



# Instructor & Accounts Management Process Map

Process	Instructor Management	Profile	Requests	Teaching Progress	Accounts Debits/Credits	Client Summary	Certificate Requests	Expense Tracking/Billing	E-Commerce	Online Resources
Responsibility	Instructors	Instructors	Instructors	Instructors	Instructors	Instructors & EFL	Instructors & Clients	Instructors	Instructors	EFL
<b>Actions</b>  <b>Red – Critical Activity</b> <b>Green – WebPages</b> <b>Purple – Legal and/or regulatory requirement</b>  <b>QUALITY OBJECTIVES</b>  <b>To meet our deadlines and have 0 errors upon Marketing Review</b>	<p>1 Welcome to the Instructors Management and Accounts Management sections. This is the online service English For Living has developed to help you run your business as a partnership with EFL.</p> <p>2 You will notice that there are a number of web pages designed to help you in your management of clients and your training business. Please explore and become familiar with them. This Process Map will help you to get an overall view of EFL online resources.</p> <p>3 If you have any questions, please contact us online at <a href="mailto:info@englishforliving.com">info@englishforliving.com</a>.</p> <p>4 Once you have registered and Logon through your alias, email or ID and password, you will be granted access to all the Instructor management web pages.</p>	<p>1 <b>In your profile tab, this will outline all the questions and answers that you have filled during your registration process.</b></p> <p>2 <b>All the information is stored on our secured database and cannot be view without the consent of the instructor or EFL administration.</b></p> <p>3 <b>As the instructor, you can and will be able to update your information as you continue in your advancement with English For Living.</b></p> <p>4 <b>The web pages are listed as follows:</b></p> <ol style="list-style-type: none"> <li>General Information</li> <li>Education</li> <li>Experience</li> <li>Programs</li> <li>Web content</li> <li>Resume</li> <li>Your instructor Rating.</li> </ol> <p><b>You will have a choice as to how you want to present yourself to potential clients who will be reviewing your online profile pages with EFL. You have a Option of 3 Instructor Website templates with a unique theme:</b></p> <ol style="list-style-type: none"> <li>Basic</li> <li>Contemporary</li> <li>Professional</li> </ol>	<p>1 As an English For Living Instructor, you will be able to request materials to further advance your training business.</p> <p>2 In the Introduction to the <b>Requests Tab</b>, you will have options to what you would like to request:</p> <ol style="list-style-type: none"> <li>Marketing Materials</li> <li>Resource Materials</li> <li>Certificates</li> <li>Instructor Rating Assessment</li> </ol> <p>4 <b>Click on the appropriate box for the items you want to request. Note that some sections will ask you if the amount is correct. Click Yes/No to Confirm.</b></p> <p>Note that EFL's General English 1 &amp; 2 can be downloaded and printed on your local printer for your convience.</p> <p>5 A running subtotal of all the items chosen will appear at the bottom of the page. <b>GST is only applicable to Canadian Residents.</b> A Total will appear.</p> <p>Click on the <b>"purchase"</b> button. This will take you to the <b>E-Commerce web pages.</b></p>	<p>1 One of the benefits of English For Living is that EFL will track the training program chosen by your clients.</p> <p>2 The <b>Teaching Progress Tab</b> will track Requests for instruction by clients to which you respond by Denying or Accepting the request. If you accept, an email notice will be sent to the client and they will confirm. You will be able to view the <b>client's profile online</b> before making your choice to accept the English training request.</p> <p>3 <b>The programs are divided into Ten levels. Upon completion of a level, either the instructor or client can enter their progress page and update. A notice will be sent out to the other person asking them to verify.</b></p> <p><b>This is a built in Quality system to help with proper instruction of the program.</b></p> <p>4 When the program reaches 100% completion. An email request will be sent out to the instructor to request a certificate. A reminder will be sent to the client also.</p> <p>5 Click the <b>"Order Certificate"</b> button from the teaching progress webpage to flag EFL to produce a certificate for the graduating client. This will take you to the <b>Request page.</b></p>	<p>1 <b>In the Accounts Tab, this is a quick summary page of your current account status with English For Living. Note the color of the header. Blue is active account with credits, Red is a delinquent account owning (debits.).