TRAIN Course Provider Reference Guide

Version 3.20 (03/04/16)
Public Health Foundation

Contents

About This Handbook

This guide for course providers explains how to list your courses on the TrainingFinder Real-time Affiliate Integrated Network (TRAIN), describes how to use TRAIN's most important course management features, and provides general information about TRAIN and its policies. The guide also contains course entry tips and lets you see at a glance the major course subject areas, target audiences, credit types, and public health competency fields that you can include in your course listing. Although most of this information is available online, many course providers find it useful to keep a print copy of this guide handy when entering courses. Future updates will be posted on the **TRAIN References** document board at https://www.train.org.

New Items in this release include:

- Page 26: Cloning sessions

What is TRAIN?

The TrainingFinder Real-time Affiliate Integrated Network (TRAIN) is the nation's premier learning resource for professionals who protect the public's health. TRAIN is comprised of the national TRAIN.org site and participating TRAIN affiliate sites. Affiliate sites are managed by many state public health agencies, academic partners, and others.

Because all TRAIN sites are connected, TRAIN users can access information about state, local, national, or international training available to them through any participating TRAIN site.

Learners can use TRAIN to:

- Search or browse the nationwide database for on-site or distance learning courses
- Sign up for emails about new courses
- Create a personal learning record of competency-based training
- Provide and view feedback about courses listed on the site
- Register online for many courses

Course Providers can use TRAIN to:

- Efficiently publicize courses to hundreds of thousands of TRAIN users through multiple websites – enter course information once (not dozens of times) and it is automatically available to all participating TRAIN sites
- Manage online registration and learner rosters
- Collect feedback from learners online
- Post course materials and discussion topics

TRAIN is a project of the Public Health Foundation with funding support from participating affiliate states, a grant from The Robert Wood Johnson Foundation, and a cooperative agreement with the Centers for Disease Control and Prevention.

Course Provider General Requirements

If your organization offers learning opportunities that meet our listing requirements, we encourage you to register to list your courses on the appropriate TRAIN site (see below).

From the home page, select your location from the drop-down menu, click the **Become a Course Provider** link (located under the CREATE ACCOUNT button) and follow the instructions to create an account. You will receive a notice of approval/disapproval via email, usually within three to five business days. Following registration and approval, you can submit course listings and take advantage of TRAIN's many course management features.

Choosing the appropriate TRAIN site for your course listings:

Course providers should list their courses on TRAIN through only one TRAIN site. Each course provider must choose to use either the national TRAIN.org site or one of the TRAIN affiliate sites based on the guidance below and as specified in our policies (p.96). Selecting one site over another does not affect the visibility of courses to users throughout all TRAIN sites. The selection only determines the site administrator who manages your TRAIN registration and course listings.

What geographic area is primarily served* by the course provider?	Appropriate TRAIN Site
A TRAIN affiliate state or communities within this state's jurisdiction (see https://www.train.org for a current list)	The corresponding TRAIN affiliate site
A national, international, or regional (multi-state) audience	The national TRAIN.org site
States and communities that are not within any TRAIN affiliate's jurisdiction	The national TRAIN.org site

* **Primarily served** means that most of the course provider's public health courses are designed for and restricted to the workforce of the jurisdiction listed.

How a Registered TRAIN User Becomes a Course Provider for an Affiliate Site

Any registered TRAIN user can easily request affiliate Course Provider status by following the steps below:

1. Log on to your TRAIN site.
2. Click the **My Account Link** in the TRAIN.

3. Scroll to the bottom of the page and click on **Request to Become a Course Provider**.
4. A new form will open at the bottom of the **My Account** page. Fill it in as completely as possible and click **Save**.
5. Your request will be reviewed by the Administrator in charge of Course Provider Approvals and you will be informed of their decision.

   Note: If you have the Course Provider Approver role for your state you may approve your own request.

How a Registered TRAIN User Becomes a National Course Provider

Any registered TRAIN user can request national Course Provider status by following these steps:

1. Log on at https://www.train.org.

   Note: You cannot register for national status through an affiliate site

2. Click the **My Account Link** located in the TRAIN banner.
3. Scroll to the bottom of the page and click on **Request to Become a Course Provider**.
4. A new form will open at the bottom of the **My Account** page. Fill it in as completely as possible and click **Save**.
5. Your request will be reviewed by the PHF Administrator and you will be informed of their decision.

Course Listing Requirements

The following are the minimum course listing requirements for TRAIN:

1. Courses must be designed for the continuing education and training of professionals who protect the public's health and be consistent with the target audiences in the TRAIN course search fields. Consumer-oriented health education classes and materials are not permitted.
2. Courses must be designed to build knowledge, skills, or competencies in one or more of the subject areas listed in the TRAIN course search fields.
3. Course materials must be designed for instructional (not reference) use by learners or trainers. Courses must be delivered in formats consistent with the formats in the TRAIN course search fields. Books, brochures, articles, palm cards, and other reference materials are not permitted unless continuing education credits are associated or the materials are designed as a self-study program.

Individual TRAIN affiliates are responsible for assuring that courses meet these minimum requirements. PHF will periodically review courses to ensure all affiliates approve courses consistent with these minimum requirements. Affiliates may apply additional state-specific standards to decide whether a course may be approved or viewed on their site

Recommendations

Based on recommendations and suggestions provided by TRAIN users and administrators, it is highly recommended for Course Providers to enter the following information into the Course Description field of the Course Wizard (outlined on pages 9-10):

1. Course Name
2. Course Duration (estimated)
3. Course Description (at least one paragraph)
4. Course Objectives
5. Instructor Bio
6. User Help Reminder (for online courses):
    a. Example: “If you are experiencing technical difficulties, please check your computer capability: select the Help tab in the TRAIN navigation bar, then select ‘Test Your Environment’ on the left-hand menu.”

Managing Courses via the Course Wizard

Entering a Course

1. Log on to your TRAIN site.
2. Click on the **Administration** tab, located on the **Navigation Tab** Bar.
3. Click **Courses**, from the menu on the left side of the page.
4. Click **Course List** – the course list will generally be displayed be default.
5. Click the **Add** button, on the right of the **Course List** header and below the displayed listing.

   Note: By default the course list page is broken up to display 20 courses on one page. To change this, use the dropdown menu on the course list page

6. The **Course Wizard** will guide you step-by-step through the process of setting up your course.

- Entering the **Description**

1. Enter **Course Title**, **Sponsor/Offerer** and select a course **Format**.
   a. Course **Formats** are classified in five ways:
      i. **Live Event:** the course will take place at a physical location. You will also need to set up **Sessions** for your course which define the date, time, location, etc.
      ii. **Physical Carrier:** the learner must order materials such as CD, DVD, etc. in order to complete the course.
      iii. **Online:** the course will be launched from TRAIN to your online course.
      iv. **Compilation:** the course will be a collection of other already-established courses within TRAIN. The user must complete each course within the Compilation in order to complete the Compilation Course. For more detail in the BLS courses, see the section below called Blended Learning Series.
      v. **Exercises:** Exercises are a new format of live event. Exercises allow administrators to assign *Universal Tasks* to a course which will define certain target capabilities and tasks. This format also allows administrators to assign

roles to the course. More info on assigning Universal Tasks and Roles can be found in the Course Wizard → Format Details (page 14) portion of this handbook as well as in the session portion of this handbook.

   b. Each type of format has several options available, such as **Workshop (Online)** versus **Workshop (Live Event)**. If you are unsure which format to choose for your course, please contact your affiliate administrator.
   c. After all required information has been entered into the appropriate fields click the **Next** or **Save & Finish Later** button to proceed.

2. By default, the **Active** checkbox is selected. The **Active** checkbox determines the availability of the course. If the box is unchecked, it will not be available for users.
   a. We strongly encourage you to pay close attention to the active status of your course. **When you submit a course for approval, it *must be active* to appear in the administrative approval queue.** The system will not send inactive courses for approval. More so, the active status of a course has a direct effect on user access. If the course is not active, users cannot access it.
3. If the course is to be part of a **Compilation** or **Blended Learning Series**, check the **Visible only in compilations like Blended Learning Series courses** box; or else, leave the box unchecked. By checking this box, users will **NOT** be able to find the course as an individual record within the Course Search. They will only be able to find the course by registering for the Compilation course.
4. If the course relates to a health care setting, check the **clinical** box; or else, leave it unchecked.
5. Courses can also be given an expiration date. If the course will no longer be available after a certain date, enter that date in the **Expiration Date** field.
   a. There is a calendar icon next to the **Expiration Date** field which, if accessed, can also be used to select the appropriate date.
6. Below the **Expiration Date** field, course providers can enter any **Special Notes** they might have concerning course availability.
   a. Once the necessary data has been entered into the appropriate fields, click the **Next** or **Save & Finish Later** Button.
7. It is required that a description of the course being offered be entered into the **Course Description** field.
   a. After a description has been entered, click the **Next** or **Save & Finish Later** button.
8. Course providers must select at least one **Subject Area.**
   a. After course subjects have been identified, click the **Next** or **Save & Finish Later** button.
9. At least one **Audience** type must be chosen.
   a. If applicable, course providers can select up to 6 audience **Background Roles.**
   b. Once **Audience** and **Background** have been chosen, click the **Next** button.

10. Next, course provider needs to choose at least one course **Language.**
    a. Click the **Next** or **Save & Finish Later** button.

- Entering **Credit Types, Certificates** and **Accreditations**

1. If any type of **Credit** is applicable for this course, click the **New Credit** button; if not, click the **Next** or **Save & Finish Later** button.
    a. To create a course **Credit**, select a **Credit Type** and enter a **Credit Amount**.
        i. To return to the wizard without adding a **Credit**, click the **Cancel** button.
    b. Then click the **Add** button.
    c. If the course has multiple **Credits** available, repeat the steps above; or else, click the **Next** or **Save & Finish Later** button.
2. Certificates are designed to allow administrators the ability to provide their users with a printable certificate verifying the learner's course attendance.
    a. To assign a certificate, go to the **Certificates** portion of the **Course Edit Wizard**, click the **Assign Certificates** button, and select from the radio buttons atop the page which certificates to display in the dropdown menu titled **Certificate Type**. Your options include:
        i. **Show My Personal Certificates** – this will cause only certificates you have created to display.
        ii. **Show All Public Certificates** – this will display all public certificates created both by you and other TRAIN certificate administrators.
    b. After you have selected from the radio buttons which certificates to display, you will need to choose a certificate from the **Certificate Type** drop-down menu.
        i. You may define a **date range** for the certificate.
            1. The certificate date range pertains to the user completion date for the course.
            2. If the user's completion date for the course falls within the date range, that user will receive the selected certificate.
            3. Note that start and end date are not required. If no date is provided for these values, the date range on the certificate is considered "open ended" and users will receive the certificate no matter what their completion date is.
            4. Changes to start and end dates for the certificate are not retroactive. If a user has already received a certificate, changing the date range will not remove that certificate.
        ii. You may define a **credit type** for the certificate.
            1. The credit type pertains to the credit selection the user makes when first registering for the course.

        2. If the certificate is assigned to the same credit type that the user has selected for their registration, they will receive the corresponding certificate.
    iii. If provided, both date range and credit type requirements must be met for the user to receive the certificate.
  c. You also have the option to set the certificate as **Automatic** or **Manual**. Automatic certificates will be available for the user immediately after they complete a course; whereas manual certificates will require the appropriate administrator to manually verify the learner's completion of the course before the certificate will be available.
    i. **Automatic** certificates are broken down even further into certificates that will require a passing score on a course assessment, and those which do not require a passing score.
        1. To create an automatic certificate with a required passing score, select the **Automatic** radio button below the **Certificate Type** drop-down; then, select the checkbox below labeled **Learners must successfully PASS any Post-Assessment**. The passing score required to obtain the certificate is set in the **Assessment** interface.
        2. To create a certificate with no passing score required, simply select the **Automatic** radio button.
    ii. To create a manual certificate that will require administrative verification prior to user availability, simply select the **Manual** radio button.
  d. Use the standard **Course Edit Wizard** navigation button at the bottom of the page to save, advance or cancel your progress in the wizard.
3. To assign an **Accreditation** to a course:
  a. Enter the accreditations title in the **Accreditations** field.
  b. Click **Assign Accreditations**
  c. Select the **Groups** and **Accreditation** you wish to assign to that course (if the accreditation is newly created, it might be necessary to await approval from your state administrator).
  d. Lastly, click **Save** and **Next** or **Save & Finish Later** button.

Note: When a course provider assigns an accreditation to a course, the assignment **may require approval**. This requirement is controlled by the groups at which the accreditation itself has been made visible. The accreditation assignment will not require approval if it is made at a group level at which the accreditation itself has also been made visible. When an accreditation assignment requires approval, it may be approved by any administrator who has the Accreditation Manager role at the group at which the accreditation is visible, or any higher group in the grouping structure. (Note: *This will not necessarily* *include administrators in the group at which the accreditation assignment was requested*. That group assignment identifies the groups whose users will see the accreditation listed in the Course Details page).

- Entering Course **Availability** and **Custom Attributes**

1. Select **Groups** for course **Availability**. The availability of your course determines not only who has access to your course but who will be in charge of approving your course. If you submit a course to the National audience (by checking **National**) PHF will be in charge of approving your course. If you select a state or state sub-group the State Administrator will be in charge of the approving your course. Remember that availability carries down through the tree – if you wish your course to be available to an entire state you only need to select the state group. You do **not** need to select every group individually.
    a. Click **Next** or **Save & Finish Later**.

- Entering **Skill Level** and **Competencies**

1. Select a **Skill Level**. If you are unsure which skill level to select, choose one and the screen will refresh with a detailed explanation.
    a. **Introductory -** Course provides an introductory topic overview that is appropriate for general or multiple audiences. Typically less than 90 minutes and may offer self-testing of knowledge. It is suggested that a maximum of 10 core competencies be assigned for this level course. Assignment of competencies is optional, and assignment at the domain level ("within domain") is permitted.
    b. **Intermediate -** Course provides comprehensive information or skills appropriate for specific job duties of the target audience (e.g., nurses, health educators). This course may provide practice-related exercises and simulations. This intermediate course is typically 90 minutes to eight hours in length. Self-testing or observational feedback must be offered to evaluate skill development. For each competency assigned the general expectation is for about 90 minutes of course content to be covered
    c. **Advanced -** Course provides intensive instruction, reinforcement of skills, and evaluation against an observable performance standard. Course provides practice-related exercises and simulations. A graded exam, practice, or drill must be offered16 to verify skills and knowledge learned in the course. This course typically ranges from eight hours minimum to a semester or more in length. This course is geared towards building proficiency and may be part of a larger curriculum with pre-requisites. For each competency assigned the general expectation is for approximately eight hours of course content to be covered. A maximum of five competencies can be assigned for this level course. Assignment of individual competencies, as appropriate, is required for this level of course.
2. If competencies are applicable, select your competencies.
    a. Select Competency Set

b. Select any applicable competencies. Click **Next**.
c. If any additional restrictions/instructions apply select **Yes** and **Next.** You may then enter any restrictions that may apply. Click **Next** and you may enter any Additional Provider Instructions that may apply.
d. Some competencies, such as MRC are only available for their corresponding subgroups.
e. Click **Next** or **Save & Finish Later**.

- Entering Additional **Registration Restrictions** and **Registration Notifications**

1. To add additional **Registration Restrictions** select **Yes**; if there are no additional **Registration Restrictions**, select **No**.
    a. Click **Next** or **Save & Finish Later**.
    b. If there are restrictions, list them in the **Registration Restriction** field.
    c. Click **Next** or **Save & Finish Later**.
2. To include an additional attached document to course details page (available only after the user registers):
    a. Click **Browse**, locate the file and click **Upload**.
    b. Click **Next** or **Save & Finish Later**.

- Entering **Approval** and **Custom User Information**

1. If the course requires course provider **Approval**, select **Yes**; if not, select **No**. Approving requests for registration is covered later in this document.
2. If the course will have a registration code, select the option **Users have to provide a code to register.**
    a. If you select this option, you will need to also define the code that users must enter. Enter this code carefully. When a learner registers for the course, they will need to enter the code exactly as you have.
    b. The registration code will still be required even if the learner is only adding their name to a waitlist.
    c. The code can be changed once entered, although this might cause confusion amongst your learners.
1. If you would like to collect **Custom User Information** select **Yes**; if not, select **No**.
    a. Custom User Information can be any information you wish to collect. You must enter the question that will be presented to the user and state whether or not the collected information is mandatory. Custom User Information is viewed through the Course Roster Export.
    b. Click **Next** or **Save & Finish Later**.

c. Enter required information into the **Custom Information Comments** field.
d. Click **Next** or **Save & Finish Later**.

- Entering Course **<u>Prerequisites</u>**

1. To add **Prerequisites** to a course:
   a. Click **New Prerequisite**.
   b. Search for the course that is the prerequisite for this course.
   c. Check the box to the left of the course that is the prerequisite for this course.
   d. Click **Link Select Courses**, or **Search More** to add additional prerequisites.
   e. Click **Back** to return to the course wizard.
   f. If only one prerequisite is required, select **One Prerequisite out of the listed courses**; if all prerequisites are required, select **All Listed Prerequisites**.
   g. Click **Next** or **Save & Finish Later**.

- Entering a Course **<u>Contact</u>**

2. Enter at least one **Contact** for this course.
   a. Click **New Contact** and enter the contact info.
   b. Click **Add** to create the contact.
   c. Click **Next** or **Save & Finish Later**.

- Entering **<u>Review Notification</u>** settings

1. To enter a **Review Notification**:
   a. Click **New Email**.
   b. Enter the email address to where review notifications should be sent.
   c. Click **Add**.
   d. Click **Next** or **Save & Finish Later**.
3. If you would like to prompt users to submit a course rating, simply check the ‘Prompt users who complete this course to submit a course rating option’ on this page. When a user completes your course, they will be automatically prompted to submit a course review.

- Entering Course **<u>Availability</u>** and **<u>Custom Attributes</u>**

1. If the course has applicable **Custom Attributes**, such as MRC competencies, select the attribute name from the ‘Please choose a category of additional course attributes’ dropdown menu.
   a. One point of clarification about the ‘Virginia Course Category’ attribute. This attribute needs to be assigned to *all* courses that will be available to VA users, based on a requirement by the Virginia Department of Health. This includes all national level courses. Therefore, when entering a VA or National level course, please select a ‘Virginia Course

Category' attribute. If you have questions about which attribute to pick, please contact the VA-TRAIN administrator. The TRAIN Support Desk will not be able to describe or recommend what attribute to pick.

   b. The option also exists to create your own custom course attributes and to list these attributes as calendar and course search filters. Users can then filter their course lists as per these custom attributes. If you would like to add a custom course attribute, please contact your state administrator.
   c. Cl**ick Next or Save & Finish Later**.

- Entering **Assessments and Evaluations**
   a. Assessments and evaluations now reside within the course and conference wizards. For more details are entering an assessment or evaluation, please see the evaluations and assessments section below (page 51).
- Entering Course **Format Details**

1. **Format Details**
   a. Formatting details can vary greatly depending the type and format of the course.
   b. The first formatting detail is to determine the course **Cost** and enter it in the **Cost** field.
   c. Click **Next** or **Save & Finish Later**.
   d. For live events, **Registration Outside of TRAIN** and **Sessions** will have to be determined; as well, a session will need to be created for the live course. For more info on creating live sessions, please see the 'Managing Sessions' section below.
      i. To **Require Registration Outside of TRAIN**, simply select the box indicating as such and enter the **URL** or where registration is required.
      ii. Click **Next** or **Save & Finish Later**.
      iii. To create **Sessions**, click **Add Session** and enter the necessary session info.
      iv. Click **Next** or **Save & Finish Later.**
   e. For live courses and exercise courses, the **Format Details** portion of the wizard includes adding at least one session for the course. This is accomplished in the Format Details → Sessions portion of the course add/edit wizard, via the **Add Session** button (see the sessions portion of this handbook for more info on adding sessions). Once sessions are added for the course, those sessions appear under the Course Details → Sessions, portion of the course add/edit wizard.

      Additionally, if the course is an Exercise, administrators have the option to add Universal Tasks. To add a Universal Task to the course, Select the **Universal Tasks** link to the left or select **Next** from the sessions portion of the wizard. Then, select the appropriate item from the 'Choose Target Compatibility' menu. This will cause a list of associated tasks to load on the bottom half of the screen.

Use the **Add** button next to each task to add it to the course. The item should now appear at the top of the page in the ‘Selected Universal Tasks’ list. There is no limit to the number of tasks assigned to a course. These tasks are available in Ad-Hoc reporting; they are also displayed on the ‘Course Details’ page for users to see when they register for the course; however, they are not available in the search feature.

f. For online courses, **Online Course Details** need to be determined and the **SCORM** upload wizard will need to be run (if applicable).
    i. Under **Online Course Details**, enter the URL of the course, or SCORM player through which the course will run.
    ii. Click **Next** or **Save & Finish Later**.
    iii. To upload a SCORM course, select **Yes**, this course is SCORM compliant and run the SCORM upload wizard.
    iv. Click **Next** or **Save & Finish Later**.

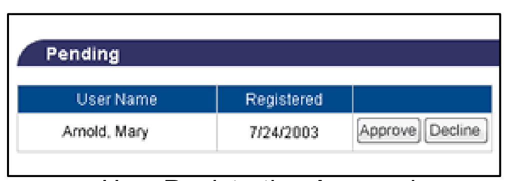
- <u>**Approving**</u> your course

1. To **Submit Course for Approval**:
    a. Select **Yes** and click **Finish**.
2. You will then receive a confirmation email notifying you of the status of your course.
   Please note that the most common course error is incorrect visibility. It is worth double-checking you course’s availability and comparing it with the grouping location of the users you intend to reach.

Approving Course Registrations

Any course may be set up so that Course Providers must approve all user registrations. When this option is selected, any user who wishes to take the course must Request Approval for registration. When the request is made, the Course Provider must decide whether to approve or decline the request. To do so:

1. Click on the **Approval Items** within the action items section of your dashboard; you can also click the **Administration** tab, followed by **Approvals** from the menu on the left hand of the page.
2. Click on the item name for which the user is seeking approval.



User Registration Approval

3. Select either **Approve** or **Decline** next to the user’s name. The user will be automatically informed by email.
4. Click **Back** to return to the pending approval list.

Modifying a Course

1. Log on to your TRAIN site.
2. Click on the **Administration** tab.
3. Click **Courses**, which appears in the left-side list menu.
4. Click **Course List**.
5. Locate the course that you wish to edit and click the pencil icon next to it.

   Note: Don't see your course? Check to make sure you have selected the correct filtering. You may filter the courses you view by their status – Complete, Incomplete, Approved, etc. Put a checkmark in the box of all types you wish to view, and click "Refresh."

