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Learner Records Tip Sheet

This tipsheet was created for users of the CALP database.

Use this tipsheet to learn about:

- [Entering a Learner Record](#)
- [Duplicate Learner Records](#)
- [Adding a Learner Comment](#)
- [Finding Learner Comments](#)

Duplicate Learner Records

Duplicate learner records can cause a lot of confusion when trying to register learners. Using more than one learner record if a learner registers in multiple classes over the year will also create false data in the final report.

The database will **not** flag duplicate learner records created outside of a registration. Be sure to search the learner page **before** adding a new learner record. To search for a learner record:
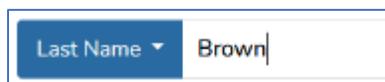
Click *Learners* in the navigation menu on the Dashboard
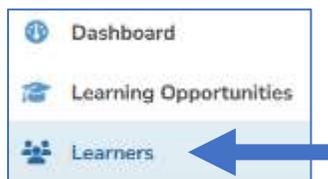
Click the *All text fields* box and select Last Name

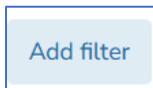Type the learner's last name in the search box (i.e. Brown)

Click *Search*

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The database will show a list of all learners with the last name Brown

To search by an additional parameter:

Click the *Add filter* button next to the search button

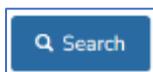Follow the steps above and choose *First Name* as your next parameter

Type the learner's first name in the second search box (i.e. Charlie)

You will now have two active search parameters

Click *Search*

The database finds only learners named Charlie Brown

You can add as many parameters as you need to narrow down your search. If the learner is already in your list, click on their name to open the record and check that all of your information is up to date. **Do not** enter another learner record.

If the learner's name is **not** in the list, continue with the steps below to add them to your database.

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Entering a Learner Record

Learner records help CALPs track who's coming through the doors (and get a feeling for who's not). Records are automatically created (or updated) when a learner registers for a learning opportunity. Records can also be created prior to registration. Learner records remain in your database and can be accessed year after year.

Note: if you add a learner record using the method below (outside of a registration), you must also register the learner for them to show up in a learning opportunity class list.

To enter a learner outside of a registration:

Click *Learners* in the navigation menu on the Dashboard
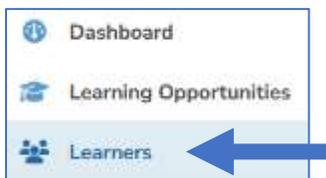
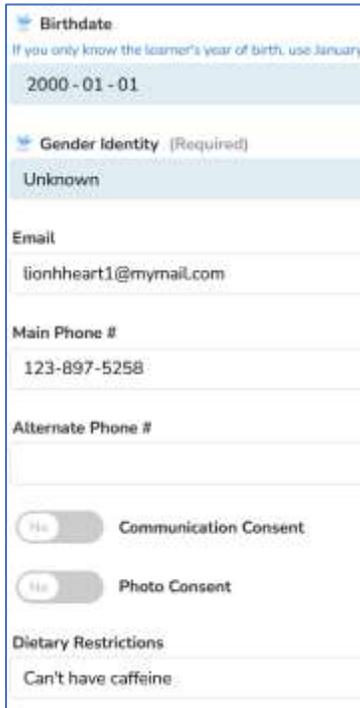Click *+ New learner*

Fill in all of the required information

You may want to add an image to group all learners in one learning category (i.e. digital skills)

Enter the learner's first name

Enter the learner's last name

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Fields with the ☘ CALP logo are not required, but are exported in the final report

Birthdate
If you only know the learner's year of birth, use January
2000 - 01 - 01

Gender Identity (Required)
Unknown

Email
lionhheart1@mymail.com

Main Phone #
123-897-5258

Alternate Phone #

(No) Communication Consent

(No) Photo Consent

Dietary Restrictions
Can't have caffeine

The learner's date of birth (or year) allows the database to report them in the correct age category under learner demographics. If you only know the year, use January 1st as their birthday.

