

From the AHA PAM

Instructor Records Transfer

Instructor status may be freely transferred from one TC to another upon the instructor's request.

Records must be transferred as requested, and the original TC must also retain copies for the required 3-year period to document training activities through the TC.

The original TC is required to notify the instructor of the process as listed below and to send whatever is on file in the instructor records.

Instructor records may not be sent to individual instructors.

The steps to transfer Instructor records from one TC to another are as follows:

1. Instructor completes an **Instructor Records Transfer Request**, located on atlas.heart.org.
2. The TCC of the **TC where the instructor is transferring to** signs the request and sends it to the instructor's original TC. **Alternatively**, the instructor may send the request to the original TC.
3. The **original TC sends** complete, up-to-date, instructor records, or a list of all courses taught to the other TC within 30 calendar days after receiving the Instructor Records Transfer Request.
 - Instructor records to include:
 - Instructor/TF Candidate Applications for all instructors aligned with that TC
 - Instructor Records Transfer Requests
 - Instructor Essentials Course Completion Notice to Primary TC
 - Documentation of administrative or disciplinary actions taken
 - Initial application form
 - Course monitoring
 - Renewal Forms
 - Course Rosters (within the 3-year retention window for instructor records)
 - Instructor/TF Monitor Forms
 - Instructor /TF Renewal Checklists
 - Copies or originals are acceptable.
4. Once **original TC** has sent requested instructor files, **the accepting TC must verify that the instructor has been removed from the original TC Instructor List on Atlas**. **The accepting TC** will need to advise the instructor on how to complete alignment with his or her center on Atlas website.
5. Upon verifying receipt of instructor records, and that the instructor has completed all necessary steps to hold current instructor status, **the new TC** accepts the instructor for listing on Atlas. At this time, **the new TC** must obtain the instructor card issued by the original TC and **issue a new card for the instructor under new TC name**.
6. For an instructor eCard, **the original issuing Training Center** should reach out to the AHA via email at Atlas.support@heart.org to have the **original instructor eCard deactivated**. The following information is required to deactivate the instructor eCard:
 - Instructor First and Last Name
 - Instructor Email (the email associated with the eCard)
 - Instructor ID Number
 - Specific card to deactivate
 - Reason for request
7. Once an instructor card is deactivated, that action cannot be reversed
8. The deactivated Instructor eCard will not be returned to the Training Center's eCard inventory
9. **Accepting TC must**
 - Complete a skills test
 - Conduct course monitoring
 - Verify required courses taught
 - Review any documentation related to administrative and disciplinary actions taken
 - Retain a copy of the Instructor Records Transfer Request