6. Make the necessary changes through the Course Wizard and click **Save**.

Cloning a Course

If your course exists in different formats you will need to set up a "parent" course and then clone it using the clone icon. All information in the cloned course will be the same, except for the new format or other information you change. To clone a course, first enter the information as you would for any course. Then you will create a clone "child" by following these steps:

1. Click on the **Administration** tab.
2. Click **Courses**, which appears in the menu on the left side of the page.
3. Click **Course List**.
4. Locate the course you wish to clone.
5. Click on the clone icon that appears in between the pencil icon and the schedule icon.
6. Make all the necessary changes for your cloned course.
7. Click **Save and Back** to save your cloned course.

Clone Icon

Note: You may clone the "parent" course only. The clone icon does not appear on any of the "child" courses

How to Activate or Deactivate a Course

1. Log on to your TRAIN site.
2. Click on the **Administration** tab.
3. Click **Courses**, which appears in the menu on the left-hand side of the page.
4. Locate the course that you wish to activate or deactivate and click the pencil icon.
5. On the **Active/Visible/Clinical** page, check the **Active** box if you wish to activate the course or uncheck the **Active** box if you wish to deactivate the course.
6. Click **Save and Back** to save your changes.

Blended Learning Series

What is Blended Learning?

Blended Learning allows a Course Provider to combine a number of courses into one Course Listing. All of the individual courses must be completed for the Blended Learning Series (BLS) to be considered complete. Blended Learning is implemented by adding a new course and setting the Course Type as Blended Learning Series and then adding components to the course.

Creating a New Blended Learning Series

To create a Blended Learning Series:

1. Log into your TRAIN portal.
2. Click “Administration” from the top navigation.
3. Click “Courses” in the left-hand “Manage” navigation, then click “Course List” (which will appear directly below “Courses” when the page reloads).
4. Click “Add.”
5. Fill out the course information as normal, but be sure to choose **“Compilation / Blended Learning Series”** in the “Select Format” box on the first tab of the New Course Wizard.
6. Once “Blended Learning Series” is selected as the course format, additional options should be considered:
    a. On the Active/Visible/Clinical tab: It is possible to make the BLS appear only within another Blended Learning Series and not within the standard results from a Course Search. This will prevent users from finding the BLS when performing a standard Course Search. Click the checkbox next to “Visible only in compilations like Blended Learning Series courses” to apply. On the BLS Components tab – check the box “Show components only after a user registers” in order to prevent users from knowing which

courses are assigned to the Learning Series until after they have registered. ***Please note that when "Visible only in compilations like Blended Learning Series courses" is selected, although users will not see these BLS component courses when performing a Course Search, it does NOT prevent the user from, once finding the BLS, registering for only a single component of the BLS.**

b. Blended Learning Courses are built on the BLS Components tab by adding groups and subgroups (called sections) and then tying courses to these sections. It is possible to build a BLS which contains all courses in a single section by simply adding courses (described below) to the BLS.

7. To add sections:
   - **a.** Highlight a section and click "Add Section" to add a sub-group to the selection.
   - **b.** Enter the name of the new section.
   - **c.** To restrict the user from taking more than one course in the section check the box next to "Learner is required to take only one course out of this section of courses."
   - **d.** To force the user to take the courses within the section in the order they are listed check the box next to "Courses must be taken in order defined in the section."
   - **e.** Continue as necessary until the structure is complete.
8. To add courses:
   - **a.** Highlight a section to which you would like to add a course and click "Add Course." If your BLS will not use sections, simply click "Add Course."
   - **b.** Select if a New Course is to be added or if an Existing Course is to be added.
   - **c.** If "New Courses" is selected, the Add New Course module will be displayed. Enter all course information as normal and save the course. The course will be added to the Blended Learning Course once it has been saved.
   - **d.** If "Add Exiting Course" is selected, you may search for the Course(s) either via the Keyword search by entering the keyword in the first box, or via Course ID by entering the Course ID in the second box, and clicking "Search."
   - **e.** Place a check next to the name of the courses in the resulting course list and click "Link Selected Courses." If your search was unsuccessful, you may alternately click the "Back" button to continue adding courses and sections to the BLS or you may perform another search.
   - **f.** These courses will now be displayed under the selection to which they are assigned.
9. To edit a section or a course, highlight the section/course name by clicking it, and then click the pencil icon to the right of the section/course listing.
10. To delete a section or a course highlight the name of the section or course and click the blue 'x' icon.
11. To move a section or course up or down in the listing, highlight the name and click the up/down arrow icons.
12. Once your courses and sections are set as needed, there are two additional options to consider: 'Show components only after a user registers' and 'Complete BLS course when all of its components are completed'.
    - **a.** If the course has the 'Show components only after a user registers' option turned on, users will not be able to see the courses and sections of the BLS until after they are registered for the BLS.

b. If the ‘Complete BLS course when all of its components are completed’ option is turned on, the BLS course will automatically update to complete once all courses within the BLS are completed. If this option is not selected, users or administrators will need to update the BLS course to complete manually.

13. Click “Save” to complete the Blended Learning Course.

Managing Sessions

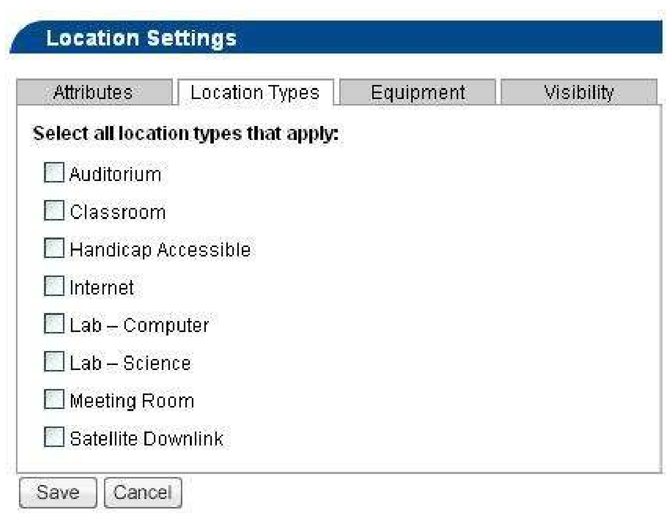
Note: Be aware that sessions can only be created for "Live Event" Course Types and "Exercise" Course Types, where the format is a Conference, or Webcast, etc. You may not create sessions for courses where Type is of "Physical Carrier," such as Audio Tape or CD-ROM. It is best to set up Session Locations and Instructors before moving on to Creating Sessions for any course. You will need them in the system to correctly establish any course sessions.

Note: There are multiple ways to locate courses and sessions for administration. You do not necessarily need to use the 'Administration' tab. If you prefer, some alternative methods include: Search by Course ID on the TRAIN Home page; Or, under the Course Search tab, click the link to show only your affiliate courses. In either case, in the resulting list of courses, locate the 'clock' icon next to the appropriate course to access the session management for that course.

Note: Sessions cannot be added to a course that has expired or will expire before the date of the session. If you course is set to expire, you may need to edit the expiration date of the course in the Active/Visible/Clinical portion of the Course Wizard Description.

Setting up Session Locations

1. Log on to your TRAIN site.
2. Click **Administration**.
3. Click **Courses** the left side menu.
4. Click **Session Locations** on the left side menu.
5. Click **Add**.
6. Fill out the information under each of the tabs as completely as you can. Much of this information will be communicated to learners and will help them find course locations.
7. Click **Save**.



Location Settings

Notes on the Individual Location Entry Tabs

Below are notes and tips to assist with course entry, organized by each of the major tabs on the location entry screen. Fill out all fields as completely as you can.

Attributes Tab:

- **Location Name:** A general name of the given location. Example: North Business Park.
- **Building:** The name or number of the specific building in which the training will take place.
- **Room:** The specific room number in the building that the training will take place.
- **Address 1:** The first line of the building's address.
- **Address 2:** Any additional address information.
- **City / Township / Town:** Enter your choice of the City, the Township, or the Town.
- **State:** Select the correct state from the dropdown selection field.
- **Zip:** Enter the location zip or postal code.
- **Country:** Select the correct country from the drop-down selection field.
- **Phone at Site:** If there is an available phone for learners to call the location with, enter the number here.
- **Contact Name:** This should be the name of someone available to take any questions about the specific location.
- **Contact email:** Enter the location contact's email.
- **Contact Phone:** Enter the location contact's phone.
- **Directions:** Any information about the location, including geographical directions, security procedures, etc.
- **Active:** Locations are only visible and usable when they are **Active**. If you ever wish to remove a location from the system, remove the check from this **Active** checkbox.

Location Types Tab:

- **Select all location types that apply:** Add a check next to all types that accurately describe the training location.

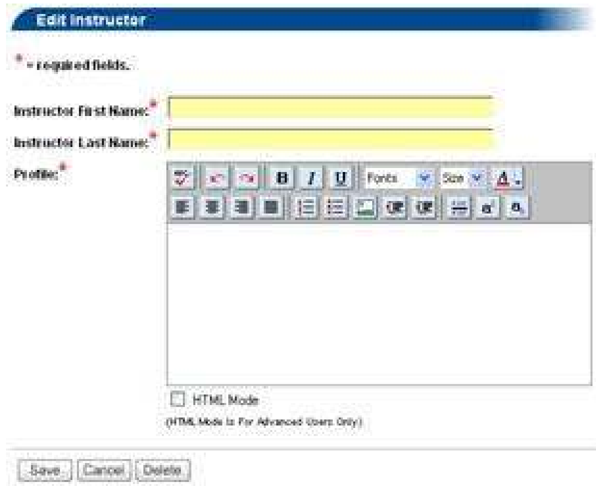
Equipment Tab:

- **Select all equipment that applies:** Add a check next to all training equipment that is available for use at the location.

Visibility Tab:

- **Select Visibility:** Add a check next to all groups that you wish to grant access to this location. Checking one group will also give access to all subgroups of the checked group.

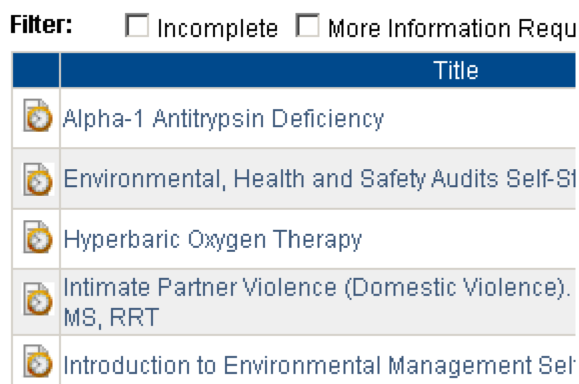
Setting up Session Instructors



Instructors Add/Edit

1. Log on to your TRAIN site.
2. Click **Administration**.
3. Click **Courses** the left side menu.
4. Click **Instructors** on the left side menu.
5. Click **Add**.
6. Fill in the required fields.
7. Click **Save**.

Adding Session



Course List Showing Session Icons

1. Log on to your TRAIN site.
2. Click **Administration**.
3. Click **Courses** on the left side.
4. Locate the course for which you wish to set up sessions.
5. Click on the clock icon to the left of the course title.
6. Click the **Add** button to the right of the title bar.
7. Select the session type from the list.

Note: Where's the clock? Be aware that sessions can only be created for "Live Event" Course Types, where the format is a Conference, or Webcast, etc. You may not create sessions for courses where Type is of "Physical Carrier", such as Audio Tape or CD-Rom.

<u>Directions for each of the options are on the following pages.</u>

Cloning Sessions

1. Clone a session by clicking the clone icon next to the appropriate session
2. This creates a copy of the session, but without any dates and times. You will need to provide dates and times for the cloned
3. All other details of the session are copied from the parent session. You may change those details like a normal session, but it is not required.

Session Types

The first thing you must do when adding a session is determine the Session Type. There are five session types in TRAIN:

- Single session / Single Location (i.e. one time lectures and webcasts)

- Single Event / Multiple Locations (i.e. satellite downlinks)
- Course-Based Learning (i.e. one course with multiple meeting times and dates)
- Master Broadcast Session
- Broadcast Session

A single session / single location is for setting up a one-time only schedule that will take place in one location.

If your session will be a one-time event, but it will take place at multiple locations, then choose **Single Event / Multiple Locations**.

If your session will have multiple schedules that span over a longer period of time, choose **Course-Based Learning**. This will allow you to create multiple schedules, each schedule having its own date and time.

If you are establishing a session and you do not need or want to set up a specific location – a satellite broadcast, for example – then you may choose **Master Broadcast Session**. You will be able to establish all the relevant details of the session without selecting a location. Other Session Administrators who have access to your course will then be able to establish their own locations for the session.

To set up a Broadcast Session of any of the available Master Sessions, you should choose **Broadcast Session**. You will then be presented with a drop-down list of available Master Sessions. This option will only be available if there is a Master Session already established for the course.

Roles Tab for 'Exercise' Format Courses

If your course is an Exercise format course, there is now an extra tab in the session add/edit interface. This is the **Roles** tab. *It is only applicable for Exercises*.

The **Roles** tab allows administrators to set a more specific version of the session seat limit (i.e., per *role*). By default, there are listed seven roles with unlimited seats per. The idea here is that administrators can designate what roles and how many of each role (per user) can attend the course. The seven default roles are:

- Controller
- Evaluator
- Facilitator
- Observer
- Planner
- Player
- Simulator

To add a role:

1. Access the edit interface for the appropriate session.
2. Select the **Roles** tab for that session.
3. Click the **Add** button on the **Roles** tab.
4. Enter a name for the role in the 'Role Name' field.
5. Enter the number of learners who may select this role and attend the session in the 'Role Limit' field. If there is no limit on the number of learners who may select this role and attend the session, then leave this field blank.
6. Once the info is entered, click the **Save** icon ( ) in row with the new role.

To remove a role:

Note: it is possible to remove the default roles.

1. Access the edit interface for the appropriate session.
2. Select the **Roles** tab for that session.
3. Click the **Delete** icon ( ) next to the role you wish to remove.

To edit an existing role:

1. Access the edit interface for the appropriate session.
2. Select the **Roles** tab for that session.
3. Click the **Edit** icon ( ). This will activate the role name and limit fields.
4. Adjust as needed.
5. Click the **Save** icon ( ) in row with the adjusted role.

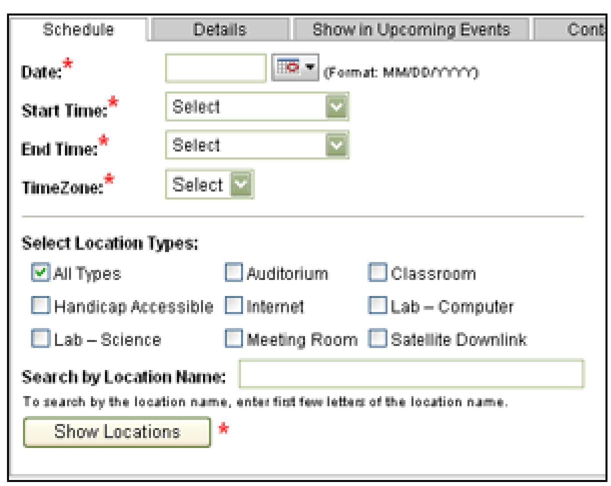
To use the roles properly, you will need to ensure that the *total* number of seats allowed by the roles (i.e., role limits), is enough to accommodate all expected registrations for the course. When a user registers for the Exercise, they will be asked to select their role. Users can only select one role, but that selection will count against that role's *limit*.

Note: **if your session seat limit is set higher than the total sum of your role limits, you will run out of seats for the session before the seat limit is reached.**

Single Session / Single Location

This option is best for one-time events that will take place in one location such as live lectures. We also recommend this option for webcasts and for audio conferences. For the purposes of setting up sessions, we consider the Internet or the telephone as single locations. You may also establish multiple schedules for this session.

1. Enter the date, start time, and end time of the event.



Scheduling a Single Session

2. Select the appropriate Time Zone from the drop down menu.
3. To select your location, click **Show Locations** and choose from the given list.
4. You may also filter the list by selecting specific Location Types or typing in a location name before clicking **Show Locations**.
5. Once the locations list has been populated, find the location you wish to use, and select the Radio Button next to the location name.
6. Click the **Details** tab to continue.
7. The **Active** checkbox must be checked for your session to be Live. If you wish to pull your session from public view, you may come here at any time to un-check the **Active** box.
8. To display the course in the Learning Calendar, place a check in the box next to **Show In Learning Calendar**. Not all affiliates have access to the Learning Calendar. If you have questions regarding your affiliate's status with the Learning Calendar, contact your local TRAIN Administrator.
9. Enter the description of your session in the **Description** box.
10. You may limit the number of attendees by filling in the **Attend Capacity** field.

Note: If you don't want to set a limit on the number of attendees, leave the number set at 0 (zero). The system will not apply restrictions on the number of attendees allowed to register for this session.

11. If you set an **Attend Capacity** you are able to allow Waitlist registration, which gives learners the option of adding themselves to a waitlist once the session registration is full.
12. You are able to limit the number of users who can add themselves to the waitlist by filling out the **Max Number People on the Wait List:** field.
13. If you would like to be able to manually add people from the Waitlist to the Course Roster above and beyond the seat-limit, check the **Allow Over-Register** checkbox.

Note: For more information on using and managing a waitlist, see the Course Roster section.

14. Seats Allocated provides you with the number of seats already claimed by users through the registration process.
15. Enter the registration deadline (optional).

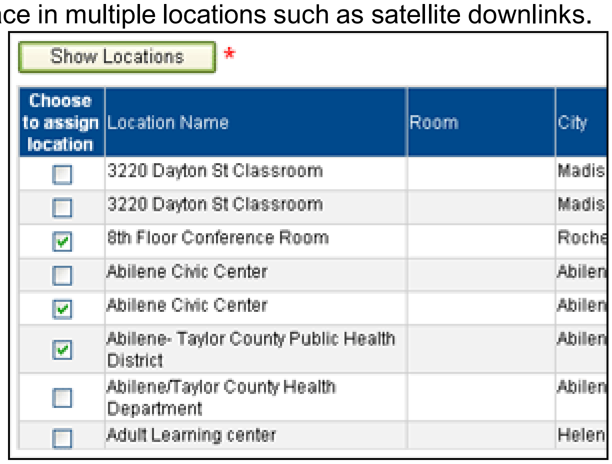
Note: If no registration deadline is entered, then learners may register for the session up through the session's end-time.

16. You must select at least one language.

17. If you know the instructor of your course, select the instructor’s name from the list.
18. Click the **Show in Upcoming Events** tab to continue.
19. If you would like the session to be displayed in the **Upcoming Events** column on the home, check the **Show in Upcoming Events** checkbox and then enter the dates it will be displayed. **Note: this feature will display your session on the TRAIN ‘Home’ page. It is an effective way to help users locate your course.**
20. Click the **Contacts** tab to continue.
21. If you wish to enter a session contact, click the **Add Session Contact** button.
22. The screen will refresh with a textbox for Name, Email, and Phone. Enter all of the information for your Session Contact, and click **Update** to save your changes.
23. Click the **Visibility** tab to continue.
24. Assign visibility to the groups you wish to have access to this session.
25. Click **Save**.

Single Session / Multiple Locations

This option is for one-time events that will take place in multiple locations such as satellite downlinks.



Selecting Multiple Locations

1. Enter the date, start time, and end time of the event.
2. Select the appropriate Time Zone from the drop down-menu.
3. To select your location, click **Show Locations** and choose from the given list.
4. You may also filter the list by selecting specific Location Types or typing in a location name before clicking **Show Locations**.
5. Once the Locations list has been populated, find the location you wish to use, and select the Radio Button next to the location name.
6. Click the **Details** tab to continue.
7. The **Active** checkbox must be checked for your session to be Live. To pull your session from public view, you may come here at any time to un-check the active box.
8. Enter the description of your session in the **Description** box.
9. You may limit the number of attendees by filling in the **Attend Capacity** field.

Note: If you don’t want to set a limit on the number of attendees, leave the number set at 0 (zero). The system will not apply restrictions on the number of attendees allowed to register for this session.

10. If you do set an **Attend Capacity** you may allow Waitlist registration, which will give users the option of adding themselves to a waitlist once the session registration is full.
11. You are able to limit the number of users who can add themselves to the waitlist by filling out the **Max Number People on the Wait List:** field.
12. If you would like to be able to manually add people from the Waitlist to the Course Roster above and beyond the seat-limit, check the **Allow Over-Register** checkbox.

Note: For more information on using and managing a waitlist, see the Course Roster section.

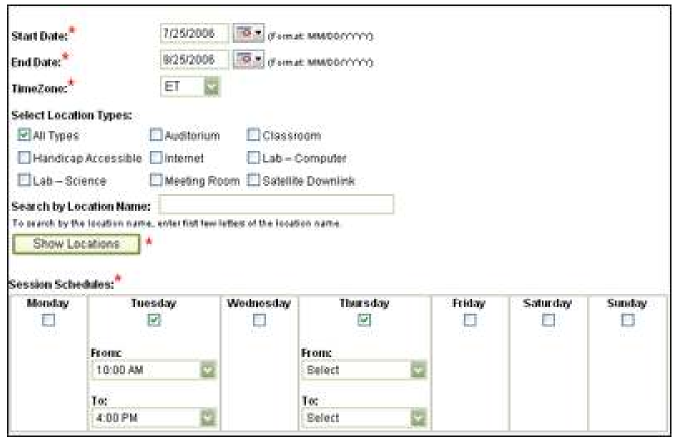
13. Seats Allocated simply provides you with the number of seats already claimed by users through the registration process.
14. Enter registration deadline (optional).

Note: If no registration deadline is entered, then by default learners may register for the session up through the end of the session's end-time.

15. You must select at least one language.
16. If you know the instructor of your course, select the instructor's name from the list.
17. Click the **Show in Upcoming Events** tab to continue.
18. If you would like the session to be displayed in the **Upcoming Events** column on the home, check the **Show in Upcoming Events** checkbox and then enter a From and To date that will define how long it is displayed.
19. Click the **Contacts** tab to continue.
20. If you wish to enter a session contact, click the **Add Session Contact** button.
21. The screen will refresh with a textbox for Name, Email, and Phone. Enter all of the information for your Session Contact, and then click **Update** to save your change.
22. Click the **Visibility** tab to continue.
23. Assign visibility to the Groups you wish to have access to this session.
24. Click **Save**.

Course-Based Learning

This option is used to set up courses with multiple meetings. These can either be consecutive days or periodic sessions (i.e., M-F next week or MWF every week for 2 months). You may set different start and end times for each meeting.



Scheduling Multiple Sessions

1. Enter the start time, and end time of the event.
2. Select the appropriate Time Zone from the drop-down menu.
3. To select your location, click **Show Locations** and choose from the given list.
4. You may also filter the list by selecting specific Location Types or typing in a location name before clicking **Show Locations**.
5. Once the Locations list has been populated, find the location you wish to use, and select the Radio Button next to the location name.
6. Place a checkbox under each day-of-the-week that will be a part of your session. For each day selected, you will need to select a start time and an end time.

