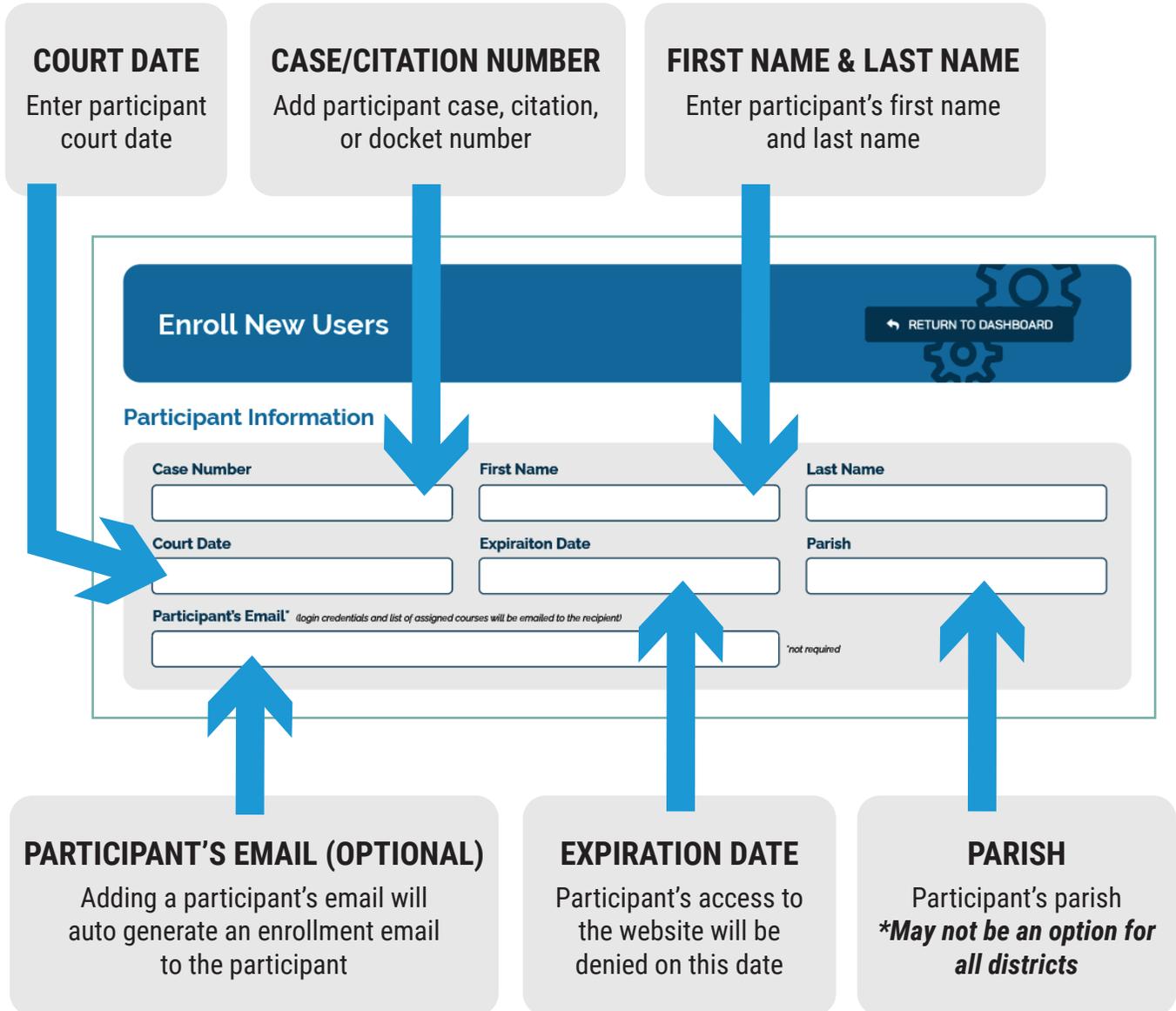
### RESEND APPROVAL EMAIL

If a participant has been approved, but did not receive an approval email, click RESEND EMAIL.



# ENROLL NEW USERS

## Step 1: Enter Participant Information



# Step 2: Select Course(s)

## Select Courses

Please select all courses to assign to this participant. If this participant's course fee is different than what is shown, select the correct price tier from the drop-down list before moving forward. When you have selected all courses and fees, scroll down and click the ADD PARTICIPANT button to complete this enrollment.