</b></p> <p>2 <b>Any balance below \$40 will be notified by email if the balance remains delinquent for 24 hours or longer. The system will immediately freeze any online debit transactions until payment is received by credit card.</b></p> <p>3 For a more detailed Account summary, click on the "More detailed button" This will also take you to the full accounts Management service. The tabs are as follows:</p> <ol style="list-style-type: none"> <li>Credits/Debits</li> <li>Client Summary</li> <li>Certification Request Summary</li> <li>E-Commerce</li> <li>Expense Tracking</li> <li>Billing</li> </ol> <p>4 To purchase more credits on your EFL account, click the <b>"Purchase Credit"</b> button. This will take you directly to our E-Commerce page where you can purchase as much credits as you would like.</p> <p>5 Contact us online at <a href="mailto:info@englishforliving.com">info@englishforliving.com</a>.</p>	<p>1 The <b>Client Summary Tab</b> is to help you view all the clients that you have taught to date.</p> <p>2 The client summary contains the information on the Client ID, Status in the system, the EFL programs they have taken, their certificate number, date of registration and completion, link to client webpage, their phone number and email address.</p> <p>3 All information on training history can be used as references for further advancement with the EFL rating assessments.</p>	<p>1 The <b>Certificate Request summary Tab</b> details all the information on all certificates requested through your Instructor ID.</p> <p>2 It will list the client ID and their name, date of registration, cost and the status of their certificate.</p> <p>3 The status of the Certificates could be Pending, Processed, Sent to Instructor, or received by client.</p> <p>4 To verify that the client has received their certificate, the client will check of receipt of receiving certificate.</p>	<p>1 An added feature on EFL online resource for accounts management is the <b>Expense Tracking Tab</b> and the <b>Billing Tab</b>.</p> <p>2 You can choose to track expenses incurred for your business. The different expenses are listed for your reference. You can decide to track from month to month and export the data over to billing if you wish.</p> <p>3 Also tracking your expense to a client will help you to evaluate the costs incurred in instructing some clients. This information will assist you in preparation for financial statements for your training business.</p> <p>4 This is very handy at the end of the year when doing your income tax. See Tax Tips in the News Tab.</p> <p>5 The <b>Billing Tab</b> is to help you produce professional invoices to clients. This resource is only a template and the information is not stored. You can download the template and fill in the invoice manually to bill your clients with a written invoice.</p>	<p>1 The <b>E-Commerce</b> is the means by which you can make payments to EFL. It is a very simple and secured process to help you run your business better.</p> <p>2 Upon a request for purchase, the system will generate an invoice listing the items of purchase. Please print off a copy and keep for future reference.</p> <p>3 If the information is correct click <b>"next"</b> to input your credit card information. Enter in the required fields of information.</p> <p>4 <b>Click on "Purchase Now" button to authorize the transaction. All Transactions will be stored in the database in case of a discrepancy.</b></p> <p>5 <b>Your transaction will be verified for sufficient funds and a page will come up either declining or approve your transaction.</b></p> <p>6 <b>If declined, you can re-enter the information or contact English For Living. <a href="mailto:InstructorSVS@englishforliving.com">InstructorSVS@englishforliving.com</a></b></p> <p>7 <b>Upon approval, a receipt page will appear. A copy of this page will be sent to your email. Kept a record of the EFL confirmation number and Visa confirmation number. This page can be printed to your printer.</b></p>	<p>1 English for Living is available 24/7 to help you with any concerns you have as an instructor.</p> <p>2 You have access to training resources online, EFL Account management for Instructors, Teaching progress and teaching summary pages. This is all in an effort to help you run your business as an instructor better with EFL.</p> <p>3 You can request certifications for your clients, training materials, and instructor evaluations and with courses available for upgrading your skills.</p> <p>4 We hope you continue to use English for Living.</p>