   Note: If your schedules span multiple weeks, but not every week has the same schedules, you will be able to edit individual schedule times and delete any extra schedules after saving your initial entry.

7. Click the **Details** tab to continue.
8. The **Active** checkbox must be checked for your session to be Live. To pull your session from public view, you may come here at any time to un-check the **Active** box.
9. Enter the description of your session in the **Description** box.
10. You may limit the number of attendees by filling in the **Attend Capacity** field.

    Note: If you don't want to set a limit on the number of attendees, leave the number set at 0 (zero). The system will not apply restrictions on the number of attendees allowed to register for this session.

11. If you do set an **Attend Capacity** you are able to allow Waitlist registration, which will give users the option of adding themselves to a waitlist once the session registration is full.
12. You are able to limit the number of users who can add themselves to the waitlist by filling out the **Max Number People on the Wait List:** field.
13. If you would like to be able to manually add people from the Waitlist to the Course Roster above and beyond the seat-limit, check the **Allow Over-Register** checkbox.

Note: For more information on using and managing a waitlist, see the Course Roster section.

14. Seats Allocated provides you with the number of seats already claimed by users through the registration process.
15. Enter the registration deadline (optional).

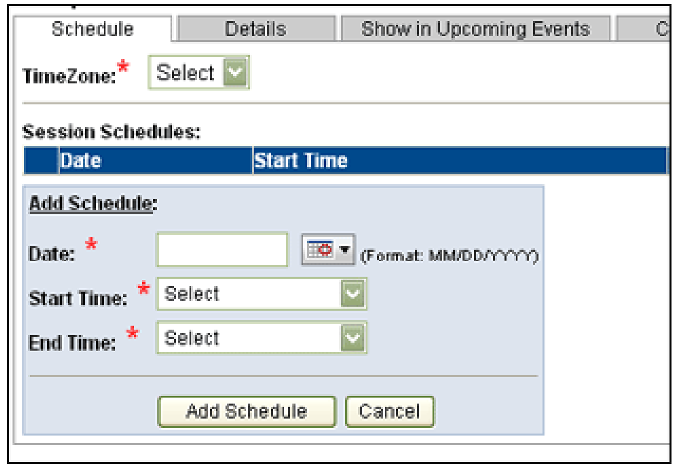
Note: If no registration deadline is entered, then by default learners may register for the session up through the end of the session's end-time.

16. You must select at least one language.
17. If you know the instructor of your course, select the instructor's name from the list.
18. Click the **Show in Upcoming Events** tab to continue.
19. If you would like the session to be displayed in the **Upcoming Events** column on the home, check the **Show in Upcoming Events** checkbox and select a From and To date.
20. Click the **Contacts** tab to continue.
21. If you do wish to enter a session contact, simply click the **Add Session Contact** button.
22. The screen will refresh with a textbox for Name, Email, and Phone. Enter all of the information for your Session Contact, and then click **Update** to save your changes.
23. Click the **Visibility** tab to continue.
24. Assign visibility to the groups you wish to have access to this session.
25. Click **Save**.

Master Broadcast Session

This option is suited events such as Satellite Broadcasts, where locations will not be defined, but will be established by other Session Managers who wish to participate in the Broadcast.

1. Select the appropriate Time Zone from the drop-down menu.
2. Click **Add New Schedule**.
3. Enter the date as well as the start time and end time of your schedule
4. Click **Add Schedule**.
5. Click the **Details** tab to continue
6. The **Active** checkbox must be checked for your session to be Live. If you wish to pull your session from public view, you may come here at any time to un-check the active box.



Setting up the Master Broadcast Schedule

7. Enter the description of your session in the **Description** box
8. You may limit the number of attendees by filling in the **Attend Capacity** field.

Note: If you don't want to set a limit on the number of attendees, leave the number set at 0 (zero). The system will not apply restrictions on the number of attendees allowed to register for this session.

9. If you do set an **Attend Capacity** you are able to allow Waitlist registration, which will give users the option of adding themselves to a waitlist once the session registration is full.
10. You are able to limit the number of users who can add themselves to the waitlist by filling out the **Max Number People on the Wait List:** field.
11. If you would like to be able to manually add people from the Waitlist to the Course Roster above and beyond the seat-limit, check the **Allow Over-Register** checkbox.

Note: For more information on using and managing a waitlist, see the Course Roster section.

12. Seats Allocated provides you with the number of seats already claimed by users through the registration process.
13. Enter the registration deadline (optional).

Note: If no registration deadline is entered, then by default learners may register for the session up through the end of the session's end-time.

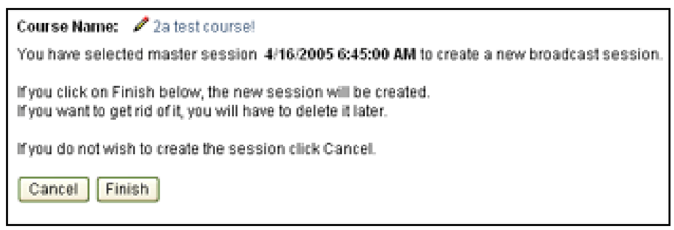
14. You must select at least one language.
15. If you know the instructor of your course, select the instructor's name from the list.

16. Click the **Show in Upcoming Events** tab to continue.
17. If you would like the session to be displayed in the **Upcoming Events** column on the home, check the **Show in Upcoming Events** checkbox and then enter a From and To date that will define how long it is displayed..
18. Click the **Contacts** tab to continue.
19. If you do wish to enter a session contact, simply click the **Add Session Contact** button.
20. The screen will refresh with a textbox for Name, Email, and Phone. Enter all of the information for your Session Contact, and then click **Update** to save your changes.
21. Click the **Visibility** tab to continue.
22. Assign visibility to the groups you wish to have access to this session.
23. Click **Save**.

Broadcast Session

This option will only be available if a Master Broadcast has already been established. You may also set up a Broadcast Session by clicking the **Add Broadcast Session** link beneath the title of an established Master Broadcast Session in the Sessions List.

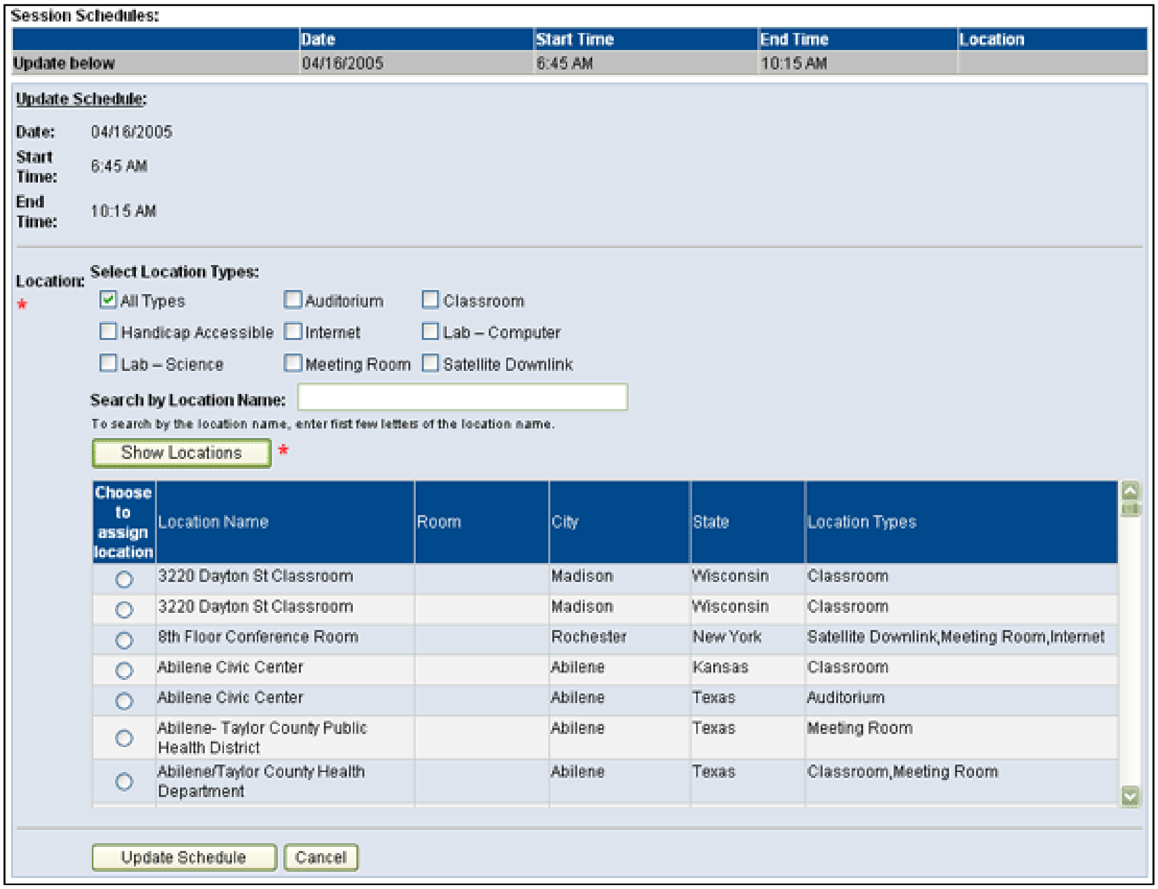
1. Select the Master Schedule for which you are setting up a Broadcast Session from the drop-down list and click **Next**.
2. Verify that you are setting up a Broadcast Session by clicking **Finish** on the next screen.



Verifying your Broadcast Session

3. You will be presented with a list of Master Broadcast Schedules – they are all without locations.
4. Click the pencil icon next to the schedule you wish to edit.
5. The Session Schedule Detail will open – select a location for the schedule, click **Show Locations** and select your location by clicking the Radio Button next to the location's name.

6. Location Type or type a location name before clicking **Show Locations.**



7. Filter the list by selecting Location Types or typing in a location name before clicking **Show Locations**.
8. Once you have selected your location, click **Update Schedule**.
9. Click the **Details** tab to continue.
10. The **Active** checkbox must be checked for your session to be Live. If you wish to pull your session from public view, you may come here at any time to un-check the **Active** box.
11. Enter the description of your session in the **Description** box.
12. You may limit the number of attendees by filling in the **Attend Capacity** field.

Note: If you don't want to set a limit on the number of attendees, leave the number set at 0 (zero). The system will not apply restrictions on the number of attendees allowed to register for this session.

13. If you do set an **Attend Capacity** you are able to allow Waitlist registration, which will give users the option of adding themselves to a waitlist once the session registration is full.

14. You are able to limit the number of users who can add themselves to the waitlist by filling out the **Max Number People on the Wait List:** field.
15. If you would like to be able to manually add people from the Waitlist to the Course Roster above and beyond the seat-limit, check the **Allow Over-Register** checkbox.

    Note: For more information on using and managing a waitlist, see the Course Roster section.

16. Seats Allocated simply provides you with the number of seats already claimed by users through the registration process.
17. Enter the registration deadline (optional).

    Note: If no registration deadline is entered, learners may register for the session up through the end of the session's end-time. If a registration deadline is entered, *and that date has passed*, learners that are on the Waitlist will not be added to the Course Roster automatically if a registered learner withdraws from the course. They will need to be manually added to the Course Roster.

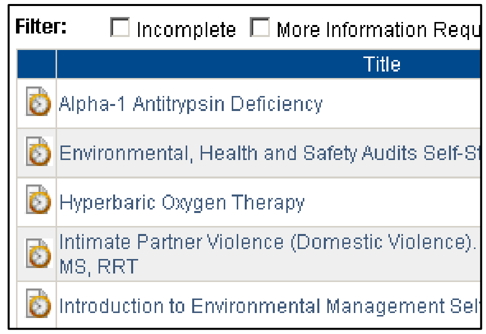
18. You must select at least one language.
19. If you know the instructor of your course, select the instructor's name from the list.
20. Click the **Show in Upcoming Events** tab to continue.
21. If you would like the session to be displayed in the **Upcoming Events** column on the home, check the **Show in Upcoming Events** checkbox and enter a From and To date that will define how long it is displayed.
22. Click the **Contacts** tab to continue.
23. If you do wish to enter a session contact, simply click the **Add Session Contact** button.
24. The screen will refresh with a textbox for Name, Email, and Phone. Enter all of the information for your Session Contact, and then click **Update** to save your changes.
25. Click the **Visibility** tab to continue.
26. Assign visibility to the Groups you wish to have access to this session.
27. Click **Save**.

Hint: We recommend controlling access to live training at the session level instead of the course level. This way, if a learner has an account outside the target grouping but they are interested in the course or perhaps should belong to the target grouping, they will know that the course is being offered and they will be able to see the contact information for the Course Provider in the course description

Editing a Session

Once you have established a session, you can edit the session at any time. To edit an existing Session:

1. Click **Administration**.
2. Click **Courses** on the left side.
3. Locate the course for which you wish to set up sessions.
4. Click on the clock icon to the left of the course title.
5. Click the pencil icon next to the session you wish to edit.
6. To view the Session Details as users see them, click the **Location Name**.
7. To edit the details of a Session Schedule, click the pencil icon next in the schedule row.
8. To add a new Schedule, click **Add New Schedule** and fill out the required fields.
9. After making all changes, click **Save** to finalize.



Course List Showing Session Icons

Note: If you edit the schedule of a session that has registered users you will be given the option of sending an email to all registered users after you click "Save." Be sure to edit the email to include the reasons for the schedule change. If you do not wish to send the email, simply un-check the "Send Email Upon Submit."

10. Click **Submit** to finalize your changes

Course Roster

Viewing the Course Roster

Every course in TRAIN maintains a roster of all learners who have registered for the course. As a Course Provider you must manage the roster for all courses that you post in TRAIN. The Course Roster not only allows you to view registrants, but it also provides you with a number of tools and functions that make managing your courses through TRAIN much easier and more productive.

In order to view the Course Roster:

1. Click on **Administration**.

2. Click on **Courses** and then **Course List** on the left-side list menu.
3. Click on the Roster Notebook icon.
4. If the Course is a Live-Event course containing Sessions, click on the appropriate session name.

   Note: You can only view rosters for courses or session that you created. You cannot view rosters for courses or sessions that another administrator created, even if the session is for a course you created.

Alternately, you may also reach the Course Roster by the following methods:

1. Locate your course in either the **Public Course Search**, or the **Administrative Course List**.
2. From the public search, click the **Course Title**. From the Administrative List, click the Session Clock icon.
3. From the public search, click the **Register Tab** followed by the **Details** button for your session. From the Administrative List, click the **Location Name** of your session.
4. From either method, you will now be viewing the **Session Details** page. Click the **View/Update the session roster** link, and you will be directed to the Session Roster.

The Course Roster displays a list of all users who have registered for the course, along with information regarding each user and their registration status.

By default, the list of users excludes those users who have been Withdrawn from the course. If you would like to view the Withdrawn users, uncheck the **Filter Withdrawn Users** checkbox, and the screen will refresh automatically to include them in the list of users. For each user you will be given: the user's name, the user's email address, the state the user belongs to, the date the user registered, the date the user completed the course/session (if applicable),and the status of the user's registration (In Progress, Completed, etc), the user's Pre and Post Assessment scores, where applicable. See Evaluations and Assessments for more information, the Credit Type – if any – the user selected, the status of their Verification and Their **Withdrawn** status. If a user is withdrawn, you may hover you mouse over the withdrawn checkbox and small "tip" box will show what date the user withdrew from the course. Additionally, the course roster export includes the date the registration is withdrawn as well as the user ID of the user who withdrew the registration.

Note: For more information on verifying users, see Verifying Learner Attendance.

Course Roster Functions

There are a number of tasks that course providers can complete from the Course Roster page, including verifying course registrations, adjusting the active status of course registrations and adding/editing test scores.

Both verifications and active statuses can now be controlled using the checkbox columns on the course roster. To verify a registration, check the box in the 'Verified' column in row with the appropriate users. If the registration is not complete (i.e., in some other status, such as 'in progress'), verifying it will also update it to complete.

The active status checkbox is also available on the course roster page. Deactivated registrations will be moved from the user's transcript to their archive file (accessible on the TRAIN 'Home' page). The registration will also no longer appear on the course roster by default (to see inactive registrations for a course, use the 'Active' filter at the top of the page).

The intention of the active checkbox on the course roster page is to allow administrators the ability to correct user errors. If a user mistakenly withdraws from a course or somehow corrupts their registrations, the administrator can make it inactive (and then if needed, batch register the user back into the course).

To add or edit a course score, simply click on the pencil icon in row with the appropriate registration. This will allow you to enter a points based or percentage score for the registration. This is available for both pre and post assessments and can be enacted by any administrator who otherwise has access to the course roster.

To change the credit type for a registration, select the correct credit type from the dropdown menu in the credit type column of the roster. Please note: to change credit types within the roster, the credit types must first be made available through the course wizard.

Course Provider Tools

In order to ease the burden of managing and running a course, TRAIN provides a number of new Course Provider tools. These tools are: Emailing Course Registrants, Creating Sign in Sheets, Creating Mailing Labels and Exporting Course Roster Data.

Emailing Course Registrants

The Course Roster allows you to email selected users or all of the users in the Course Roster.

- To send email to a few select users, first click the checkbox next to their email address and then click the **Send email to selected users** button.
- To send an email to all registered users, click the checkbox in the header of the Email column – this will automatically select all users – and then click the **Send email to selected users** button.
- The next screen will present you with an email form to complete, as well as a comprehensive list of all users you have selected. Once you have filled out your email, click **Send** and your email will be sent to all selected users.
- This option is now also available to send emails to all users on the Waitlist. The functionality for emailing users on the wait list is exactly the same as for the normal course roster. The buttons and checkboxes act as though they would on the course roster. However, it is important to note that you cannot send emails to users on the roster and on the wait list at the same time; this will require two separate actions.

Creating Sign-in Sheets

Clicking the **Sign in Sheet** button will provide you with a pre-formatted Excel spreadsheet that you can print out and use as a sign in sheet for all registered users coming to the session. It is recommended that you save the sign in sheet to your computer before making any modifications.

Creating Mailing Labels

The Course Roster allows you to create and print pre-formatted mailing labels for all the registered users. TRAIN provides you with three common formats for the labels: 5160, 5162, and 5163. Select your desired format and click the **Mailing Labels** button. TRAIN will then provide you with the mailing labels in .PDF format. It is recommended that you save the sign in sheet to your computer before printing. You are also able to create custom-sized mailing labels. For more information on this procedure, select **Other** from the label-size dropdown list and click the **Mailing Labels** button.

Exporting Course Roster Data

In order to download all of the course roster data into an excel spreadsheet:

1. Click the **Export** button.
2. Select which Course and which Session you wish to export.
3. Once you have made your selections, click **Create Report**. The resulting report will contain all user data for each registered user of the selected course and session.

The Waitlist

The Waitlist tab on the Course Roster will only be available if:

1. The Session is set up to allow Waitlist; and
2. There are users on the Waitlist.

For each user on the Waitlist you will be given: the user's Name, the user's Email, the state the user belongs to, the day they joined the waitlist (**Registered**), and Over-Register. This option is only available if the session was set up to allow over-register (see Adding/Editing sessions for more information). If over-register is allowed you may add any Waitlisted user to the live Course Roster – even if the course roster is full – by clicking the **Over Register** checkbox and then clicking the **Save** button. The user will then receive email notification that they have been registered for the course. You will also see the Withdrawn option. This option allows you to withdraw the user from the Waitlist, and remove their request for registration. To Withdraw a user, click the checkbox in the Withdrawn column and click **Save**.

There are two options for processing newly available seats. If a waitlist exists, you can set the list for auto registration. When this option is on, the next user "in line" on the waitlist is automatically registered for the course when a seat becomes available. An email is sent to that user letting them know of the change in registration status.

Alternatively, Course Providers may use the default waitlist function. If a waitlist exists and no auto registration option is selected, when a seat becomes available for the course **all** users on the waitlist will receive an email notifying them of the opening. That seat is then given on a first come first serve basis.

In order to register for the open seat, a user must:

1. Log into TRAIN.
2. Go to their **My Learning.**

3. Click **M** to manage the course in question.
4. Click the **Register** button.

These directions are also provided to the user in the open-seat notification email.

Course Providers will also receive a notification email when a session has been filled. Course Providers are not able to directly move users from the Waitlist to the active Course Roster, unless the session allows for over-registration.

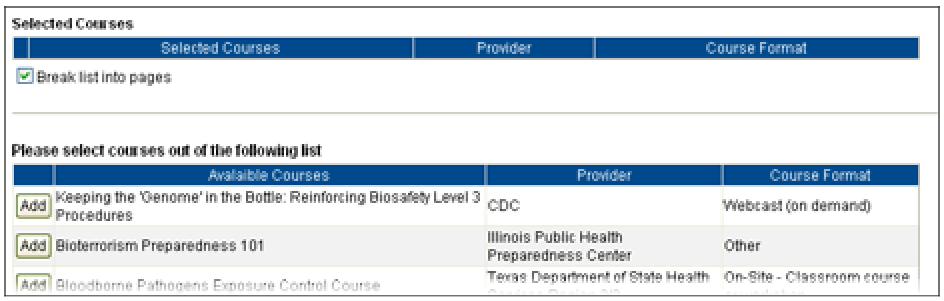
Course providers and appropriate administrators now also have the option to email users on the waitlist for any given class. To do so, simply access the course roster and select the **Waitlist** tab. Then, select from the wait list which users you would like to email and click the **Send Email to Selected Users** button

> **Note: If a registration deadline is entered, *and that date has passed*, learners that are on the Waitlist will not be added to the Course Roster automatically if a registered learner withdraws from the course. They will need to be manually added to the Course Roster.**

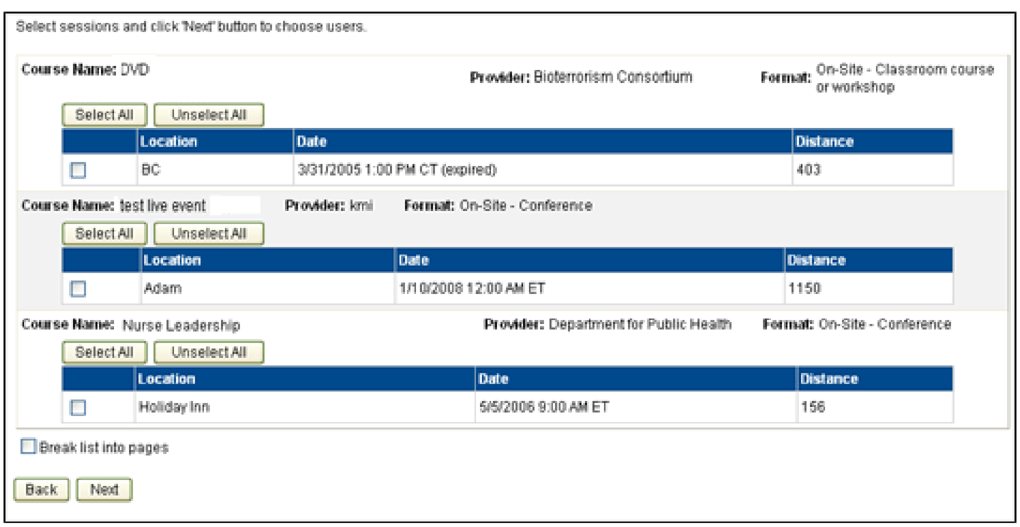
Email Course Registrants

This Utility module allows you to conveniently send an email to any number of TRAIN users who are registered for a particular course, or courses. To use the utility:

1. Click on the **Administration** tab.
2. Select **Utilities** from the menu on the left side of the page.
3. Under **Utilities**, select **Email Course Registrants**.
4. You will be presented with a list of available courses, broken down into pages. To view all courses on one page in one list, un-check the **Break into Pages** checkbox.