English	
<input type="checkbox"/> + Client Intake	\$ 185.00
<input type="checkbox"/> A Discussion on Relapse	\$ 185.00
<input type="checkbox"/> Alcohol Awareness	\$ 185.00
<input type="checkbox"/> Begin Recovery	\$ 185.00
<input type="checkbox"/> + Client Intake	\$ 185.00
<input type="checkbox"/> A Discussion on Relapse	\$ 185.00
<input type="checkbox"/> Alcohol Awareness	\$ 185.00
<input type="checkbox"/> Begin Recovery	\$ 185.00
<input type="checkbox"/> + Client Intake	\$ 185.00
<input type="checkbox"/> A Discussion on Relapse	\$ 185.00

Spanish	
<input type="checkbox"/> Abuso de sustancias (Substance Abuse)	\$ 185.00
<input type="checkbox"/> Conciencia del alcohol (Alcohol Awareness)	\$ 185.00
<input type="checkbox"/> Los prevención de robos (Theft Prevention)	\$ 185.00
<input type="checkbox"/> Manejar a la defensiva (Defensive Driving)	\$ 185.00
<input type="checkbox"/> Abuso de sustancias (Substance Abuse)	\$ 185.00
<input type="checkbox"/> Conciencia del alcohol (Alcohol Awareness)	\$ 185.00

### SELECT COURSE(S)

Check the boxes of course(s) you wish to assign

English	
<input type="checkbox"/> + Client Intake	\$ 5.00
<input type="checkbox"/> A Discussion on Relapse	\$ 185.00
<input checked="" type="checkbox"/> Alcohol Awareness	\$ 185.00 ✓
<input type="checkbox"/> Anti-Bullying Education	\$ 285.00

### SELECT COURSE PRICE

Select the price of each course that you wish to assign (*if applicable*)

### CONFIRM SELECTIONS

Once you have finished assigning courses, scroll down and click ADD PARTICIPANT to complete the enrollment process.

<input type="checkbox"/> Alcohol Awareness	\$ 185.00
<input type="checkbox"/> Begin Recovery	\$ 185.00
<b>ADD PARTICIPANT</b>	

- Sexual Battery Education
- Substance Abuse
- The Facts About Addiction
- Vaping Education
- WLF Litter Prevention

The participant has been successfully enrolled into the selected course(s). Thank you.

Ok



# DOWNLOAD ENROLLMENT FORM\*

\*This option is NOT available on all dashboards.

The screenshot shows the 'User Support's Dashboard' with a dark blue header containing the text 'Judicial District or Court Name' and 'ONLINE PRETRIAL EDUCATION'. Navigation links include 'HOW IT WORKS', 'SUPPORT', 'CONTACT US', and 'LOG OUT'. The dashboard features several cards: 'Participation Requests', 'Enroll New Users', 'Download Enrollment Form' (highlighted with a yellow circle and a blue arrow), 'Search / Edit Users', 'Completion Reports', and 'Program Analytics'. Each card has a 'GO' button.

## DOWNLOAD FORM

From the dashboard, click GO to download a copy of the fillable enrollment form.

## EXAMPLE FORM

The example form is titled 'Pretrial Intervention Program' and 'Your Parish District Attorney'. It includes fields for 'NAME' and 'CASE NUMBER'. The text reads: 'You have been given the opportunity to participate in an online education program offered by Your Parish District Attorney Office. To enroll in your course, follow these steps: 1. Go to the following website: [www.website.com](http://www.website.com) 2. Click on the **GET STARTED** or **LOG IN** button 3. Login with your **CITATION** or **CASE NUMBER** and **LAST NAME** 4. You will be directed to your Student Dashboard with your list of assigned courses:'. Below this is a list of checkboxes for various courses, including 'A Discussion on Relapse', 'Alcohol Awareness', 'Anti-Bullying Education', 'Anti-Hazing Education', 'ATC Underage Sales', 'ATV & Boating Safety', 'CDL Driver Intervention', 'Conflict Resolution', 'Defensive Driver', 'Effective Decision Making', 'Financial Responsibility', 'Hunting & Fishing Regs', 'Impaired & Distracted Driving', and 'Litter Prevention'. A separate box titled 'CBT CLASSES' contains 'Effective Decision Making', 'Employee Theft', 'Identity Theft Prevention', 'Shoplifting (Adult)', and 'Shoplifting (Juvenile)'.