It's ok to use the *unknown* field for any information you don't have. For **all** CALP-reportable ☘ demographics (birth date, gender identity, previous schooling, learner profile), only report what the learner is comfortable disclosing. If a learner doesn't wish to disclose some information, that's ok. Don't force them and don't guess.

Enter a way to reach the learner in case of class changes/cancellations (whichever is the learner's preferred method of communication)

Communication consent means the learner agrees to receive information from your CALP *apart* from the classes they register for

Photo consent means the learner agrees to let you use their picture for CALP purposes

Be sure to include any dietary restrictions to prevent health issues when you offer snacks/drinks
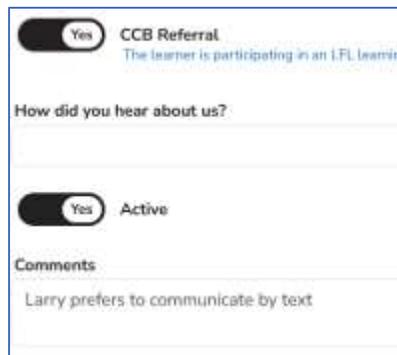
(Yes) **CCB Referral**
The learner is participating in an LFL learni...

How did you hear about us?

(Yes) **Active**

Comments
Larry prefers to communicate by text

If the learner is coming in for foundational learning help as a result of attending a CCB class in the past, click *CCB Referral* button to make it active

If the learner will enroll in a class, click the *Active* button to easily identify which learners are currently attending classes

Enter any helpful information under *Comments*

Click *Submit*

Submit

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Adding a Learner Comment

Learner comments can be very helpful when multiple CALP staff work with learners. Comments in registration records help us identify things like communication preferences or any required classroom supports. Add comments to a learner's **registration** to flag dietary restrictions or other important information on the Class List.

Add comments to the *Learner Comments* page to help track things like learner progress or interactions with the CALP.

To add a learner comment:

Click *Learners* in the navigation menu on the Dashboard
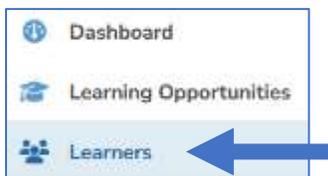
Click *Learner Comments*

The database will display a list of all comments entered to date

Click *+ New comment*

Complete all required information

Include the learner's name (**Note:** the learner must already be in the database to complete this step)

Enter the date the comment was added

Include enough detail for the comment to make sense to staff who see it

Click *Submit*

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Finding Learner Comments

To find all comments on the Learner Comments page that relate to a particular learner, follow these steps:

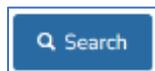Click *Learners* in the navigation menu on the Dashboard
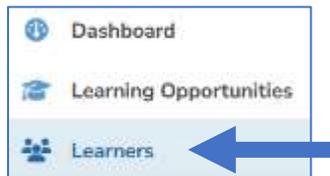
Click *Learner Comments*

Type the learner's name in the *Learner* search box and select it from the dropdown list (i.e. Charlie Brown)
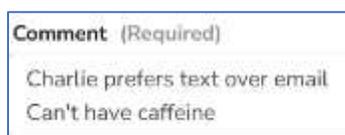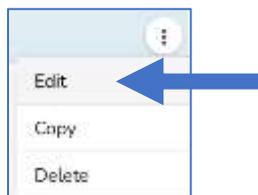

Click *Search*

The database will show all comments related to Charlie Brown

Click the 3 dots next to a comment and select *Edit* to see all the details

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To see the contents of **all** of the learner's comments, export the data to Excel. To do that:

Search for the learner following the steps above

Once you have a list of the learner's comments, click *Export* at the top of the page
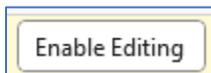

Name the file so that it makes sense to you (the database will suggest a title)

Click *Download*

The database will create an Excel file containing the filtered list of comments

The Excel file may open in protected mode. To work within the document, click *Enable Editing* at the top of the page

UID	Learner	Date Added	Comment
59535	Charlie Brown	2026-01-16	Charlie prefers text over emailCan't have caffeine
59536	Charlie Brown	2026-01-09	Charlie travels from out of town so may not get to class on bad weather days.

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