5. To add a course to your Selected Courses list, click the **Add** button to the left of the course name. The **Selected Courses** list represents the pool of courses from which you may select users to receive your email. When you have completed your list, click **Next**.
6. If any of your selected courses are **Live Even**t courses (meaning they contain sessions), you will then be asked to select the sessions from which you to pull registered users.
   Each Live Event Course selected will be displayed with all of the courses sessions listed underneath the Course Name (see image below). To add all of a courses sessions, click the **Select All** button under the Course Name. To select an individual session or sessions of a particular course, place click the checkbox in the **Select All** column.



When you have a check next to all sessions you wish to include in your search, click **Next**.

7. Next, TRAIN will put together a list of users who have registered for the courses (and sessions where applicable) you have selected.
8. The list of users will be presented in alphabetical order along with information about their registration, including: Course Name, date Registered, Course Provider, Course Format, Course Status (in-progress, withdrawn, etc), and Location and Session Date (where applicable).
9. You may either click the **Select All** button at the top of the page to include all the available users in your email, or you may select users individually by clicking the checkbox next to the user's name. By default the user list is broken into pages (10 users per page). To flip from page to page, click a numeral link at the bottom of the page. To view all users on one page, un-check the **Break Into Pages** checkbox.
10. Once you have selected all users to receive your email, click **Next**.
11. For verification purposes, all selected users will be displayed in a list. If you need to make any changes to this recipient list click **Back** and modify the pages of selected users.
12. To send your email, fill out the Subject and Body forms, add any necessary attachments and click **Send Mail**.
    a. To add an attachment, first click the **Browse…** button.
    b. Find the file you wish to upload in the **Choose File** window, and click **Open**.
    c. Click **Upload**, next to the browse button.
    d. Your attachment will upload into TRAIN and be listed under the **Attachments** text.
    e. You may continue to add attachments through the same process. To delete an attachment from the list, click the blue X next to the attachment name.
13. A verification message will be displayed indicating that your email has been sent successfully.

Email tool reminder --The email tool is only as effective as the email addresses for the user accounts are current. Course providers should remind learners to keep their TRAIN account updated. Learners who don't have their current email address listed in TRAIN will miss important messages.

Verifying Attendance and Withdrawing Learners

Verifying learner attendance to many types of courses will be automated by the TRAIN system. SCORM compliant courses will, by their nature, be tracked if the course provider has set up the appropriate connections with TRAIN. Course providers will also have the ability to enable learner self-verification for live events through the inclusion of secret words or phrases at or near the end of the events. Learners may be asked to enter the secret word or phrase as they mark completion of a course in their **My Learning** area. Some manual verification will, in certain circumstances, be required. There are two methods for manual verification of attendance, one from the learner perspective and one from the session perspective.

Verifications and Withdrawals from the Learner Perspectives

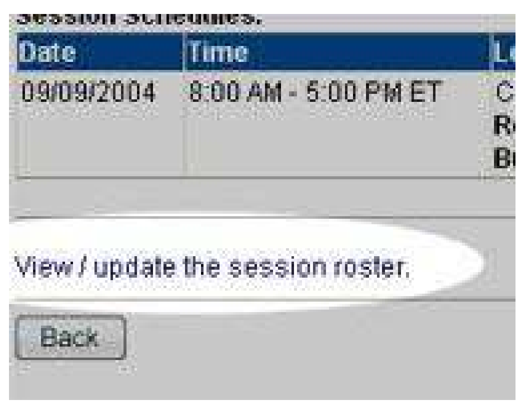
There are instances where the Course Attendance Manager will be asked to verify an individual's completion of a course. Videos, books or CD-ROMs may also require this type of verification. Verifying a user's completion will automatically mark the course as **Complete** in the user's Training Record. To verify a user, follow these steps:

1. Log on to your TRAIN site.
2. Click on **Administration**.
3. Click on **Users** and then **Verifications** from the left-side list menu.
4. Select the groups or subgroups you wish to search for a user, enter the user's last name in the appropriate field and click **Show Users**.
5. On the user's page, click **Show Courses**.
6. You may now verify learner attendance or withdrawal by clicking the appropriate check box.

Verifications and Withdrawals from the Session Perspective

Course Session Managers and Course Providers have the ability to verify attendance or note withdrawals (including "no shows") for a given session.

1. Log on to your TRAIN site.
2. Click on **Administration**.
3. Click on **Courses** and then **Course List** on the left-side list menu.
4. Click on the session icon (Clock).
5. Locate the session location and click on its title.
6. Click **View/Update the session roster**.
7. Select **Verified** or **Withdrawn** as appropriate for each learner. You may also change/update the Credit Type assigned to each enrolled user.

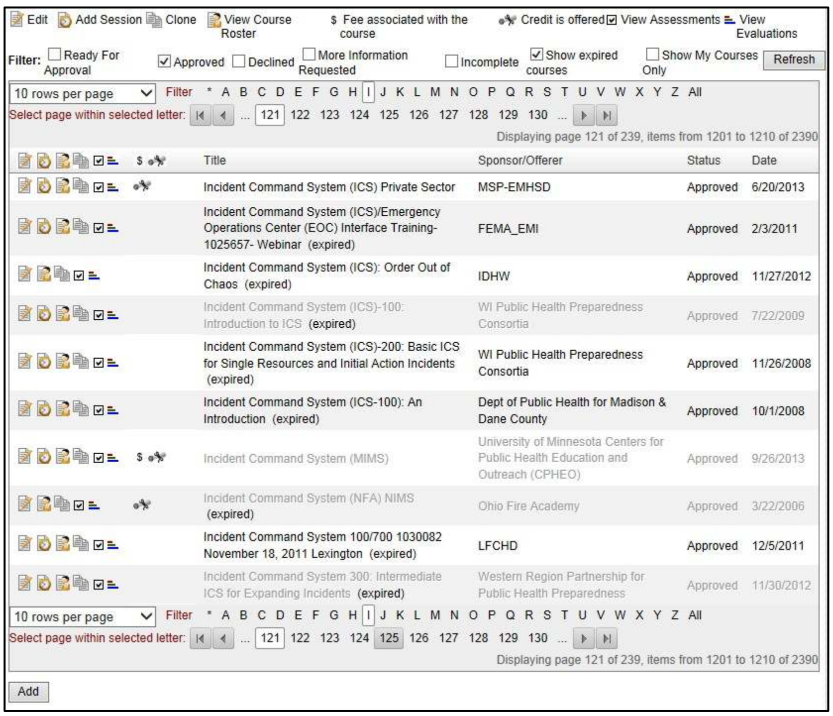


Batch Registration

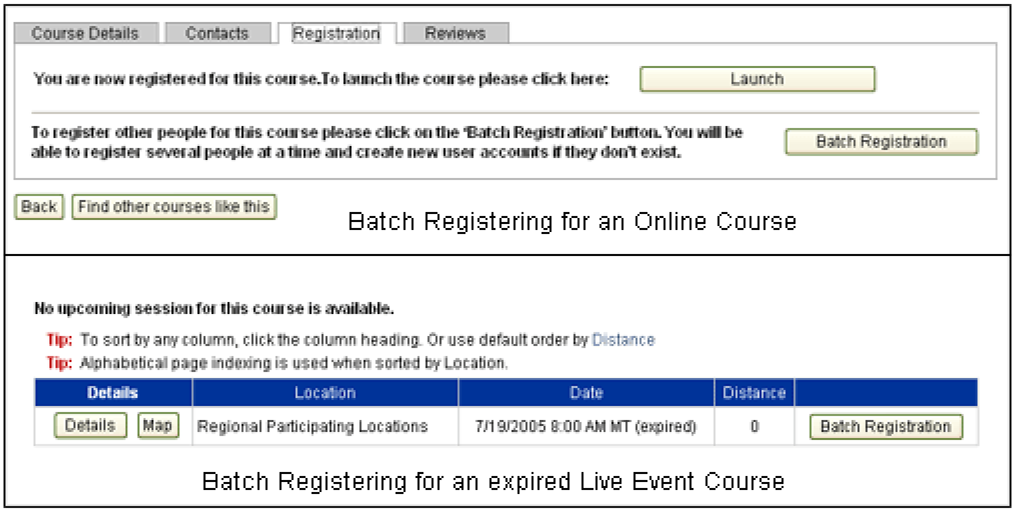
The process of Batch Registration allows a Batch Registration Administrator or Course Provider to register users into a course manually, regardless of the course format or the “expired” status of the course (an expired course is one that has taken place in the past). This is very helpful for state administrators when it comes to reporting and tracking, as past courses can be entered into TRAIN and then have users Batch Registered into the course, so that the training information is captured as part of all the TRAIN data.

In order to Batch Register users into a course or session:

1. Go to the Course List – through the **Course Search** tab, or the **Administration** tab.



2. Click on the course name you wish to batch register users into, and click the **Registration** tab.
3. If you have the appropriate administrative rights for the course in question, you will not only see the registration button, but you will now see the **Batch Register** button. For Online courses, there will be just one Batch Registration button. For Live Event courses with sessions, there will be a Batch Registration button for each session.



Batch Registering for an Online Course

Batch Registering for an expired Live Event Course

4. Click the **Batch Registration** button for the session into which you wish to register users to proceed to the Batch Registration screen.

Adding Users

1. The first step in batch registering users is to create a list of users to register. There are three ways of adding users to the Batch Registration list, of which you may use a combination. To continue, select one of the following:
    a. **Add Existing User** – This allows you to search for users who are eligible to register for the course and add them to the list of users to Batch Register. There are two search options available to you: **Simple** and **Advanced**.

       Simple search mode allows you to find users based solely on their last name and/or their grouping assignment. Enter the last name of the user you are looking for, check the **Search users in sub-groups**, and click **Search**. Or you may highlight a particular group and click **Search**. This will display a list of all users in the group, and if the **Search users un sub-groups** box is checked, the list will include all users in sub-groups of the selected group.

       Advanced search mode allows you to search for users not only by last name and group assignment, but also by first name, login name, email, organization, city, country, and zip code. You may also search for users based on their Professional Role, their Work Settings, or by Demographic information.

Select the tab you wish to work from, and enter your search criteria. For example, if you would like to register any user who has a Work Setting of "Official Public Health Agencies", click the **Work Settings** tab and place a check in the "Public Health Agencies" checkbox, and click **Search**.

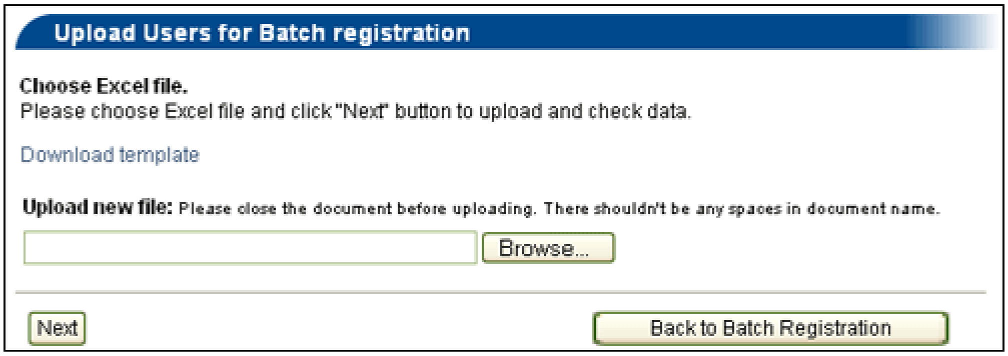
Once you click **Search** you will be presented with a list of all users matching your search criteria. To add a user or users to your Batch Registration list, add a check to the checkbox to the left of their Login Name (or click the checkbox at the top of the checkbox column to select all) and click **Add Selected Users**. You will be redirected back to the Batch Registration page with all selected users added to your Batch Registration List

b. **Add New User** – The **Add New User** feature allows you to enter new user accounts individually, as well as assign them to a Group. The groups available to you for assignment are determined by your administrative status, as well as the Visibility of the Course/Session in question.

   To add a new user you only have to enter the user's Login Name, First Name, Last Name, Email, and Group Assignment. All other required information will be collected upon the user's first login attempt.

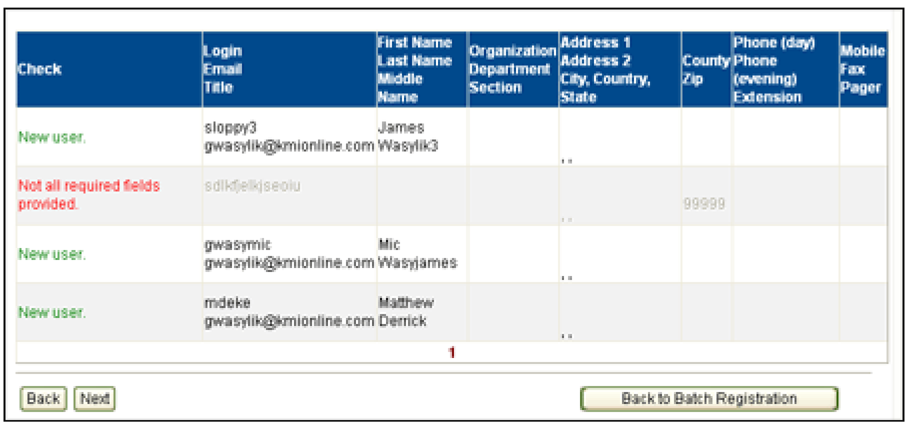
   Once you have entered all information for the new user, click "Save" and the user account will be created and added to the list of users to Batch Register. If you choose, the user will also receive a notification email informing them that an account has been created for them on TRAIN along with additional login information.

2. **Upload Users** – This option allows you to upload a large number of users through an excel spreadsheet. You will first need to download the "Upload Template" excel sheet, which is provided to you by the **Download Template** link.



The template provides you with the fields that you are able to fill out for each new user. All fields highlighted in **red** are required, and the user upload will fail without them.

Once you have completed filling out the excel sheet, click the **Browse** button to locate the file on your computer, and click **Open** once you have found the file and have it highlighted. Then click **Next**. TRAIN will upload the users into a temporary table, where it will check the validity of the data provided and display a report of users in the upload.

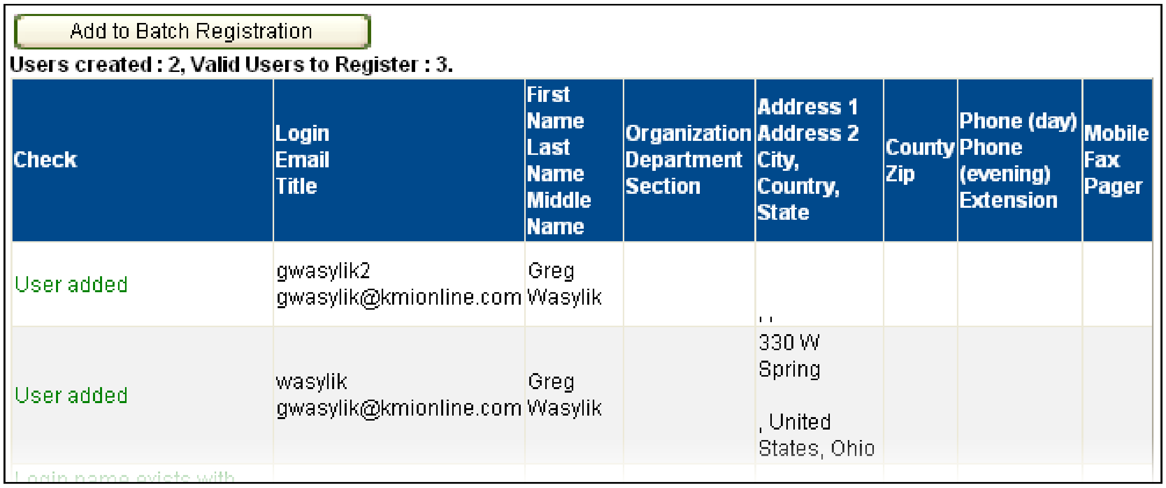


Check	Login Email Title	First Name Last Name Middle Name	Organization Department Section	Address 1 Address 2 City, Country, State	County Zip	Phone (day) Phone (evening) Extension	Mobile Fax Pager
New user.	sloppy3 gwasylik@kmionline.com	James Wasylik3		, ,			
Not all required fields provided.	sdlkfjelkjseoiu			, ,	99999		
New user.	gwasymic gwasylik@kmionline.com	Mic Wasyjames		, ,			
New user.	mdeke gwasylik@kmionline.com	Matthew Derrick		, ,			

All user accounts that check out will noted by the green **New User** text in the **Check** column. All user accounts that fail will be noted by red text in the **Check** column which will describe the reason(s) for the account failing. User accounts that already exist will noted by the green **User already exists** text – these users will not have duplicate accounts created for them, but will have their accounts added to the Batch Registration list of users to register into the course.

At this point you may either click **Next**, which will continue on to creating the user accounts that passed the check, or click **Back** to cancel the new accounts and to try your upload again once you have corrected any problems with failed user accounts. After clicking **Next** you will then be directed to assign all of the new user accounts to a Group. The groups available to you for assignment are determined by your administrative status as well as the Visibility of the Course/Session in question.

Once you have selected a Group for the new user accounts, click **Next**. You will be asked to verify that you wish to create the new accounts. Simply click the **Create New User Accounts** button to create the new accounts. The screen will then refresh with confirmation of the number of new accounts created, as well as the total number of users available to add to the Batch Registration list.

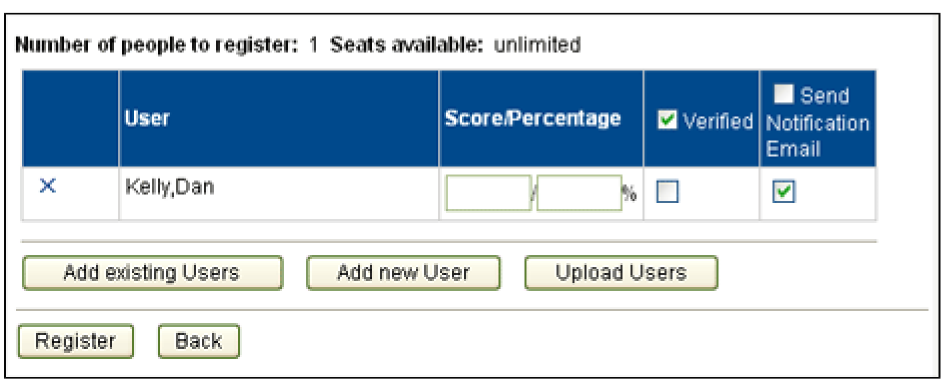

Add to Batch Registration

Users created : 2, Valid Users to Register : 3.

Check	Login Email Title	First Name Last Name Middle Name	Organization Department Section	Address 1 Address 2 City, Country, State	County Zip	Phone (day) Phone (evening) Extension	Mobile Fax Pager
User added	gwasylik2 gwasylik@kmionline.com	Greg Wasylik		, ,			
User added	wasylik gwasylik@kmionline.com	Greg Wasylik		330 W Spring , United States, Ohio			

Click **Add to Batch Registration** to return to the list of users to Batch Register. If you choose, new users will also receive a notification email informing them that an account has been created for them on TRAIN along with additional login information.

3. Once you have filled out your Batch Registration list of users, you are ready to complete the final steps of Batch Registration. To complete the process you must:
   a. Select **Credit Type** (where applicable) to apply to users during registration.
   b. Add a score/percent (where applicable) to save on the user's transcript
   c. The status column allows you to select from three statuses. These statuses will be applied to the registration. If the user will still need to take the course after you have batch registered them, use the 'In Progress' status. If the user is completed or completed and verified, and will not need to take the actual course content *after* being batch registered, use either the 'Completed' or 'Verified' statuses.


Number of people to register: 1 Seats available: unlimited

	User	Score/Percentage	Verified	Send Notification Email
×	Kelly,Dan	/ %	☐	☑

Add existing Users | Add new User | Upload Users

Register | Back

d. Choose whether or not the users will receive a notification email containing information regarding the registration. To select all users, click the **Send Notification Email** at the top of the Notification Email column. You may also select individual users to receive the email.
e. Once the settings for each user in the Batch Registration is complete, click the **Register** button to finalize the transaction. The screen will refresh with a message confirming all registrations.
f. If you are done with your Batch Registration, click **Back** to return to the Course Details page. Or click **Register More People** to continue Batch Registering users.

Evaluations and Assessments

State Administrators, Course Providers and users with the Evaluation or Assessment Manager role are able to create Assessments and Evaluations for courses on TRAIN, regardless of the Course Format. Pre-Assessments are given to users as the first step in registration and must be completed before the user's registration moves to **In Progress**. Post-Assessments are given to users after they have completed a course and must be completed before the course will be marked as **Completed** and moved into their transcript. Evaluations are given after any post-assessment has been completed, and can be set as either mandatory or not-mandatory. Assessments have quantifiable questions that are graded for a pass/fail result, while Evaluations are completely subjective and are not graded in any way.

Creating, Editing, and Assigning Assessments

Many admins will wish to add graded Assessments to their courses, to test user comprehension of the course material. To create a new Assessment, or to edit an existing Assessment, admins should follow these steps:

1. Using the course search interface, find the course which will be receiving the Assessment.
2. Click on the Edit icon to the left of the course name to enter the Course Edit interface, then click Assessments in the left hand menu. Alternatively, click the Assessment icon in the course search interface to jump directly to the Assessments page.
3. Click the "Assign Assessment" button to bring up the Assessment interface, or click the Delete icon to remove its corresponding entry from the Course.