# SEARCH/EDIT USERS

## Search / Edit Participants

[RETURN TO DASHBOARD](#)

### Participant Search

Please enter your search terms in one of the boxes below and click **Submit**.

Search by Citation #	Search by Name	Search by Court Date	
<i>Citation #</i> <input type="text"/>	<i>First Name</i> <input type="text"/>	<i>Start Date</i> <input type="text"/>	<b>SUBMIT</b>
	<i>Last Name</i> <input type="text"/>	<i>End Date</i> <input type="text"/>	

Citation/Case #

Name

Court Date

**SUBMIT**  
Click SUBMIT to search

**SEARCH FOR PARTICIPANT BY**

## Search Results

### Search Results

Show  entries

Search:

Citation #	First Name	Last Name	Court Date	Expiration Date	Assigned Courses	Action
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>A Discussion on Relapse</li> <li>Alcohol Awareness</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Client Intake</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Begin Recovery</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Effective Decision Making</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>CDL Driver Education</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Conflict Resolution</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Vaping Education</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Theft Prevention (Retail)</li> </ul>	EDIT

Showing 1 to 8 of 8 entries

Previous **1** Next



# Edit Participant Information

**Search Results**

Show  entries Search:

Citation #	First Name	Last Name	Court Date	Expiration Date	Assigned Courses	Action
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>A Discussion on Relapse</li> <li>Alcohol Awareness</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Client Intake</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Begin Recovery</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Effective Decision Making</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>CDL Driver Education</li> </ul>	EDIT

## EDIT PARTICIPANT INFORMATION

From Search Results, click EDIT to change participant information.

Citation # (not editable)  Court Date  Expiration Date

First Name  Last Name  Email

Mailing Address

City  State  Zip

Driver's License #  Birth Date

**Assigned Courses**

English	Spanish
<input type="checkbox"/> Client Intake \$ 5.00 <input type="checkbox"/> A Discussion on Relapse \$ 185.00	<input type="checkbox"/> Abuso de sustancias (Substance Abuse) \$ 185.00 <input type="checkbox"/> Conciencia del alcohol (Alcohol Awareness) \$ 185.00

## CHANGE INFORMATION IN POP UP WINDOW

Change participant information and courses as needed. If an email address is added or edited, an enrollment email will automatically be sent. After you are finished, scroll down and click UPDATE PARTICIPANT PROFILE.

**\*Note: Citation/Case # cannot be edited. Please contact customer support to edit.**

## RESEND EMAIL IN POP UP WINDOW

If a participant has been enrolled, but did not receive an enrollment email, click RESEND EMAIL.

# View Participant Course Status

**Search Results**

Show  entries Search:

Citation #	First Name	Last Name	Court Date	Expiration Date	Assigned Courses	Action
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>A Discussion on Relapse</li> <li>Alcohol Awareness</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Client Intake</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Begin Recovery</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Effective Decision Making</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>CDL Driver Education</li> </ul>	EDIT

## VIEW CURRENT COURSE STATUS

From Search Results, click any assigned course name.

Case # C20003913

Course: Substance Abuse

Status: Enrolled

Fee: \$139.22

## COURSE STATUS IN POP UP WINDOW

**Enrolled** – Assigned, Not started  
**In Progress** – Started, Not complete  
**Passed** – Course exam has been passed  
**Fee** – Displays PAID, if course fee has been paid



# Retrieve Participant Completion Certificate & Receipt

**Search Results**

Show  entries Search:

Citation #	First Name	Last Name	Court Date	Expiration Date	Assigned Courses	Action
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>A Discussion on Relapse</li> <li>Alcohol Awareness</li> </ul>	
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Client Intake</li> </ul>	
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Begin Recovery</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Effective Decision Making</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>CDL Driver Education</li> </ul>	EDIT
123456	David	Burton	01/01/2021	01/01/2021	<ul style="list-style-type: none"> <li>Conflict Resolution</li> </ul>	EDIT

**VIEW COMPLETION CERTIFICATE & RECEIPT**

From Search Results, click any assigned course name.

**Case # C19001197**

Course: Alcohol Awareness  
 Status: Passed  
 Fee: \$139.22 Paid

Certificate : [Download](#)  
 Receipt : [Download](#)

[CLOSE](#)

**DOWNLOADS IN POP UP WINDOW**

If participant has passed the course AND paid their fee, click DOWNLOAD for a copy of their completion certificate and/or payment receipt.

