



1) PURPOSE

- a) To define policies and procedures for scheduling and registration for In-House or Public CPIM, CSCP, and Fundamentals courses.

2) PHILOSOPHY

- a) The Chapter will conduct course scheduling and registration in a competent manner that reflects well on the professionalism of the Chapter. Additionally, the Chapter will provide a way for companies to hold courses in their facility which is open only to their employees. The Chapter will provide this service in a way that is fiscally beneficial to the Chapter and minimizes its administrative expense.

3) SCOPE

- a) This policy applies to the VP Education or designee and the Chapter Administrative Support Associate (CASA).

4) POLICY/PROCEDURE

a) Definitions

- i) In-House Course. A course which is held at a company in which only that company's employees can attend.
- ii) Public Course. A course which is open to the general public. They may be held in a company or other public place.
- iii) Chapter Administrative Support Associate (CASA). The person or company the Chapter hires to coordinate registrations, respond to phone calls, internet inquiries, do banking, write checks, make payments, and other administrative functions as assigned.

- b) A per-participant fee structure is established and documented in Policy 04-005. Participant Guides and textbooks will **not** be included in this fee.

- c) Minimum numbers of participants to hold a course are defined in Procedure 04-005.

- d) Registration is not complete until the Chapter office has received payment in full.

- e) Payment must be received no later than the first day of class. Instructors are not to handle payments.

- f) The VP Education is responsible for scheduling courses, instructors and course locations. The Excel file "Schedule of Classes.xls" will be maintained showing past, current, and planned course schedules.

- g) The CASA will provide an on-line form for people to register online. If the course is an In-House course, the CASA will create a new form on the website that does not have links to it from other pages. The VP Education is responsible to provide the CASA all pertinent information for this form. Once completed, the CASA will provide a link to this form to the VP Education and he/she will then pass this link along to the company contact.

- h) The CASA will track all registrations and maintain a course registration list using an Excel spreadsheet. It will contain all pertinent participant contact and payment information. The CASA will confirm membership in the Chapter records for those

claiming APICS Phoenix membership status. The CASA will email the updated list to the VP Education two weeks prior to the start of the course. The VP Education and CASA will remain in close contact for any changes to the list up to the start of the course.

- i) The VP Education is responsible for verifying memberships for IMA or ISM memberships or APICS members who are members of a different Chapter.
- j) After first receipt of the contact list from the CASA, the VP Education will determine if the course minimum attendance has been met. If they have been met, The VP Education will contact the registrants to confirm that the course is being held. If the minimums are not met the VP Education must determine whether or not to postpone the course. In the event that the course is cancelled or postponed the VP Education is responsible to notify all registrants.
- k) Additional VP Education responsibilities:
  - i) Insure payment for each participant is made on time.
  - ii) Providing the participant roster and payment status to the instructor prior to the start of the course.
  - iii) Delivering the Instructor Kit to the instructor at least one week prior to the first night of the course. A Kit Checkout Sheet will be completed per Procedure 03-019 and signed by both the instructor and VP Education or designee.
  - iv) Providing Certificates of Completion to the instructor. These must be provided before the last course session but the instructor will not issue it to any participant who has not met minimum attendance requirements.
- l) Changes to this policy will require the VP Education to make sure the changes are reflected in our marketing message on our web site.
- m) Certificates of Completion will be issued to all participants who have missed less than 3 classes.
- n) A list of marketing advantages for In-House courses for inclusion on our website include:
  - i) Lower than non-member pricing (historically, nearly all In-House course participants are non-members).
  - ii) Convenience of an instructor going to their facility.
  - iii) The instructor can become familiar with their company-specific issues and emphasize the material in the appropriate places.
  - iv) Availability of one payment lowers administrative costs.

5) ATTACHMENTS/OTHER CLOSELY RELATED POLICIES/PROCEDURES

- a) Attachment(s)
  - i) Excel file: "Schedule of Classes.xls"
  - ii) Excel file: "Kit Checkout Sheet.xls"
- b) Closely Related Policies/Procedures/Documents
  - i) 02-040 Recognition Certificate Preparation
  - ii) 03-007 Instructor Responsibilities
  - iii) 03-019 Course Management Overview
  - iv) 03-022 Class Completion and Closeout Procedures
  - v) 04-050 Ordering from Society



**Policy Number: 03-021    Revision No. C**  
**Policy Title: Course Scheduling and Registration**  
**Date: July 21, 2006**

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- vi) 04-005 Fee Schedule
- vii) 04-031 Chapter Chart of Accounts Policy

6) RESPONSIBLE FOR MAINTENANCE AND COUNSEL CONCERNING THIS POLICY:

- a) VP Education