From there, admins can delete Assessments, assign an existing Assessment to the course, or create a new Assessment. To create a new Assessment, click on the "Add New Assessment" button. To edit an existing Assessment, locate the desired Assessment in the list, then click the Edit icon. Either of these actions will bring up the Edit Assessment interface. From there:

1. The *Attributes* tab allows the admin to specify starting information for the Assessment. Note that only the Assessment name, Min passing score, and Attempts Allowed fields are required, although admins may wish to specify additional information here.
    a. The attempts allowed field now defines how many times the user may complete and *fail* the assessment before they need to re-register for the entire course. Once the user has reached the attempts limit (and has failed all attempts), the only way the user can retake the assessment is to reregister for the course.
2. Admins can change the text which will be displayed at the start and end of the Assessment via the *Introductory text* and *Final page text* tabs. Changing this text is purely optional.

3. The *Assigned* tab shows all courses and conferences which currently share the Assessment. When creating a new Assessment, no courses or conferences will be listed. Assessments can be assigned to multiple Courses and conferences without conflict.
4. The *Visibility* tab allows admins to specify which groups should have access to the Assessment for their own courses. Note that this does not force the group to use the Assessment. However, this allows the Assessment to be accessed, edited, and assigned by other Admins to other courses.
5. Lastly, in the *Questions* tab, admins can create questions to be associated with the Assessment.
6. Once all the necessary and desired information has been entered, click the Save button to save the Assessment. If the Assessment is not yet active, the admin will be prompted to activate it. Inactive assessments will never be seen by users, but can still be edited by the admin.
7. Locate the desired Assessment in the list, and click the Assign button to assign it to the current course.
8. Select which groups should see this Assessment for the current course. This controls which users will encounter the Assessment as part of the course.
9. Select the Credit Types which should see this Assessment. Many courses will only have one credit type.
10. Select which type of Assessment is appropriate for the selected course.
    - **Pre-assessment** – The Assessment will be displayed before the course content.
    - **Post-assessment** – The Assessment will be displayed after the course content.
    - **Post-assessment practice** – The Assessment will be displayed after the course, and the score will not be recorded.
11. Select Auto Verify if completion of the Assessment indicates full completion of the course. If users should wait for an admin to manually verify completion of the course, uncheck this box.
12. Click Save. The Assessment is now assigned to the specified Course for the specified Group(s). Note that this change is saved as soon as the Course Edit Wizard reloads. Clicking the Cancel button in the Course Edit Wizard will not remove the Assessment.

Creating, Editing, Cloning, and Assigning Evaluations

Admins may wish to add feedback Evaluation questionnaires to their courses, to measure user opinion regarding the effectiveness of the course. To create a new Evaluation, or to edit an existing Evaluation, admins should follow these steps:

1. Using the course search interface, find the course which will be receiving the Evaluation.
2. Click on the Edit icon to the left of the course name to enter the Course Edit interface, then click Evaluations in the left hand menu. Alternatively, click the Evaluation icon in the course search interface to jump directly to the Evaluations page.

3. Click the "Assign Evaluation" button to bring up the Evaluation interface, or click the Delete icon to remove its corresponding entry from the Course.

From there, admins can delete Evaluations by clicking on the Delete icon, assign an existing Evaluation to the course, or create a new Evaluation. To create a new Evaluation, click on the "Add New Evaluation" button. To edit an existing Evaluation, locate the desired Evaluation in the list, then click the Edit icon. Either of these actions will bring up the Edit Evaluation interface. An icon that will allow for cloning the evaluation will also appear to the left of the evaluation name in the list. From the Edit evaluation screen:

1. The *Common* tab allows the admin to specify starting information for the Evaluation. Note that only the Evaluation name is required, although admins may wish to specify additional information here.
    a. Within the Assessments settings, is an option to **Allow User to Access Assessment Details After Assessment is Complete.**
    b. When this option is ON, users can access their submitted assessment answers and review the correct/incorrect status of these answers. When this option is OFF, users are now shown any link to review with assessment results; and cannot see which users were correct or incorrect.
2. Admins can change the text which will be displayed at the start and end of the Evaluation via the *Introductory text* and *Final page* tabs. Changing this text is purely optional.
3. The *Assigned* tab shows all courses and conferences which currently share the Evaluation. When creating a new Evaluation, no courses or conferences will be listed. Evaluations can be assigned to multiple Courses and conferences without conflict.
4. The *Visibility* tab allows admins to specify which groups should have access to the Evaluation for their own courses. Note that this does not force the group to use the Evaluation. However, this allows the Evaluation to be accessed, edited, and assigned by other Admins to other courses.
5. Lastly, in the *Questions* tab, admins can create questions to be associated with the Evaluation.
6. Once all the necessary and desired information has been entered, click the Save button to save the Evaluation. If the Evaluation is not yet active, the admin will be prompted to activate it. Inactive Evaluations will never be seen by users, but can still be edited by the admin.
7. Locate the desired Evaluation in the list, and click the Assign button to assign it to the current course.
8. Select which groups should see this Evaluation for the current course. This controls which users will encounter the Evaluation as part of the course.
9. Select the Credit Types which should see this Evaluation. Many courses will only have one credit type.
10. Click Save. The Evaluation is now assigned to the specified Course for the specified Group(s). Note that this change is saved as soon as the Course Edit Wizard reloads. Clicking the Cancel button in the Course Edit Wizard will not remove the Evaluation.

Follow Up Evaluations

In the process of assigning an evaluation to a course, you have the option of using an **Initial Evaluation** or a **Follow Up Evaluation**.

If you select the **Initial Evaluation** option, the evaluation is delivered to the user immediately after they complete course and/or any assigned assessments.

If you select the **Follow Up Evaluation** option, you will also need to provide a "days" value. TRAIN will then, after the defined number of days, present the evaluation to the user in their pending notifications on the TRAIN Home page.

Both evaluation types can be assigned to specific credit types.

Both Evaluation Types also include an availability "days" value. This value defines the number of days, after the user completes the course, that they will have to also complete the evaluation

Note: Evaluations that have a limited window of availability cannot be made mandatory.

Creating and Editing Questions for Evaluations and Assessments

Admins will frequently want to update existing Evaluations and Assessments, or add new questions to newly created Evaluations and Assessments. To create a new Question, or to edit an existing Question, admins should follow these steps:

1. Using the course search interface, find the course which will be receiving the Evaluation.
2. Click on the Edit icon to the left of the course name to enter the Course Edit interface, then click Evaluations or Assessments in the left hand menu. Alternatively, click the Evaluation icon, or the Assessment icon in the course search interface to jump directly to their respective page.
3. Click the "Assign Evaluation" or "Assign Assessment" button to bring up the appropriate interface.
4. Click the Edit icon next to the Evaluation or Assessment to be modified.
5. Click on the *Questions* tab. From there, existing questions can be modified using the Edit icon next to the appropriate question, or removed using the Delete icon. New questions can be added by clicking on the "Add Question" button. Editing or adding a Question will bring up the Question editing interface. Any changes done to an evaluation or assessment will reflect in any courses it may be associated with. An alternative is to clone the evaluation or assessment and then make modifications to the clone.

6. If this is a new question being created, the first step is to specify the Question Type. The selected type will determine what options are available in the editing interface.
7. The *Common* tab allows the admin to specify the basic information of the Question. The text of the question must always be specified, regardless of type. Assessment Questions must also have a specified point value, although this value can be zero (at the admin's discretion).
8. Some Question types will not have a second tab. In these Question types, the response options are specified on the *Common* tab. In Assessment Questions, this will include the option of setting a correct answer, if there is one.
9. Other Question types will have a second tab. The title of this tab will vary depending on the Question type, but the functionality is largely the same. The second tab is where the secondary information, such as Multiple Choice options, or captioning text for a rating scale, are defined.
10. Once all the required information is entered click "Save" to save the details of the Question. Note that all changes made here are saved at this point. Once the Question is saved, clicking "Cancel" in the Edit Assessment or Edit Evaluation interface will not remove the question or undo any changes saved to the question.

Making Sure Your Course Can Be Tracked

TRAIN can launch and track learner participation and course data for web-based courses that conform to the Sharable Content Object Reference Model (SCORM). For convenience, TRAIN will soon include a tool to help web-based course providers ensure their courses can be tracked in TRAIN. For information on integrating your SCORM compliant course into TRAIN, please contact our technology partner KMi Inc. at support@train.org.

SCORM Information

TRAIN conforms to the SCORM, Version 1.2. SCORM is an evolving collection of specifications adapted from multiple sources to enable interoperability, accessibility, and reusability of web-based learning content. The SCORM is important to the development, packaging, tracking, and delivery of e-learning. The model includes aspects that affect learning management systems like TRAIN, content authoring tools, content developers, and others. SCORM was developed by Advanced Distributed Learning (ADL), an initiative sponsored by the U.S. Department of Defense, in collaboration with government, academic, and industry partners. To learn more, refer to the following:

- Advanced Distributed Learning, www.adlnet.org
- *Making Sense of Learning Specifications & Standards: A Decision Maker's Guide to their Adoption,* a 2002 report from the MASIE Center's e-Learning Consortium

SCORM and TRAIN

In order to take advantage of SCORM compliancy, your course must have been developed to be SCORM compliant to begin with. You must also obtain the TRAIN-SCORM Course Player and install the player on the server where your SCORM course resides. To obtain the Course Player, contact TRAIN Technical Support at support@train.org.

The TRAIN course player is designed to work with SCORM Version 1.2 conformant content that meets the minimal requirement as defined in the SCORM specification.

The following data elements are supported within TRAIN:

```
cmi.core._children
cmi.core.student_id
cmi.core.student_name
cmi.core.lesson_location
cmi.core.credit
cmi.core.lesson_status
cmi.core.entry
cmi.core.score_children
cmi.core.score.raw
```

```
cmi.core.score.max
cmi.core.score.min
cmi.core.total_time
cmi.core.exit
cmi.core.session_time
cmi.suspend_data
cmi.launch_data
cmi.student_data._children
cmi.student_data.mastery_score
```

For best results, your course should not use any data element not listed above. If your course does use non-supported data elements, you must ensure your course can properly deal with the error codes that will be returned when calling any non-implemented data elements.

The server hosting the player must meet one of the following specifications:

1. Windows server capable of running ASP pages. Additionally the server must have the MS SOAP Toolkit version 3.0 installed.
2. UNIX like server capable of running PHP pages.
3. ASP.NET is supported on servers with the .NET Framework version 2.0 and higher

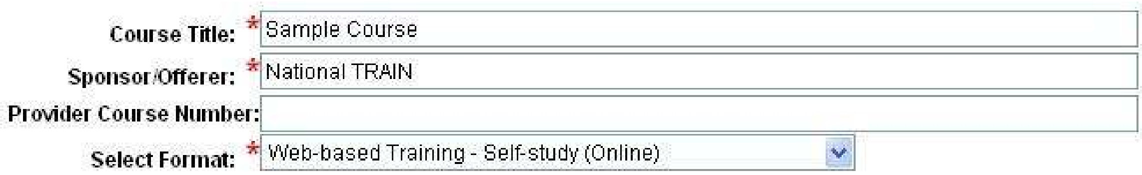
Installing the JavaScript SCORM Player on your server

The SCORM player consists of a set of files which you receive from KMi. These files are placed on your server according to the instructions provided. Before sending you these files, we must receive from you a signed copy of a non-disclosure agreement (NDA) concerning the player technology. The NDA may be obtained by contacting either your TRAIN affiliate administrator or PHF. Please let us know the official name of the organization you represent which will be receiving the SCORM player so we may complete the appropriate fields of the NDA before faxing it to you. After signing it, you may fax it back to KMi at (614) 224-0665.

Entering your SCORM Course on TRAIN

You can also find this information in the section **Entering or Modifying a Course**.

1. Your course **must** be of type **online** in order to see the SCORM options.

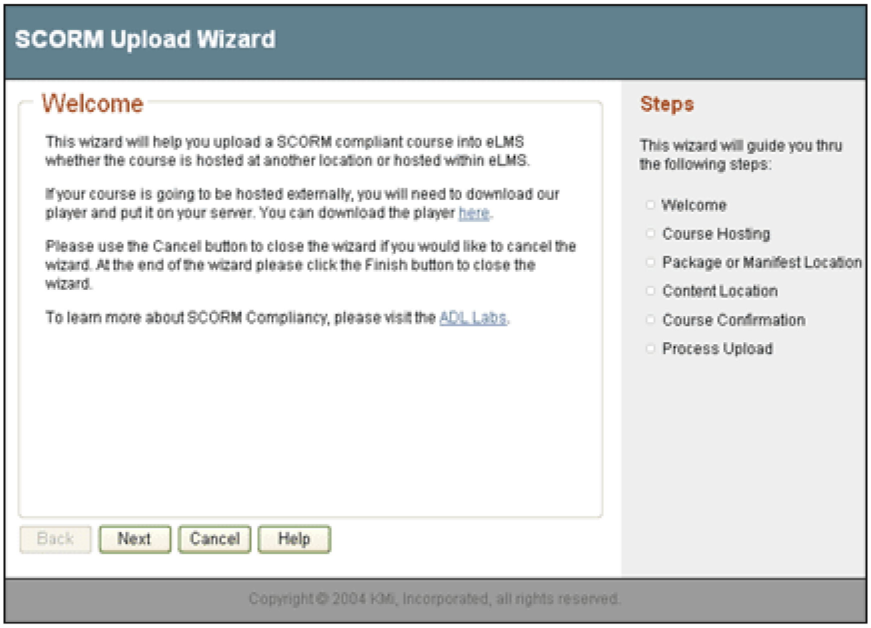


2. Check the box next to the text **Please select if this course is SCORM compliant**.
3. By selecting **External LMS Integration,** you will prevent users from modifying their own registration status (only use the **External LMS Integration** option if you are an advanced course provider and have first spoken with KMi about using the feature).
    a. When a course is marked for external integration, the user is prevented from withdrawing from the course unless specifically set otherwise. This is for the sake of consistency between TRAIN and the external LMS.
4. Enter the URL to your course Manifest by using the **SCORM Upload Wizard.**

5. If there are users registered for your course, you should **not** change the course content. Doing so may break the course for users who have not yet completed it.
6. TRAIN prevents you from importing a new manifest if there are users still taking the course. If TRAIN allows you import a new manifest, then it is safe to replace your content.

The SCORM Wizard

Once you click the SCORM Upload Wizard link, TRAIN will pop-open a new window where the Wizard will be displayed.



1. There are several steps in uploading a SCORM course through the wizard.
2. The first page will Welcome you to the SCORM wizard, and give you a brief overview of the SCORM process. You will also find a link to a SCORM player which you may download and place on your server.
3. To begin the upload process, click **Next** in the SCORM Wizard. To leave the SCORM Wizard at any time, simply click **Cancel**.
4. The following screen will indicate if there are any existing registrations for the course; if there are registrations, you can choose to keep or override those registrations. You should only keep your registrations if the new SCORM upload is very similar to the previously uploaded courses.

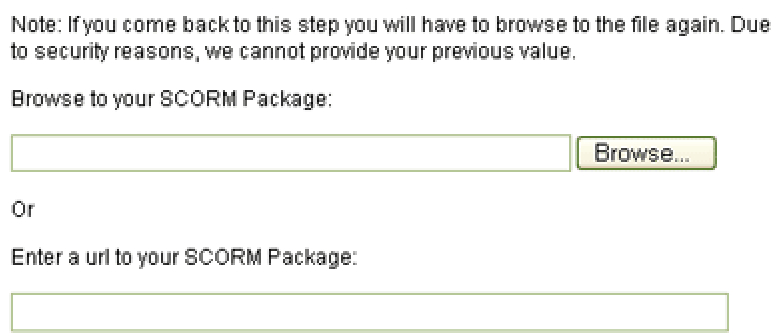
5. The next screen will be the Course Hosting screen.
6. The course hosting screen has just one option at this time: **External**. Courses may only be hosted outside of TRAIN. By selecting **External** and clicking **Next**, you are preparing TRAIN to accept your course's SCORM Manifest which will establish the SCORM link between the server hosting the course content and the TRAIN server.
7. You can also upload multiple SCORM files into a BLS course. To do so, select **Yes** for multiple manifest files and click **Next**.
8. Part of the multi-SCORM upload, is the option to list all the courses uploaded as a BLS courses.

a. This means, if you upload multiple SCORM packages, each package will be given its own courses.

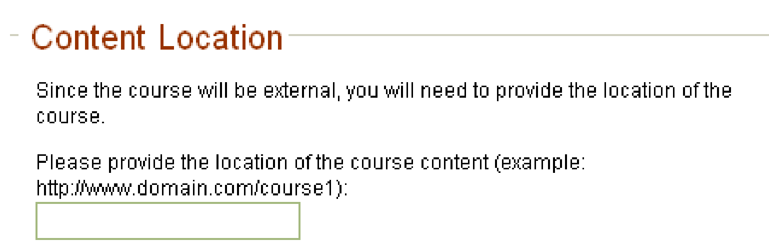
b. However, an overall BLS course will also be created. This BLS courses will be the access point for the other courses. The courses which compose the BLS will not be available outside of the BLS.

c. If you choose to upload multiple SCORM packages, but choose not to create a BLS, then each SCORM package will still be given its own distinct course (and courseID), but these courses will be available individually outside of any BLS. More so, the course information that is entered so far for the current course, through which the current upload is taking place, will be cloned (plus a small addition to the name to indicate the order in which the packages were uploaded and assigned to the courses – for example, “Blood Transfers – Index 1” – “index 1” is automatically added).

9. Once you have made your selection, click **Next** and proceed to the **Location** screen.
10. Depending on whether you have selected Internal or External, you will either see instructions to locate your SCORM Package, or SCORM Manifest. The procedure for locating either is identical.
11. If you are on the machine that contains your SCORM upload, simply click **Browse** to find and open your package/manifest. If your package/manifest is located on a server, enter the full URL (including http://) for your upload.

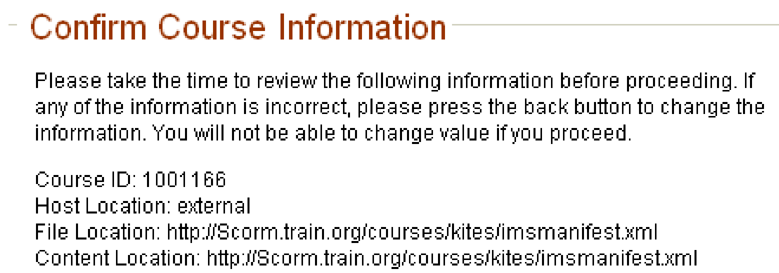


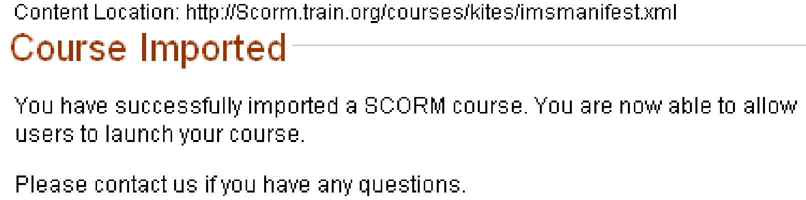
12. To add more than one SCORM package, click the add button – notice that a new Browse/URL field is available. You can also use the **Remove** button to the right of each file path/URL to remove that specific SCORM package from the upload
13. Once you have entered a path for the location of your SCORM upload, click **Next** to proceed. The contents of the next screen will depend on if you are uploading a package or a manifest. If you are uploading a packaged SCORM course, you will be given the URL of your course that TRAIN system has generated for you. If you are uploading a manifest that is pointing to your course, you will need to enter the course’s content location.
14. For an external SCORM course, the Content Location screen



requires you to enter the exact URL that will point to the content of your SCORM course. This will generally be the default directory of your SCORM course.

15. Once you have entered the Content Location URL, click **Next** to proceed to the confirmation page.
16. The Confirmation Page will review all of the relevant course information. You should take a moment to verify all of the information to ensure it is correct. If you notice any problems, simply click the **Back** button to update any of the previous screens.
17. Once you have verified all of the course information, click **Next** to begin processing your SCORM upload.





18. Once your course has been successful uploaded and processed (which, with a package upload, could take a few minutes), you will be given a confirmation message that the upload was successful. Be sure to click the **Finish** button to complete the Wizard and return to the course edit page.
19. If you have uploaded multiple SCORM packages and have created a BLS course for those packages, you will next see the 'BLS Redirect' screen. If you would like to open the BLS that was just created, click **Finish**; otherwise, uncheck the box on the page and then click **Finish**.
    a. This will move you back to the original course – if you selected to see the BLS, the page will quickly reload to the new BLS course (notice that all details are already provided)
    b. You can now move to the **Format Details → BLS components** portion of the wizard to see the packages that have been uploaded – the status of each course will also be listed there as 'Incomplete'. If you submit the entire BLS for approval, each part will also be submitted.
    c. If you have not created a BLS course for your multi-SCORM upload, you will need to submit each course individually for approval.
    d. In terms of the naming scheme for multi-SCORM uploads, if you use a BLS, the BLS will have the name of the course you entered, plus "- 0" after the end. Each course is succession will have "- 1", "- 2" and so forth, added to the end of the course name.
    e. If you have not used a BLS, the first package uploaded will be attached to the "- 0" course. This is the "original" course that you are working on and will be taken back into when the SCORM upload wizard closes.

Course Entry References

This section lists response choices for major course entry fields. You may find it helpful to keep these pages handy as a reference when entering courses on TRAIN.

Subject Areas

- Access to Care (includes health insurance)
- Agriculture
- Animal Health
- Assessment/Analysis
- Chronic Diseases
- Computer Skills/Training
- Cultural Competence
- Disability
- Education/Training/Exercises/Drills
- Emergency Management
- Emergency Medical Services
- Environmental / Industrial Health
- Epidemiology / Biostatistics
- Evaluation
- Family Planning / Reproductive Health
- Finance / Grants
- Fire
- General Public Health
- Genetics
- Hazmat
- Health / Risk Communications
- Health Care
- HIV/AIDS
- Home Care
- Infectious Diseases / Immunizations
- Informatics / Technology
- Injury / Violence / Trauma
- International Health
- Investigations / Inspections / Enforcement
- Laboratory
- Law Enforcement
- Legal / Ethical
- Management / Leadership
- Marketing
- Mass Prophylaxis
- Maternal / Child Health
- Mental Health
- Minority Health / Health Disparities
- Nutrition
- Occupational Health and Safety
- Oral Health
- Other
- Partnerships
- Performance / Quality Improvement
- Personal Communications
- Pest / Vector Control
- Physical Activity / Obesity
- Policy / Planning
- Prevention / Promotion
- Procurement
- Program Development
- Public Safety
- Public Works
- Research Methods
- Sexually Transmitted Diseases
- Substance Abuse (Alcohol Tobacco and Other Drugs)
- Surveillance
- Terrorism / Emergency Readiness
- Volunteering
- Workforce Development

Available Definitions of Subject Areas

1) **Access to Care –** Related to an individual's or group's ability/inability to receive needed health care such as preventive services, medical care, insurance, and other services. Other examples of access issues include managed care, ambulatory sensitive illnesses, rural health, Medicaid / Medicare, referral patterns, case management, and reducing barriers to care.