**EXAMPLES**

**Your Parish District Attorney**

**Billing Address**

John Doe  
 123 Address Street  
 City, ST 12345

**Receipt**

Order Number	CAD-14871
Order Date	May 28, 2019
Payment Method	Credit card
Email	
Telephone	

Product	Price	Quantity	Total
Effective Decision Making	\$139.22	1	\$139.22
<b>Subtotal</b>			<b>\$139.22</b>
<b>Total</b>			<b>\$139.22</b>

**YOUR JUDICIAL DISTRICT ATTORNEY**  
 ONLINE EDUCATION CERTIFICATE OF COMPLETION

**COURSE TITLE**  
 This certificate is presented to:

**John Doe**

This certifies that the participant listed above has successfully completed the Online Education Course offered by Your Judicial District Attorney.

Case # 555555  
 Driver's License: 123456LA  
 Course Status: Passed

CT-123456  
**CERTIFICATE #**

January 1, 2021  
**COMPLETION DATE**



# COMPLETION REPORTS

## Completion Reports

[RETURN TO DASHBOARD](#)

*Having trouble? Try the archives.*

**Course Status**

Select Status ▼

**Start Date**

**Courses**

All Courses  
 A Discussion on Relapse  
 Alcohol Awareness  
 Begin Recovery

**End Date**

**SUBMIT**

**COURSE STATUS**

**In Progress** – Started, Not complete  
**Passed and Paid** – Course and payment complete

**DATE RANGE**

Enter report start date and end date

**SELECT COURSE(S)**

Select a course, multiple courses, or select all courses for report

**SUBMIT**

Click SUBMIT to search

## Report Results

**SEARCH REPORT**

**DOWNLOAD REPORT**

**Report Results**

Search:

**DOWNLOAD REPORT IN CSV FORMAT**

Citation #	First Name	Last Name	Court Date	Exp Date	Course	Date Passed	Date Paid	Fee
123456	David	Burton	01/01/21	01/01/21	A Discussion on Relapse	01/01/21	01/01/21	\$185.00
123456	David	Burton	01/01/21	01/01/21	Alcohol Awareness	01/01/21	01/01/21	\$185.00
123456	David	Burton	01/01/21	01/01/21	Begin Recovery	01/01/21	01/01/21	\$185.00
123456	David	Burton	01/01/21	01/01/21	Client Intake	01/01/21	01/01/21	\$185.00
123456	David	Burton	01/01/21	01/01/21	Effective Decision Making	01/01/21	01/01/21	\$185.00
123456	David	Burton	01/01/21	01/01/21	CDL Driver Education	01/01/21	01/01/21	\$185.00
123456	David	Burton	01/01/21	01/01/21	Conflict Resolution	01/01/21	01/01/21	\$185.00



# PROGRAM ANALYTICS

Program Analytics
← RETURN TO DASHBOARD

**Start Date**

**End Date**

**Courses**

All Courses  
 A Discussion on Relapse  
 Alcohol Awareness  
 Begin Recovery

RUN ANALYTIC REPORTS

**DATE RANGE**

Enter report start date and end date

**SELECT COURSE(S)**

Select a course, multiple courses, or select all courses for course analytics

**RUN ANALYTIC REPORTS**

Click RUN ANALYTIC REPORTS to generate reports by course

## Report Results

**Analytic Reports by Course**

Assigned Courses	Start Date	End Date	DOWNLOAD ALL ANALYTIC REPORTS
+ Client Intake	June 1, 2021	June 4, 2021	Download PDF
A Discussion on Relapse	June 1, 2021	June 4, 2021	Download PDF
Alcohol Awareness	June 1, 2021	June 4, 2021	Download PDF

**Pretrial Intervention Program**

YOUR PARISH DISTRICT ATTORNEY

October 1, 2020 - October 31, 2020

**STATISTICS & ANALYTICS FOR:  
EFFECTIVE DECISION MAKING**

Completion Percentage

The program completion percentage measures the percentage of expired defendants given the Pretrial Intervention option that have completed the program before their assigned court date and/or expiration date.

TOTAL OFFENDERS	27
TOTAL COMPLETIONS	20
DID NOT COMPLETE	7

**VIEW/DOWNLOAD REPORT**

Click to view or download each report by course or download all reports

**EXAMPLE REPORT**

11