2) **Animal Health –** Veterinary public health courses related to the surveillance, prevention, and control of zoonoses important to public health. Courses may address the role of animal health in preventing foodborne diseases, the safety of food for human consumption, and environmental protection to prevent risks associated with livestock production and pet ownership.

3) **Chronic Diseases –** Diseases that are prolonged, do not resolve spontaneously, and are rarely cured completely. Examples include asthma, cancer, diabetes, kidney and heart disease. Some diseases such as HIV can be grouped in a variety of subject areas (chronic disease, infectious disease, and sexually transmitted disease).

4) **Cultural Competence –** Issues related to increasing an organization's or individual's ability to effectively serve and learn from various cultures. This includes knowledge building, management practices, communication skills, and other areas. Courses may focus on topics such as multiculturalism, population-specific cultural issues, culturally competent counseling, services assessments, and policies.

5) **Disability –** Courses may include information about mental and / or physical disabilities, providing services for people with disabilities, detection of disabilities, and improving access and fulfillment of ADA requirements.

6) **Environmental / Industrial Health –** Issues related to minimizing public exposure to environmental health hazards and prioritizing / addressing health issues in the environment or related to industry. Environmental health practices, air quality regulation, environmental emergencies, asbestos eradication, environmental pathogens, and food safety issues are examples of courses that may be found in this subject area.

7) **Epidemiology / Biostatistics – Epidemiology courses** help practitioners monitor and investigate disease trends in a population, identify underlying causes of disease or determine the extent of the problem. Courses may address general epidemiological principles or epidemiology related to specific diseases (e.g., cancer), so long as a significant part of a course covers the epidemiology of a disease and illustrates epidemiological principles.

Biostatistics courses help learners determine the validity and reliability of data and information gathered in the field. Course topic areas may include statistical methods and research design, linear regression, statistical software packages, and other areas pertaining to numerical relationships in biological and medical data.

8) **Evaluation –** Covers qualitative or quantitative methods to measure public health programs or systems. Topic covered may include the design and implementation of outcome evaluation (effectiveness), process evaluation (accountability, documentation), and formative evaluation (focus groups, surveys, and other audience research). Courses may be specific to a program area (e.g., evaluation of STD prevention programs). See also, "Performance / Quality Improvement."

9) **Family Planning / Reproductive Health –** Related to contraception, fertility, and other sexual health issues and services for females and males of reproductive age and throughout the life span. See also, "Maternal / Child Health," "Genetics," and "Sexually Transmitted Diseases and HIV/AIDS."

10) **Finance / Grants –** Issues surrounding program funding, fiscal management, budgeting, grant development, and other monetary concerns related to public health are examples of course topics that should be listed in this subject area.

11) **Genetics –** Course topics may include information about gene therapy, stem cell research, molecular concepts and applications, genetic counseling, and public health applications. When applicable, ethical implications of genetic research can be cross-listed in the "Legal / Ethical" subject area.

12) **General Public Health –** This is not a "catch all" category. Only courses about the field of public health, such as an introduction to the Essential Public Health Services, history of public health, organization of public health services in the United States, or broad courses in the practice of public 89 health, trends, and emerging issues should be listed in this subject area.

13) **Health / Risk Communications –** Communications that increase awareness and favorably influence attitudes and health behaviors on a personal or community basis. Courses in this area are generally population-based and may include topics such as risk perception, media advocacy, materials development, health literacy, communications technologies, and the selection of audience specific communication methods. See also, "Personal Communications" and "Marketing."

14) **Infectious Diseases / Immunizations –** Infectious diseases including vaccine preventable illnesses that can pass from one organism to another through various modes of transmission. Courses in this subject may include general infectious disease information or may include specific information about the diagnosis and treatment of a disease. Other topics may include

vaccine efficacy, modes of transmission, population-based immunization programs, policy, and infection control techniques. See also, “Sexually Transmitted Disease and HIV/AIDS,” “Investigation/Inspection Skills” and “Maternal / Child Health.”

15) **Informatics –** Utilizing information technology and computer applications in public health. Examples include geographic information systems (GIS) systems, web based data systems, internet search skills, database management, knowledge management, and using statistical packages.

16) **Injury / Violence –** Issues surrounding awareness and prevention of intentional or unintentional injury, in home, school, or community settings (See “Occupational Health and Safety” for injuries in the work place). Includes courses on topics such as motor vehicle crashes, pedestrian safety, recognition and intervention in domestic or child abuse, conflict resolution programs, social work counseling, and other injury and violence prevention programs.

17) **International Health –** Focuses on global perspectives of health care delivery and public health in developing countries including health concerns such as waste water treatment, infectious diseases, nutrition, shelter, and other issues. In addition, courses may include global impact studies (e.g., burden of disease), methodology, and delivery systems.

18) **Investigations / Inspections –** The skills and knowledge necessary to carry out effective and efficient inspections / investigations of health related events. Topics in this area may include contact tracing, environmental health inspections, restaurant inspections, interview techniques, code inspections, and other skills.

19) **Legal / Ethical –** Local, state, and federal laws and/or policies that affect public health and health care in general. Examples of course topics in this area may include legal/ethical implications of service delivery, treatment of study populations including institutional review board (IRB) issues, patient confidentiality, mandated testing / treatment, uses of civil and criminal law to address public health threats, and the legal basis of public health.

20) **Management / Leadership –** Courses in this subject area should address specific skills in management of non-for-profit, private, and public organizations, leadership techniques, strategic planning, health care administration, staffing, and other management principles related to public health professionals.

21) **Maternal / Child Health –** Issues related to the general reproductive health of women, prenatal/postnatal care, genetic counseling (see also, “Genetics”), child development, childhood immunizations, and other areas that directly influence the health and wellbeing of mothers and their children. See also, “Family Planning / Reproductive Health” and “Infectious Diseases / Immunizations.”

22) **Marketing –** Courses that address specific strategies to use the media, communications, or other means to promote behaviors, beliefs, products, policies, or services in the interest of public health. This subject area includes research-based social marketing methods such as focus groups, surveys, and other data collection. See also, “Health / Risk Communications.”

23) **Mental Health –** This subject area should provide information about mental illness, population-based interventions, public health delivery or contractual agreement for mental health services, and a basic introduction to mental diseases such as depression, bipolar disorder, and anxiety disorders as they relate to public health.

24) **Minority Health / Health Disparities –**Relevant course topics may include health issues and effective interventions for racial and ethnic minority populations, age-defined populations, gay, lesbian, and transgender populations, socioeconomic groups, or other populations that experience health disparities; strategies to eliminate disparities; and methods to track and report disparities on specific conditions that disproportionately affect minority groups, such as diabetes, sickle cell anemia, and infant mortality also may be listed.

25) **Nutrition –** Health related food and nourishment issues for infants, children, and adults. Course topics may include nutritional counseling, population-based nutrition programs, WIC programs, supplements, and others. See also, “Physical Activity / Obesity.”

26) **Occupational Health and Safety–** Health issues that affect populations at the workplace. Examples of course topics include job-related injuries, functional capacity evaluations, repetitive stress disorders such as carpal tunnel syndrome (CTS), workplace health promotion programs, and ergonomics. Courses also may be cross-listed in the subject area(s) “Injury / Violence” or “Environmental / Industrial Health” when applicable.

27) **Oral Health –** Courses dealing with access to dental care, dental insurance, dental caries, sealant programs, dental varnish, and fluoridation of water may be found in this subject area.

28) **Partnerships –** Courses may cover strategies to establish and maintain working arrangements with various parties involved in public health, partnership evaluation methods, partner accountability, roles of partners in specific public health functions, and related issues.

29) **Performance / Quality Improvement –** This topic covers the practice of using performance data (measures and standards) to establish goals, prioritize resources, align or change policies, report progress, and improve the quality of public health practice. Courses may address performance related to specific areas, such as human resources, health status, customer satisfaction, and business results. See also, “Evaluation.”

30) **Personal Communications –** This category differs from “Health Communication” in that it is specifically targeted at the individual’s own communication ability. Course listings may include topics such as personal writing, listening, public speaking, counseling, and interpersonal skills.

31) **Pest / Vector Control –** A vector, often referred to as a pest, is a specific organism such as a mosquito, fly, or mite that can act as a carrier of disease. Courses in this subject area may address rodent control, mosquito control, modes of transmission, and other strategies to reduce vector borne diseases. Many topics in this subject area, such as the immunization and treatment of specific diseases (e.g., West Nile Virus, Malaria), can be cross-listed in the "Infectious Disease / Immunizations" subject area when applicable. See also, "Animal Health."
32) **Physical Activity / Obesity –** Course topics in this subject area may include population-based strategies to promote physical activity or other behaviors to reduce obesity, community design and policy strategies, services geared toward obese individuals, and health outcomes and health effects of obesity. Many topics in this subject area also may be relevant to "Nutrition."
33) **Policy / Planning –** This subject area may include topics on administrative and programmatic policy and planning, health policy development at the local, state, and federal level. Other topics including health improvement activities, advocacy, and priority setting techniques may be listed in this area.
34) **Prevention / Promotion –** Various modes of prevention of disease and promotion of healthier lifestyles are included in this area. Course topics may include models of behavior change, health promotion theory, and application of health promotion principles to population health concerns (e.g., physical activity, tobacco).
35) **Program Development –** Related to formulating, improving, and expanding educational, managerial, or service-oriented programs in the public health field. Courses may describe steps in developing programs to address public health issues.
36) **Research Methods –** Courses describe methodology for scientific study of public health issues and interventions.
37) **Sexually Transmitted Diseases and HIV/AIDS –** Courses on the prevention, diagnosis and treatment of diseases that are typically transmitted via sexual contact although other modes of transmission are possible. Examples include HIV, herpes, viral hepatitis, gonorrhea, etc. See also, "Investigation / Inspection Skills."
38) **Substance Abuse (Alcohol Tobacco and Other Drugs) –** Issues surrounding substance abuse such as alcoholism, drug addiction, inhalants, and other substances. Course topics in this subject area focus on the public health implications and population-based efforts to prevent, reduce, and treat substance abuse.
39) **Surveillance –** Issues related to monitoring various health data and populations to determine patterns of emerging disease and other trends. Courses may discuss the importance and methods of surveillance, as well as methods and applications to public health issues. See also, "Epidemiology / Biostatistics."
40) **Terrorism / Emergency Readiness –** Issues concerning how to develop and assess bioterrorism/emergency readiness plans and respond to disasters affecting public health. Courses may cover information on biological, chemical, and physical agents, medical care issues, emergency responsiveness, the role of the clinical laboratory, planning processes, official public statements, and natural disasters (e.g., floods).
41) **Workforce Development –**This category involves issues surrounding training of the entire public health workforce or specific disciplines. Courses may address the use of competencies in developing training, conducting training needs assessments, enumeration of the public health workforce, recruiting and training underrepresented minorities in the health professions, and improving worker performance. This subject does not pertain to "train the trainer" type courses.
42) **Other –** Courses that do not fall under the other subject areas are placed in this category.

Target Audiences

1. Allied Health Professionals
2. Animal Control / Veterinarians
3. Biostatisticians
4. Childcare Providers
5. Communicable Disease Staff
6. Dental Professionals
7. Dietitians
8. Educators / Trainers
9. Emergency Management
10. Emergency Medical Services
11. Emergency Responders / Receivers
12. Environmental Health Professionals
13. Epidemiologists / Surveillance Staff
14. Fire Service
15. General Public Health Staff
16. Hazardous Materials Personnel
17. Health Care
18. Home Care
19. Information Systems Professionals
20. Laboratory Professionals
21. Law Enforcement
22. Mail handlers
23. Medical Examiner / Coroner / Mortician
24. Mental Health Professionals
25. Military Personnel
26. Nurses
27. Occupational Health and Safety Professionals

28. Other
29. Pharmacy Professionals
30. Physicians and Other Clinicians
31. Policy / Planner
32. Public Health
33. Public Information / Media Specialists
34. Public Safety Communications
35. Public Works
36. Researchers / Analysts
37. Social Workers
38. Student
39. Substance Abuse Professionals
40. Teacher / Faculty

Credit Types

- AAFP
- AAVSB/RACE
- Academic Credit
- ACPE
- ADA CERP
- Adv. PDS
- CEC - Dental
- CEM
- Certificate of Attendance
- Certification
- CEU/CE
- CHES
- Childcare Providers
- CLE
- Clock Hours
- CME
- CNE Contact Hours
- Contact Hours (as a credit type)
- Contact Hours of ANCC
- CPHCE
- Developmental Disabilities
- Dietitians CPE
- E-CERP
- Emergency Medical Technician
- EMS
- EMS Physician
- EMT Enhanced
- EMT Instructor
- First Responder
- Florida Clinical Laboratory Personnel Credits
- Instructor Candidate
- Intermediate
- L-CERP
- Licensed Chemical Dependency Counselor
- MCHES
- NREMT
- Nursing Home Administrator
- Other
- PACE
- Paramedic
- PDS
- Pharmacist Contact Hours
- R-CERP
- Registered Sanitarians
- RRT (Registered Respiratory Therapist)
- Social Workers

Format

- Online
  - Web-based Training – Self-study
  - Webcast (on demand)
  - Webstream/Archived Webcast
- Live Event
  - Audioconference
  - Meeting
  - On-Site – Classroom course or workshop
  - On-Site – Conference
  - Satellite Broadcast
  - Tabletop Exercise or Drill
  - Videoconference
  - Web-based Training – Facilitated
  - Webcast (live event)
- Physical Carrier
  - Audio Tape
  - CD-ROM
  - Computer-based Training
  - DVD
  - Other
  - Text-based (print and electronic based)
  - Videotape
- Compilation
  - Blended Learning Series
- Exercises
  - Seminar (Training)
  - Workshop
  - Table Top
  - Game
  - Drill
  - Functional
  - Full Scale

Assigning Course Levels

All course providers must assign one of three skill levels to each course listed on TRAIN. The three TRAIN skill levels—**Introductory**, **Intermediate**, and **Advanced**—are modified from the skill levels use in the Core Competencies for Public Health Professionals (https://www.train.org/DesktopShell.aspx?tabid=94). Using the guidance below, choose the level that best describes your course. For a summary, see the *Quick Reference Chart* on the next page. Please keep in mind that the course hours are meant as a general guide only. Content coverage per competency may vary based on competency selected, target audience, course format, and the level of mastery. The higher the skill level assigned to a course, the more restrictions there are on the number and specificity of competencies that can be assigned to it.

1. **Introductory:** Course provides an introductory topic overview that is appropriate for general or multiple audiences. Typically less than 90 minutes and may offer self-testing of knowledge. It is suggested that a maximum of 10 core competencies be assigned for this level course. Assignment of competencies is optional, and assignment at the domain level ("within domain") is permitted.
2. **Intermediate**: Course provides comprehensive information or skills appropriate for specific job duties of the target audience (e.g., nurses, health educators). This course may provide practice-related exercises and simulations. This intermediate course is typically 90 minutes to eight hours in length. Self-testing or observational feedback must be offered to evaluate skill development. For each competency assigned the general expectation is for about 90 minutes of course content to be covered. A maximum of 10 Core Competencies and five BT/ER Competencies can be assigned for this level course. Assignment of individual competencies is optional.
3. **Advanced**: Course provides intensive instruction, reinforcement of skills, and evaluation against an observable performance standard. Course provides practice-related exercises and simulations. A graded exam, practice, or drill must be offered to verify skills and knowledge learned in the course. This course typically ranges from eight hours minimum to a semester or more in length. This course is geared towards building proficiency and may be part of a larger curriculum with pre-requisites. For each competency assigned the general expectation is for approximately eight hours of course content to be covered. A maximum of five competencies can be assigned for this level course. Assignment of individual competencies, as appropriate, is required for this level of course.

Course Levels - Quick Reference Chart

Below is a summary of the guidance on the previous page regarding selecting skill levels. In selecting a skill level, please keep in mind that the course hours are meant as a general guide only. Content coverage per competency may vary based on competency selected, target audience, course format, and the level of mastery.

After first selecting the skill level, you have an option to assign Core Competencies for Public Health Professionals (Core Competencies). If your course is not competency-based, you should select **Next**.

Suggested Assessment Factors	Intro	Intermediate	Advanced
Skills Practice / Demonstration	Not required	Encouraged	Required
Related to Job Duties of Target Audience	Encouraged	Required	Required
Course Length (Estimated)	30- 90 Minutes*	90 Minutes – 8 Hours*	8 Hours – Semester*
Assignment of Competencies to Course	Encouraged	Encouraged	Required
Number of Competencies	Unlimited*	Up to 10 Core* Up to 5 BT/ER*	Up to 5*
Assessment (Pre / Post)	Not required	Encouraged	Required
Self-Testing or Observational Feedback	Encouraged	Required	Required
Graded Exam / Performance Evaluation	Not required	Encouraged	Required
Credit	Not required	Encouraged	Encouraged
Performance Based Certificate	Not required	Not required	Encouraged

* General content coverage per competency may vary based on competency selected, target audience, course format, and the level of mastery.

Assigning Competencies to Courses

Why Assign Competencies in TRAIN?

The competency sets used in TRAIN have been shortened or condensed to make it quick and easy for course providers to assign them when listing courses. With just a few extra clicks to assign relevant competencies to your courses, everyone benefits—course providers, learners, and public health organizations at all levels.

Competency-based training is in high demand. Most leading public health organizations recommend—or even require—competency-based training for their workforce or grantees. Many public health professionals are assessed according to the competencies used in TRAIN and are looking for courses by competency to help them achieve their learning goals. As the field of public health becomes more competency-driven, courses readily identified with specific competencies will have an edge.

Learners count on TRAIN to find and track courses by competency. Learners can search TRAIN by competency domains and view the individual competencies (if assigned to the course) before selecting a course. After learners complete courses, TRAIN can track course-related competencies in learners' personal transcripts.

TRAIN's competency-based course database supports the public health field. Federal, state, local, academic, and other organizations will rely on the competency data in TRAIN to analyze course availability gaps and course development needs by competency. An accurate assignment of relevant competencies helps public health leaders and funders avoid duplication and know which courses are most important to develop in the future. TRAIN provides a consistent competency framework to which other competency efforts and learning management systems can "map back" their course or learning data, representing the consensus of many academic and practice organizations.

Which Competencies are listed in TRAIN?

Public Health Preparedness Capabilities
Public Health Preparedness and Response Core Competency Model
Core Competencies for Public Health Professionals

The Council on Linkages Between Academia and Public Health Practice (Council) is committed to assisting the U.S. Public Health Service in efforts to implement components *of The Public Health Workforce: An Agenda for the 21st Century* (http://198.102.218.57/phfunctions/pubhlth.pdf) report pertaining to public health competencies. To this end the Council developed a list of Core Competencies for Public Health Professionals. This list represents ten years of work on this subject by the Council and numerous other organizations and individuals in public health academia and practice settings. Their work has been compiled from various source documents and cross-walked with the ten Essential Public Health

Services. This cross-walk ensures that the competencies help build the skills necessary for providing these essential services. For more information on the Council and the Core Competencies please visit the Core Competencies website.

Do Competencies Apply to Every Course?

No. Unless a course is specifically designed to achieve the Core Competencies, course providers should select **Next** and skip the competencies section when entering a course on TRAIN.

Choose "Next" for the Core Competencies if:

- The course provides information updates or skills needed for specific issues (e.g., tuberculosis treatment, Medicaid regulations, or environmental health strategies) and is not meant to build core competencies that can be applied across a variety of public health issues.

Competency-based courses may use other competency sets besides those in TRAIN. PHF currently has no plans to formally integrate additional discipline-specific competency sets into TRAIN. To help learners find courses based on other competency sets, training providers are encouraged to list related competencies in the course description, which learners can search by keyword.

Core Competencies for Public Health Professionals

The TRAIN core competencies are provided by the Council on Linkages. Details about the core competencies are available here: http://www.phf.org/aboutcorecompetencies

Public Health Preparedness and Response Core Competency Model

More information on the Public Health Preparedness and Response Core Competency Model can be found here: http://www.cdc.gov/phpr/documents/perlcpdfs/preparednesscompetencymodelworkforce-version1_0.pdf.

Domain	Competency
Model Leadership	Solve Problems under emergency conditions
Model Leadership	Manage behaviors associated with emotional responses in self and others
Model Leadership	Facilitate collaboration with internal and external emergency response partners
Model Leadership	Maintain situational awareness
Model Leadership	Act within the scope of one's legal authority
Model Leadership	Demonstrate respect for all persons and cultures
Communicate and Manage Information	Manage Information related to an emergency
Communicate and Manage Information	Use principles of crisis and risk communications
Communicate and Manage Information	Report information potentially relevant to the identification and control of an emergency through the chain of command
Communicate and Manage Information	Collect data according to protocol
Communicate and Manage Information	Manage the recording and/or transcription of data to protocol
Plan for and Improve Practice	Contribute expertise to a community hazard vulnerability analysis (HVA)
Plan for and Improve Practice	Contribute expertise to the development of emergency plans
Plan for and Improve Practice	Participate in improving the organizations capacities (including, but not limited to programs, plans, policies, laws, and workforce training)
Plan for and Improve Practice	Refer Matters outside of one's scope of legal authority through the chain of command
Protect Worker Health and Safety	Maintain personal/family emergency preparedness plans
Protect Worker Health and Safety	Employ protective behaviors according to changing conditions, personal limitations and threats
Protect Worker Health and Safety	Report unresolved threats to physical and mental health through the chain of command

Public Health Preparedness Capabilities

More information on the Public Health Preparedness Capabilities can be found here: http://www.cdc.gov/phpr/capabilities/DSLR_capabilities_July.pdf.

Capability	**Function**
Community Preparedness	Determine risks to the health of the jurisdiction
Community Preparedness	Build community partnerships to support
Community Preparedness	Engage with community organizations to foster public health, medical, and mental/behavioral health social networks
Community Preparedness	Coordinate training or guidance to ensure community engagement in preparedness efforts
Community Recovery	Identify and monitor public health, medical, and mental/behavioral health system recovery needs
Community Recovery	Coordinate community public health, medical, and mental/behavioral health system recovery operations
Community Recovery	Implement corrective actions to mitigate damages from future incidents
Emergency Operations Coordination	Conduct preliminary assessment to determine need for public activation
Emergency Operations Coordination	Activate public health emergency operations

Emergency Operations Coordination	Develop incident response strategy
Emergency Operations Coordination	Manage and sustain the public health response
Emergency Operations Coordination	Demobilize and evaluate public health emergency operations
Emergency Public Information and Warning	Activate the emergency public information system
Emergency Public Information and Warning	Determine the need for a joint public information system
Emergency Public Information and Warning	Establish and participate in information system operations
Emergency Public Information and Warning	Establish avenues for public interaction and information exchange
Emergency Public Information and Warning	Issue public information, alerts, warnings, and notifications
Fatality Management	Determine role for public health in fatality management
Fatality Management	Activate public health fatality management operations
Fatality Management	Assist in the collection and dissemination of antemortem data
Fatality Management	Participate in survivor mental/behavioral health services
Fatality Management	Participate in fatality processing and storage operations
Information Sharing	Identify stakeholders to be incorporated into information flow
Information Sharing	Identify and develop rules and data elements for sharing
Information Sharing	Exchange information to determine a common operating picture
Mass Care	Determine public health role in mass care operations
Mass Care	Determine mass care needs of the impacted population
Mass Care	Coordinate public health, medical, and mental/behavioral health services
Mass Care	Monitor mass care population health
Medical Countermeasure Dispensing	Identify and initiate medical countermeasure dispensing strategies
Medical Countermeasure Dispensing	Receive medical countermeasures
Medical Countermeasure Dispensing	Activate dispensing modalities
Medical Countermeasure Dispensing	Dispense medical countermeasures to identified population
Medical Countermeasure Dispensing	Report adverse events
Medical Surge	Assess the nature and scope of the incident
Medical Surge	Support activation of medical surge
Medical Surge	Support jurisdictional medical surge operations
Medical Surge	Support demobilization of medical surge operations
Non-Pharmaceutical Interventions	Engage partners and identify factors that impact non-pharmaceutical interventions
Non-Pharmaceutical Interventions	Determine non-pharmaceutical interventions
Non-Pharmaceutical Interventions	Implement non-pharmaceutical interventions
Non-Pharmaceutical Interventions	Monitor non-pharmaceutical interventions
Public Health Laboratory Testing	Manage laboratory activities
Public Health Laboratory Testing	Perform sample management
Public Health Laboratory Testing	Conduct testing and analysis for routine and surge capacity
Public Health Laboratory Testing	Support public health investigations
Public Health Laboratory Testing	Report results
Public Health Surveillance and Epidemiological Investigation	Conduct public health surveillance and detection
Public Health Surveillance and Epidemiological Investigation	Conduct public health and epidemiological investigations
Public Health Surveillance and Epidemiological Investigation	Recommend, monitor, and analyze mitigation actions

Public Health Surveillance and Epidemiological Investigation	Improve public health surveillance and epidemiological investigation systems
Responder Safety and Health	Identify responder safety and health risks
Responder Safety and Health	Identify safety and personal protective needs
Responder Safety and Health	Coordinate with partners to facilitate risk-specific safety and health training
Responder Safety and Health	Monitor responder safety and health actions
Volunteer Management	Coordinate volunteers
Volunteer Management	Notify volunteers
Volunteer Management	Organize, assemble, and dispatch volunteers
Volunteer Management	Demobilize volunteers

Conferences

The TRAIN conference feature is designed to allow administrators to create as asset for which the course material may cover several days and have several sessions available. This portion of the Course Provider Guide covers how to create and manage a TRAIN Conference.

The Conference Wizard

- To create a new TRAIN conference, go to the **Administration** interface and click the **Courses** list menu; then, click **Conference List** in the list submenu that appears.
    - This will reveal the **Conference List**. Now click the **Add** button atop the **Conference List** page. This will open the **Conference Wizard**.
- To edit an existing conference record, locate the title of the desired conference and click the **Pencil** icon next to the title to open the **Conference Wizard** interface

Within the **Conference Wizard**, on the right side of the page, you will notice the **Conference Wizard Navigation** list menu. In this portion of that handbook we will work through each of these options.

First, let us discuss the buttons which will be available at the bottom of the page throughout the wizard:

- **Previous**
    - This button is available on every page, except the first.
    - Clicking this button will move you back one step in the wizard.

    - For example, if you are in the Travel & Lodging portion of the wizard, and you click the **Previous** button, you will be taken to the, immediately previous, Sessions portion, which is the last subsection of the Session Information section.
- **Next**
    - This button will advance you to the next portion of the wizard.
    - If you attempt to move to the next portion using the **Next** button, but you have not provided all the required information for the page you are currently on, you will receive an error and will not advance to the next session.
- **Delete**
    - Clicking this button will obliterate all progress on the current conference. The conference will be removed from the **Conference List** page and all data for the conference will be irrevocably deleted from TRAIN.
- **Save & Finish Later**
    - Using this button will save your current progress on the open conference and will close the **Conference Wizard**.
    - If you attempt to use the **Save & Finish Later** button, but have not provided all required information for the page you are currently working on in the wizard, the system will return an error and your conference will not save; but rather will remain open. To remedy this, use the red error messages to guide you to where more information is required.
    - After the conference has been approved, this button will change from **Save & Finish Later** to simply, **Save**. The functionality is the same, but because the conference has already been completed and approved, there is no need to finish later.
- **Cancel**
    - This button will cancel all progress made in the current instance of the **Conference Wizard**, the information entered will not be saved and the wizard will close.

1. **General Information**
    a. By default, this portion of the wizard will be selected when you add a new conference or edit an existing conference.
    b. Required information – this information must be entered into the named fields before you can advance to the next section of the wizard using the **Next** button.
        i. You must provide a **Conference Name**
        ii. You must provide a **Sponsor/Offer**
        iii. You must provide a **Description**
    c. **Details**

i. Here you will enter what can generally be considered availability *data.* This includes, when the conference takes place, the registration deadline and the time zone; as well as, some of the display options for the conference.

ii. Required information – this information must be entered into the named fields before you can advance to the next section of the wizard using the **Next** button.

   1. Conference **Start Date**
   2. Conference **End Date**
   3. Conference **Time Zone**

iii. Other data – this information may be entered at the provider's discretion; however, it is important to note that some of these options may be selected by default.

   1. **Attend Capacity/Seat Limit** – If you wish to limit the number people who may attend this conference, enter that number in the **Attend Capacity/Seat Limit** field.
   2. **Auto complete all sessions when user completes conference in My Learning interface –** When this option is off, for a user to complete a conference, they will need to update each individual session as completed before marking the overall conference as complete. When this option is on, the user may simply update the overall conference to complete and any conference sessions the user is registered for will also automatically update to complete
   3. '**Show In Learning Calendar**' – Select this option if you would like the conference to appear in the TRAIN **Learning Calendar**. By default, this option will not be selected.
   4. **Prevent Early Completion** – Selecting this option will prevent users registered for the conference from changing their course registration status until the conference date has passed. By default, this option will not be selected.
   5. **Allow user to register for overlapping sessions** – If the Conference has multiple sessions scheduled at overlapping times, checking this option will allow the user to register for session times which may conflict, although the user will still be notified of the overlap. Unchecking this option will prevent the user from registering for any overlapping sessions within the conference.
   6. **Active** – This option allows providers to make the conference active or inactive. An active conference will appear in usual lists such as, search results and the TRAIN **Learning Calendar**. An inactive conference will

only appear in the **Conference List** as accessible via the Administrative interface (i.e., the access instructions at the beginning of this section). **Please note –** some administrators also feel that it is important to make conferences as inactive after the conference has been completed. Doing this will prevent the conference from appearing to TRAIN users. Your conference can be deactivated by deselecting the 'Active' checkbox on the second page of the Conference Edit Wizard.

d. **Contacts**

   i. Here you will enter the contact information for the conference. The information entered here will allow users to contact the appropriate person should the user have any questions concerning the conference.

   ii. To do add a new contact, click the **Add Contact** button.

      1. This will reveal the **Add Contact** interface.
      2. To add a contact, you must supply all required information.
         a. Enter the contact's name in the **Name** field.
         b. Enter the contact's phone number in the **Phone** field.
         c. Enter the contact's email address in the **Email** field.
      3. Although a contact website is not required, if there is an appropriate website for the contact, enter this information in the **URL** field.
      4. Click the **Add** button once all required contact information has been supplied.
      5. Click the **Cancel** button to abort adding a contact and return to the previous screen.

   iii. To edit an existing contact, click the pencil icon next to the appropriate contact's name. This will allow you to edit all aspects of the contact information.

   iv. When you have made the necessary edits, click the **Save**  icon to save the changes. If you choose not to save the changes you have made, click the **De-Pencil**  icon and the information will revert to its previous state.

   v. To delete a contact, click the **Delete** icon.

2. **Location Information**

   a. Conferences will usually take place at some location, such as a hotel or convention center.

   b. Here you will enter the location information for your conference. Conferences do not require that location information be entered for them; however, if you have location data, it is a good idea to enter it.

   c. There are two methods by which you can add location information for your conference.

d. The **Add Location** button.
    i. Clicking this button will reveal the **Add new Location** interface.
    ii. To enter a new location, you must provide the following information.
        1. Enter the location's title, in the **Title** field.
        2. Enter the location's address in the **Address** field. If the Address requires two lines, use the **Address 2** field to supplement the first **Address** field. Note that the **Address 2** field is not required.
        3. Enter the location's city in the **City** field.
        4. Select the location's country from the **Country** dropdown menu. Notice that United States is the first option in the dropdown menu.
        5. Select the location's state from the **State** dropdown menu.
        6. Enter the location's zip code in the **Zip** field.
        7. Enter a telephone number for the location in the **Phone** field.
    iii. You can also enter telephone number extension information into the **Extension** field, though this data is not required.
    iv. Click the **Add** button once all required location information has been supplied.
    v. You should now see your location listed on the **Location Information** page.

e. The **Batch Upload** button.
    i. You can also upload, or Batch, several locations into one conference.
    ii. To do so, click the **Batch Upload** button and then click the **Download Template** button on the page that follows. This will download the **Location Upload Template** to your computer.
        1. The information required for the batch upload is the same as the required information for the single location procedure mentioned above.
        2. Additionally, it is required that you include information on which room at the location in which the conference will take place. These are the last two columns of the batch template. Under **Room Title** simply enter the name of the room as you want users to see it. In the description column, you can enter a description of that room.
    iii. Once you have entered the required and desired information into the **Location Upload Template** simply resave the file to your computer and click the **Browse** button in the wizard on the **Batch Upload** page. Then select the file you just saved and click the **Next** button.
    iv. The system will then take a moment to upload your location information. When this process is complete, the page will display a **Completed** message indicating as such. When the **Completed** message displays, click the **Next** button.

v. The following page will indicate some information about the upload; and whether or not the upload was successful. Success of the upload will be indicated in the **Status** column.
    1. If the **Status** column does not indicate **OK** then there is something wrong with the information you attempted to upload.
    2. These errors will be displayed in the **Check** column. If this is the case, please reopen the CSV file from your computer and correct the necessary data as indicating by the **Check** column.

vi. If you wish to repeat the upload process, click the **Upload one more file** button.

vii. If you would like a log of the upload process which has taken place, click the **Download log file** button.

viii. You should now see your locations listed on the **Location Information** page.

f. After you have added your locations, either with the **Add Location** button or **Batch Upload** button, you should see a list of the locations available for this conference listed on the 'Location Information' page of the **Conference Wizard**.

g. Next to each location there is an **Add Room** button. It is not required that you add rooms for your locations; however, if this information is available, it is suggested that you do add it.

  i. To add a room to your conference locations, click the **Add Room** button next to the appropriate location.

  ii. On the **Add Room** page that follows, enter the following required information.
    1. Enter the title of the room or room number in the **Title** field.
    2. Enter a description of the room (e.g., room contents) into the **Description** field.

  iii. After all required information has been entered, click the **Add** button. This will return you to the **Location Information** screen where you should now see the room listed next to the appropriate session.

  iv. You can also click the **Cancel** button to exit the **Add Room** interface without saving the information at any time.

h. Next to each location and location room you will notice the standard **Pencil** and **Delete** icons. Use these icons to edit or delete a location or location room.

3. Competencies

a. The competencies section allows Course Providers to assign one or more Public Health Core Competencies to their conference.

b. Competencies are displayed by tier and domain.

c. You may select individual competencies under each domain or you may select the domain itself, which has the same effect as selecting all competencies within that domain.
d. Competencies assigned here will help users search for the conference. Assigning competencies to the conference allows the conference to appear in the Course Search by Competency results.

4. **Conference Certificates**
    a. If you wish to add a certificate to the conference, do that here.
    b. Certificates are designed to allow administrators the ability to provide their users with a printable certificate verifying the learner's conference attendance.
        i. To assign a certificate, go to the **Certificates** portion of the **Conference Edit Wizard**, click the **Assign Certificates** button, and select from the radio buttons atop the page which certificates to display in the dropdown menu titled **Certificate Type**. Your options include:
            1. **Show My Personal Certificates** – this will cause only certificates your have created to display.
            2. **Show All Public Certificates** – this will display all public certificates created both by you and other TRAIN certificate administrators.
        ii. After you have selected from the radio buttons which certificates to display, you will need to choose a certificate from the **Certificate Type** drop-down menu.
            1. You may define a **date range** for the certificate.
                a. The certificate date range pertains to the user completion date for the conference.
                b. If the user's completion date for the conference falls within the date range, that user will receive the selected certificate.
                c. Note that start and end date are not required. If no date is provided for these values, the date range on the certificate is considered "open ended" and users will receive the certificate no matter what their completion date is.
                d. Changes to start and end dates for the certificate are not retroactive. If a user has already received a certificate, changing the date range will not remove that certificate.
            2. You may define a **credit type** for the certificate
                a. The credit type pertains to the credit selection the user makes when first registering for the conference.

b. If the certificate is assigned to the same credit type that the user has selected for their registration, they will receive the corresponding certificate.

3. If provided, both date range and credit type requirements must be met for the user to receive the certificate

5. **Session Information**
    a. Here you will enter the information for your conference sessions.
    b. The first step is to indicate whether or not you would like to use **Tracks** to identify which session a user should attend if that use is following a particular learning track or curriculum of material. You will need to indicate **Yes** or **No** for the use of tracks.
    c. Once this indication has been made, click the **Next** button to proceed.
    d. **Tracks**
        i. If you have selected **No** in the previous section, indicating that the conference will not use tracks, then you will skip this step. If you have selected **Yes** in the previous section, then you will need to take this step.
        ii. The **Tracks** interface is simple and has only one important button and one list.
        iii. The **Add Track** button.
            1. Clicking the **Add Track** button will redirect you to the **Add Track** interface.
            2. In the **Add Track** interface, you must indicate the following.
                a. Enter the track name in the **Name** field.
                b. Select a color for the track from the **Color** dropdown menu. Although it is not required, it is strongly recommended that you choose a different color for each track.
            3. After all required information has been entered, click the **Save Track** button to return to the **Tracks** interface.
        iv. The **Tracks** list
            1. This list will display all tracks which have been added for this conference.
            2. You can use the standard **Pencil** and **Delete** icons to edit and delete tracks as necessary.
    e. **Sessions**
        i. This is one of the most important parts of the **Conference Wizard**. It is also one of the more complex aspects of the **Conference Wizard**.
        ii. You will notice that there is a session list on this page. This list is broken into days. These days are determined by the information entered in the **General Information → Details** Interface (please see 1.c above.).

iii. Next to each day is an **Add** button. Click the **Add** button to begin adding a session for the day to which the **Add** button is next.

iv. The **Add Conference Session** Interface.

1. Notice, after clicking the **Add** button next to a particular day, TRAIN will redirect you to the **Add Conference Session** interface. This interface is broken down further into several tabs, with like information per tab.
2. Here we will breakdown the **Add Conference Session** interface per tab.
3. It is important to note that you will not be able to move to another tab until the currently viewed tab has all required information in place. You can move from tab to tab, assuming all required information has been provided, by simply clicking on the tab you wish to view.
4. The **Description** tab
    a. This tab will be selected be default when you add or edit a session.
    b. You must provide the following required information for this tab.
        i. Enter the name of the session in the **Session Name** field.
        ii. Enter a starting time and an ending time in the **Start Time** and **End Time** fields. Or, you can use the **Time Picker** icon to select the necessary time for the appropriate field.
        iii. Indicate if there is any extra cost for the session in the **Extra Session Cost** field. If there is no cost for the session, enter **0** in this field.
    c. Indicate if there is any extra cost for the session in the **Extra Session Cost** field. If there is no cost for the session, enter **0** in this field.
    d. If the session will have a seat limit, enter this number in the **Seat Limit** field. This information is not required.
    e. If the session is going to be required for all users at the conference, check the **Mandatory** box. This information is not required.
    f. If the session will have a certificate independent of any and all conference certificates, select the certificate for this session from the **Certificate** dropdown menu. This information is not required.
    g. Lastly, the **Active** checkbox. If this box is checked, which it will be by default, the session will appear in the usual places through

the TRAIN site. If the session is not **Active** the information for this session will only be accessible via the **Administration** interface.

5. The **Locations** tab
    a. The only information for this tab pertains to the location assignment for the session.
    b. You must choose at least one location or the **Location To Be Assigned** option. **Location To Be Assigned** will be selected by default.
6. The **Credit Types** tab
    a. Under this tab, you can add credit types which you would like to have associated with the session.
    b. The **Add Credit Type** button
        i. Click this button to add a credit type to the session. Note that it is not necessary that any session have a credit associated.
        ii. You must select a credit type from the **Credit Type** dropdown menu.
        iii. If you wish, you can add an amount to the credit in the **Amount** field.
        iv. Once all required information has been entered, click the **Save Credit Type** button to add the credit to the list of credits available for this session.
    c. The **Credits** list
        i. This list will display all credits which have been added to this session.
        ii. You can use the standard **Pencil** and **Delete** buttons to edit and delete credits for this session as necessary.

7. The **Tracks** tab
    a. This tab contains only a list of the tracks which have been created for this session (see section 4.d above).
    b. To assign a session to one or more tacks, simply select the checkbox next to the appropriate tracks.
    c. Note that a session can have none, one or several assigned tracks.
8. The **Materials and Presenter Information** tab

a. Before you can make any progress on this tab, you will need to click the **Save** button at the bottom of the screen. After the session has saved, you will need to reselect the tab.
b. This tab will contain the data for any presenters through whom you want to promulgate information at your session.
c. The **Presenter** dropdown menu will contain a list of all presenters available for this session. Selecting a presenter will send a notice to them that you have requested their abilities for this session.
d. You can choose to display all presenters in the dropdown menu, or only those from your state, by selecting or deselecting the **My State Presenters Only** checkbox. By default, this box will be checked.
e. If you wish to upload additional documents for this session, click the **Upload Additional Materials** button.
    i. This will reveal the **Conference Session Additional Materials Upload** interface.
    ii. To upload additional materials, you must provide a name for the materials in the **Name** field.
    iii. You must also select the materials for upload from your local computer using the **Browse** button.
    iv. If the additional materials have a description which will be helpful to other users, enter that information in the **Description** field.
    v. Once all required information has been entered into the interface, click the **Upload** button. You will then see your additional materials listed, by name, under the **Presenter** dropdown menu.
    vi. The usual **Delete** icon is available for all additional materials; however, you cannot edit an individual additional material. You must first delete it and then re-upload the material.

9. The **Custom Fields** tab
    a. This tab contains one button to add a **New Custom Field**.
    b. Clicking this button will reveal the **Custom Field** interface.
        i. Required data for a custom field only includes a **Description**.

ii. However, you also have the option to make the custom field **Mandatory**.
iii. To save a new custom field, click the **Add** button.

c. After the new custom field has been added, it will appear in a list under the **Custom Fields** tab with the usual **Pencil** and **Delete** icons for editing and deleting the field.

10. **Waitlist**
    a. This option is only available for MI Course Providers.
11. **Core Competencies**
    a. The competencies section allows Course Providers to assign one or more Public Health Core Competencies to their session.
    b. Competencies are displayed by tier and domain.
    c. You may select individual competencies under each domain or you may select the domain itself, which has the same effect as selecting all competencies within that domain.
    d. Competencies assigned here will help users search for the conference. Assigning competencies to the conference allows the conference to appear in the Course Search by Competency results.

v. Once you have entered all required information for a session, click the **Save And Back** button. The session will now appear under the appropriate day in the **Conference Sessions** interface.

vi. The **Batch Upload** button.

1. You can also upload, or Batch, several sessions into one conference.
2. To do so, click the **Batch Upload** button and then click the **Download Template** button on the page that follows. This will download the **Session Upload Template** to your computer.
    a. The information required for the batch upload is the same as the required information for the single session procedure mentioned above.
3. Once you have entered the required and desired information into the **Session Upload Template** simply resave the file to your computer and click the **Browse** button in the wizard on the **Batch Upload** page. Then select the file you just saved and click the **Next** button.
4. The system will then take a moment to upload your location information. When this process is complete, the page will display a **Completed**

message indicating as such. When the **Completed** message displays, click the **Next** button.

5. The following page will indicate some information about the upload; and whether or not the upload was successful. Success of the upload will be indicated in the **Status** column.
    a. If the **Status** column does not indicate **OK** then there is something wrong with the information you attempted to upload.
    b. These errors will be displayed in the **Check** column. If this is the case, please reopen the CSV file from your computer and correct the necessary data as indicating by the **Check** column.
6. If you wish to repeat the upload process, click the **Upload one more file** button.
7. If you would like a log of the upload process which has taken place, click the **Download log file** button.
8. You should now see your sessions listed on the **Sessions** list.

vii. After you have added your sessions, either with the **Add** button or **Batch Upload** button, you should see a list of the sessions available for this conference listed on the **Sessions** page of the **Conference Wizard**.

viii. Sessions which have been properly entered into TRAIN will appear under the **Conferences Sessions** list. Next to each session will be the usual **Pencil** and **Delete** icons. Also next to each session will appear the **Assessment** and **Evaluation** icons. These icons can be used to add an assessment or evaluation to the conference session.

f. **Breakout Session Sets**

i. Breakout Session Sets allow providers to select a set of sessions that a user must choose from. The user will be able to choose one session from the defined set of sessions in the Breakout Session Set

ii. To add a Breakout Session Set to the conference, click the **Add** button in the Breakout Session Set subsection of the Session Information section within the conference wizard.

iii. Give the set a **Name** and define its **Mandatory** status.

1. If the Breakout Session Set is mandatory, users registering for the conference *must* select one session from that set.
2. If the set is not mandatory, users may skip the set when registering for the conference.

3. If you want to attach this set to a specific Track, select the appropriate Track from the available list (if there are no Tracks for the conference, the Tracks list will be empty).

iv. Click the **Save Set** button to save the new Breakout Session Set.

v. Then, in the Sessions subsection of the Session Information section of the conference edit wizard, you will see a separate schedule list that represents the Breakout Session Set. This will be in addition to the normal session schedule list.

1. Click **Add** next to the appropriate day in the Breakout Session Set and add the session details as normal.
2. Note that sessions added to a Breakout Session Set, cannot be mandatory. Only the Breakout Session Set itself can be mandatory.

vi. Once all Breakout Session Sets and sessions are added, click **Next**, to move to the next step in the conference wizard.

6. **Travel & Lodging**

a. You can enter information pertaining to local travel and lodging arrangements for your conference in this portion of the wizard. Generally, this information will give the address and name of a hotel or plaza where the conference attendees can stay throughout the conference. For communication purposes here, location will be referred to as a travel and lodging asset.

b. To add travel and lodging information, click the **Add Travel & Lodging Information** button.

c. This will reveal the **Add New Travel Info** interface.

d. In this interface, the only required information is the name of the travel and lodging asset. This information must be entered into the **Name** field.

e. Other, optional information for a travel and lodging asset includes:

i. **Location Type** – Enter information about what kind of travel and lodging location this is (e.g., Hotel).

ii. **Description** – Enter a description of the travel and lodging asset.

iii. Use the **Address 1**, **Address 2**, **City**, **Country**, **State**, and **Zip** fields to enter general address information for the travel and lodging asset for your conference.

iv. If the travel and lodging asset has a coupon offer, enter that information in the **Coupon Code** field.

v. Enter a website address for the travel and lodging asset in the **URL** field.

f. After you have entered the required and desired info for you travel and lodging asset, click the **Add** or **Update** button. Or, you can click the **Cancel** button at any time to return to the previous screen.

g. Once you have added a travel and lodging asset for the conference, that information, plus any additional travel and lodging information you may choose to enter, will appear on the **Travel & Lodging** list. Next to each travel and lodging asset will be the standard **Pencil** and **Delete** icons.

7. **Additional Materials**
   a. In this portion of the wizard you can add any additional materials you want accessible to all conference attendees.
   b. To add materials, click the **Upload Additional Materials** button.
      i. This will take you to an upload interface.
      ii. To upload materials, you must provide a name for the materials in the **Name** field.
      iii. You can also provide a description of the materials in the **Description** field. This information is not required.
      iv. You will also need to choose the files to upload using the **Browse** button.
      v. Once you have provided a name for the materials and have chosen the correct file to upload, click the **Upload** button. This will upload your materials and will return you to the previous page. You can also exit the upload interface without making an upload by clicking the **Cancel** button.
   c. Once your materials have been uploaded, they will appear in the **Additional Materials** list. Next to each additional material file, there will be the standard **Delete** icon. There is no edit icon for the items in the **Additional Materials** list. To edit the materials you have uploaded, you will need to delete the faulty file, make the edits on the file on your computer and then re-upload the files.

8. **Required Information/Forms**
   a. In this portion of the wizard, you can enter any additional information which the conference attendees will need to have. You will have the option to make this information required or not.
   b. To create a custom field in which to store the required information, click the **New Custom Field** button.
      i. This will reveal the **Custom Field** interface.
      ii. In this interface, all information will be entered into the **Description** field.
      iii. If the information in the **Description Field** is required for every conference attendee, select the **Required** checkbox. By default, this checkbox will not be selected.
      iv. Once all desired and required information has been entered, click the **Add** or **Update** button. Or, you can use the **Cancel** button to exit the interface without adding a custom field and return to the previous screen.

c. Once you have entered a custom field, that, and any additional fields you may have added, will appear in the **Required Information/Forms** list. Next to each custom field entry there will be the standard **Pencil** and **Delete** icons.

9. **Cost & Payment Information**
   a. In this portion of the wizard you can enter any information pertaining to the costs and payments associated with the conference.
   b. The only information required for this screen is the **Cost** field. Enter the cost of the conference for attendees in the field. If the cost is nothing, enter zero in the **Cost** field.
   c. You can also provide a description of the cost (e.g., informational packet fee) so attendees will know more precisely what the money is being used for. This information is not required.
   d. If the cost information is available on a website outside of TRAIN, you can enter the address for that website in the **URL** field. This information is not required.
10. **Visibility**
    a. Here you will choose which TRAIN groups can search for and see the conference.
    b. You must select at least one group from the tree for visibility.
11. **Confirmation Text**
    a. When a user registers for a conference or is approved (if necessary) for a conference, they will receive a confirmation email indicating their successful registration for the conference.
    b. You *must* provide a confirmation text which will be added to the notification email. Provide this confirmation text in the **Confirmation Registration Text** field.
12. **Confirmation Screen**
    a. You can use this screen to review all the data for the conference. However, you cannot edit the information from this screen. To edit any piece of information for the conference, you will have to use the navigation links on the left to return to the appropriate section.
13. **Submit for Approval**
    a. This screen will display the approval status of your conference.
    b. If you are creating a new conference (versus editing an already existing one) you will need to submit the conference for approval. Only submit a conference for approval after you have entered all required information for the conference, else you will receive an error indicating incomplete data. To submit the conference for approval, simply select **Yes** for the **Do you want to submit this conference for approval** option and click the **Finish** button.
    c. It is important to note that once you submit a conference for approval, you will not be able to edit any of the conference data until the conference is either approved or denied.

Managing and Reporting Conferences

After you have created a conference, it will need to be approved by the appropriate TRAIN administrator. Once the conference is approved (or denied) you will receive an email notice indicating as such. The same will be true if the approval administrator has any questions about the conference.

Once your conference is approved, you will, most likely, have to manage and report the conference. Here we will cover the basics of these two tasks.

1. **Managing the Conference**
    a. After a conference has been approved, both administrators and users alike will be able to search for the conference in the normal **Course Search** interface
    b. Administrators will also be able to access their conference in the **Administration** interface.
        i. To access your conference in the **Administration** interface, click the **Courses** list menu link.
        ii. Then click the **Conference List** submenu link.
        iii. This will reveal a list of all conferences for which you have administrative rights. To manage your conference, simply locate the conference title in the **Conferences** list.
            1. To manage the conference from the **Conference Wizard** click the standard **Pencil** icon.
            2. To add an assessment or evaluation, click the **Assessment** or **Evaluation** icon.
            3. To view the roster for the conference, click the **Roster** icon. On the conference roster, you can also download printable schedule forms for each user. This form will show what sessions/locations each user is signed up for. The intention here is to provide an easy, convenient way to distribute participant schedules within the conference.
        iv. It is helpful to note that the roster, assessment and evaluation features for the conferences will act and respond like they do for normal courses.

2. The **Report** interface for conferences is the same as that for courses. The conference reports will be accessible in the same fashion as are the course reports and will actually appear in the same lists.

3. For example, you can run a **Course Roster** report for a conference, in the exact same fashion you would for a course. You simply have to locate the correct conference name is the drop-down list of courses/conferences.

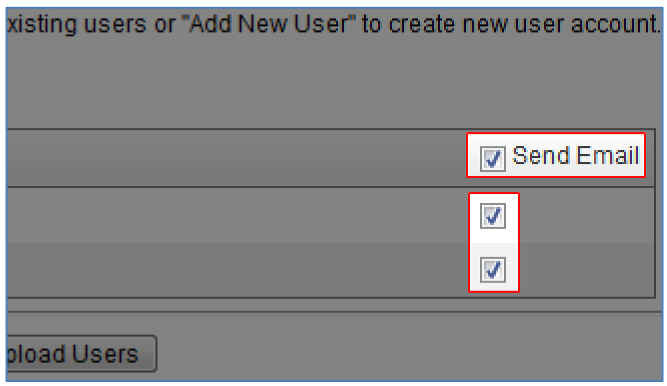
User Schedule Exports

Also available in the conference roster is the option to export user schedules. This will provide a PDF with each user's session list, time and location. The PDF provided will give all user schedules, available by page.

Conference Batch Registration

Batch registration is available for both conferences and courses. However, the batch registration process is slightly different between the two. For a normal conference registration, users must first access the overall conference and the register for individual sessions. This is reflected in the batch registration process. Administrators will only be able to batch register users for the overall conference. It is still the responsibility of the user to select their sessions and finalize their registration.

To access batch registration for a conference, you must do so with the same account used to create the conference. If you do not have access to the account that created the conference, you will not be able to batch register users for that conference.



Email Notifications

In the batch registration process, there is an option to 'Send Email'. If you leave this option selected, when you finalize the registration, an email text window will appear. Use this text window to send an email to the users included in the batch registration. You can select to send an email to all users or individual users by toggling the email option checkbox to the right of each user.

Batch Registration for Existing Users

Similar to courses, for conference batch registration, you can search for and include existing users.

TO BATCH REGISTER EXISTING USERS FOR A CONFERENCE:

1. Access *either*:
   a. The 'Registration' tab of the Conference Details.
   b. Or, the Overall Conference Roster.
2. Click the 'Batch Registration' button
   a. This will reveal the batch registration options.
   b. You will also see an empty list of users to be batch registered for the conference. This list will populate as you select users to batch register for the conference.

3. Click the ‘Add existing Users’ button.
    a. This will reveal a last name search interface.
    b. If you know the last name of the user you are looking for, simply enter their name in the search field and click ‘Search’.
    c. You can also search by group. To do so, expand the group structure using the expand icons (+) next to each group. Then, select the group name (the actual name of the group, not the icon next to it) you wish to search in, leave the ‘Last Name’ field empty and click, ‘Search’. This will return a list of all users in the selected group.
4. Your search, either by last name or group, will return a list of matching users. Use the checkboxes, to the left of the user name, to select certain users for batch registration.
5. After you have selected the appropriate users, click the ‘Add selected users’ button. This will add those users to the previously empty list we saw a few steps ago.
6. You can repeat this process as many times as needed. Once your list of users to register is complete, use the ‘Register’ button to finalize the batch registration and add the users to the course roster.

    Note: At this point, the user will need to complete their conference registration by picking their individual sessions. If users do not take this final step, they will not be fully registered for the conference.

Batch Registration for New Users

Similar to courses, for conference batch registration, you can create new users accounts.

TO BATCH REGISTER NEW USER ACCOUNTS FOR A CONFERENCE:

1. Access *either*:
    a. The ‘Registration’ tab of the Conference Details.
    b. Or, the Overall Conference Roster.
2. Click the ‘Batch Registration’ button.
    a. This will reveal the batch registration options.
    b. You will also see an empty list of users to be batch registered for the conference. This list will populate as you select users to batch register for the conference.
3. Click the ‘Add new User’ button.
    a. This will reveal the Add/Edit New User interface.
    b. The information you provide here will be used to create a new account for the user.
    c. Be sure to provide all required information, including: login name; first name; last name; email; and group assignment.
4. Once you’ve entered the information for the new user account, click the ‘Save’ button.
    a. This will return you to the batch registration list that was previously empty.
    b. The new user account you just created should appear in this list.

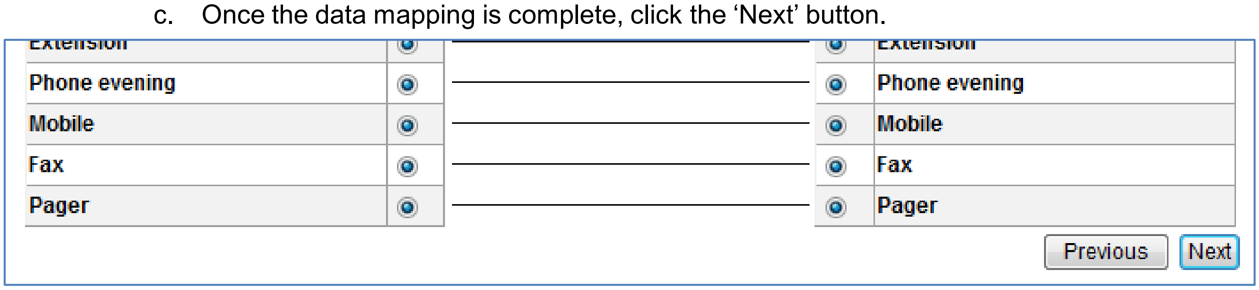
5. You can repeat this process as many times as needed. Once your list of users to register is complete, use the ‘Register’ button to finalize the batch registration and add the users to the course roster.
   Note: At this point, the user will need to complete their conference registration by picking their individual sessions. If users do not take this final step, they will not be fully registered for the conference.

Batch Registration for Uploaded Users

Similar to courses, for conference batch registration, you can upload new user accounts

TO BATCH REGISTER UPLOADED USER ACCOUNTS FOR A CONFERENCE:

1. Access *either*:
   a. The ‘Registration’ tab of the Conference Details.
   b. Or, the Overall Conference Roster.
2. Click the ‘Batch Registration’ button.
   a. This will reveal the batch registration options.
   b. You will also see an empty list of users to be batch registered for the conference. This list will populate as you select users to batch register for the conference.
3. Click the ‘Upload Users’ button.
   a. This will reveal link to the TRAIN user upload template.
   b. You will also see a ‘Browse’ button. Use this function to browse to the update file on your local drive.
4. If you download the upload template, you can create new user accounts by providing data in the required columns. Required columns are listed in red.
5. Once you have completed your upload template, use the ‘Browse’ button to locate the file on your local drive and click the ‘Next’ button.
6. This will take you to a data mapping page of the update template.
   a. If you have not changed any of the columns in the upload template, they will automatically map to the correct data elements within TRAIN.
   b. If you are using a custom upload template, take this time to map your custom columns to the existing TRAIN data elements.
   c. Once the data mapping is complete, click the ‘Next’ button.



7. The following screen will be a summary screen of the uploaded users.

   a. This screen will identify user accounts that have been successfully created and those which may have problems.
   b. The system will also notify you of seemingly potential duplicate accounts. If you see a potential duplicate account, but what to allow it anyhow, select the ‘Allow’ option to the left of the summary list.
   c. If you are pleased with the summary of accounts, click the ‘Next’ button.
8. You will next assign the uploaded accounts to a group.
   a. Expand the group structure as needed.
   b. Use the checkbox options to the left of the group listings to assign users to the appropriate group.
   c. Keep in mind that all users in the same upload will be assigned to the same groups.
   d. Once your groups are selected, click the ‘Next’ button.
9. You can repeat this process as many times as needed. Once your list of users to register is complete, use the ‘Register’ button to finalize the batch registration and add the users to the course roster.

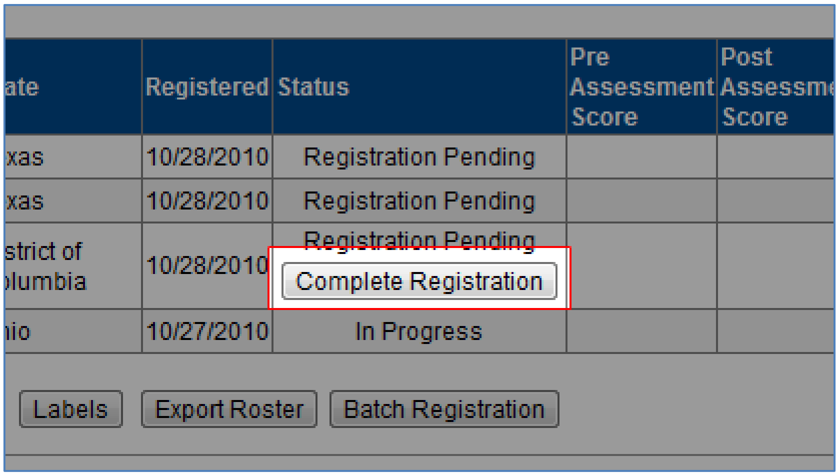
   Note: At this point, the user will need to complete their conference registration by picking their individual sessions. If users do not take this final step, they will not be fully registered for the conference.

Forcing Completion for Conference Registrations

Registering for a conference, from the user perspective, is multi-step process. Often, users will get to the last step of the registration process, but will forget or fail to confirm their registration. This function allows administrators, who otherwise have access to the conference roster, to “force” pending registrations to “in progress”. This is only available for pending registrations where the user has reached the last step of the registration.

TO FORCE PENDING CONFERENCE REGISTRATIONS TO A STATUS OF IN PROGRESS:

1. Access the overall conference roster.
2. Deselect the option to ‘Filter Pending Registrations’. .
   a. This will reveal all registrations that have not yet been completed
   b. If a pending registration is ready to be confirmed, a ‘Complete Registration’ button will appear in the appropriate row.
   c. If a registration is pending, but the user has not reached the last step of the registration process, this option will not be available.
3. Locate the registration you wish to complete (“completing” a registration will move it to a status of “in progress”).
4. Click the ‘Complete Registration’ button in row with the appropriate user.
   a. The user is now fully registered for the conference.



Custom Certificates

eLMS now offers administrators the ability to create their own certificates. Administrators can upload an image and place the needed text fields within that image to create the certificate. The certificate can then be assigned to courses and printed by users.

Accessing Custom Certificates

To access Custom Certificates, the administrator must have the *Course Certificate Manager* or *Course Provider* role assigned to their account.

To Access Custom Certificates:

1. Login as a *Course Certificate Manager* and select the **Administration** tab.
2. Select the **Courses** list menu item and then the **Certificates** sub list menu.
3. This will reveal the 'Certificates' interface. This interface consists of a 'Certificate Type' list and a 'Show only my certificates' checkbox filter.
   A. The 'Certificate Type' list displays all certificates that are available to you according to your user roles and page filters.
   B. The 'Show only my certificates' checkbox filter, if checked, limits the 'Certificate Type' list to only those certificates that you have created. If it is unchecked, you will have access to all public certificates as your user roles dictate. By default, this filter is checked.
4. The 'Certificates interface also includes an **Add Certificate Type** button and, if there are existing certificates, an **Edit** icon (); we will cover these later.

Creating a New Custom Certificate

Administrators can use these steps to create new Custom Certificates. These certificates can then be assigned to courses which users can print once they have completed the course. Assigning a Custom Certificate to a course takes place with the 'Course Edit Wizard' interface.

TO CREATE A NEW CUSTOM CERTIFICATE:

1. Access the 'Certificates' interface as described above.

2. Click the **Add Certificate Type** button.
    A. This will reveal the 'Edit Certificate' interface. This interface has three tabs: **Details**, **Design** and **Visibility**.
    B. The 'Edit Certificate' interface also has three standard buttons: **Save**, **Save and Back** and **Cancel**. At any time, you can click:
        I. The **Save** button to save your progress;
        II. The **Save and Back** button to save your progress and return to the previous interface;
        III. The **Cancel** button to return to the previous interface without saving your progress.
    C. When adding a new certificate, you must *first* provide all data for the **Visibility** and **Details** tabs, before moving to the **Design** tab.

3. Select the **Visibility** tab. Here, you determine exactly who has access to the certificate.
    A. If the certificate should only be accessible for you the creator, select the 'Private Certificate' checkbox, then select a group from the grouping tree (most often, with a private certificate, it makes sense to select the highest possible group).
        I. If you select this option, you will be the only administrator with access to this certificate for course assignment.
        II. You will be able to assign the certificate to any course also assigned, or available to, the same groups and subgroups as the certificate (i.e., the certificate is available for all subgroups of the explicitly assigned group, as are courses).
    B. If the certificate should be available to other administrators with the *Course Certificate Manager* role, use the grouping tree to limit the visibility of the certificate. For this option:
        I. The certificate will be available for *course assignment* to all *Course Certificate Manager* administrators *below* the group assignment;

II. However, the certificate will be available for *edit* to all *Course Certificate Manager* administrators *above* the group assignment.

4. Select the **Details** tab:
   A. Enter a name for the certificate into the 'Certificate Name' field.
   B. The 'Active' checkbox controls the overall availability of the certificate. If this box is not selected, the certificate will not be available to other administrators nor for assignment to any courses. By default, the 'Active' box is not selected. If you are creating a new certificate, leave this box unchecked until you have completed the new certificate; at which point you can edit the certificate and make it active.
   C. The 'Uploaded Certificate Image' field lists what image the certificate is currently using. If you are creating a new certificate, this field will be blank until an image has been uploaded.
      I. Once an image is uploaded, there will also be a **Delete** button. Selecting this button will remove the image you have uploaded from your certificate.
   D. The 'Upload New File' field lists the image that will be used for the certificate. A **Browse** button accompanies this field. When creating a new certificate, click the **Browse** button and select the appropriate image to use for the certificate from your local drive.
   E. If the certificate needs to have defined print margins, use the 'Top', 'Bottom', 'Left' and 'Right' fields to enter this information. This information is determined in pixels; therefore, list in pixels the desired width of each margin. This information is not required.

   Note: at this point, it is a good idea to click the **Save** button. This will cause the image you have browsed for and selected to upload; as well as save your other progress.

5. Select the **Design** tab:
   A. The data in the **Design** tab is the most complex part of certificate creation. When creating your certificate, it is important to remember that Custom Certificates can be assigned to multiple courses.
   B. When you first access the **Design** tab, your certificate image will not yet be displayed, this is intentional. However, there will be a 'Field Name' list available.
   C. *Fields* are similar to variables and the data for these fields is dynamic. You can add all fields to the certificate and you must add at least one. We will cover adding a field to the certificate shortly. First, more on the available certificate fields.

I. For example, if you add the 'Completion Date' field to the certificate: when a user completes a course with the certificate assigned, the 'Completion Date' field will become automatically populated with the completion date for that course registration.

II. If 'Course Location' is added to the certificate, that field will be populated with the session location information for whatever course the certificate is assigned to. Sometimes, depending on the course format, there will be no session location information to fill the 'Course Location' field. In these instances, the field will be left blank.

III. The 'Course Name' field will be populated with the name of the course to which the certificate is assigned (remember, certificate assignment takes place within the 'Course Edit Wizard'; and certificates can be assigned to multiple courses).

IV. The 'Credit' field will list any credits associated with the course to which the certificate is assigned. The 'Credit' field will display whatever credit is selected by the users upon registration. Certificates can only display one credit per certificate.

V. The 'Custom Text' field will pull data entered in the 'Course Edit Wizard'. Specifically, in the **Certificates** portion of the wizard, there is a 'Notes' field. This data is used to populate the 'Custom Text' field.

VI. The 'Provider Name' field will populate based on data from the 'Course Edit Wizard'. Specifically, in the **Description** portion, the 'Sponsor/Offerer' field.

VII. The 'Session Dates' field will populate with the date of the session for which the user is signed up. If the certificate is assigned to a course that has no sessions, this field will be left blank.

VIII. The 'User Name' field populates with the name of the user who has received the certificate.

D. To add a field to your certificate, click the **Add** button next to the appropriate field in the 'Field Name' list. Note that adding a field to the certificate, such as 'User Name', will only add a space for a user name, the phrase "User Name" will not appear on the certificate unless you have embedded it into your original certificate image.

I. If this is the first field you have added your certificate, your certificate should now be visible below the 'Field Name' list.

II. You will also see two new buttons: **Update Preview** and **Print Preview**.

a. You can click the **Print Preview** button at any time to create a PDF of your certificate as it currently is.

b. The **Update Preview** button will be used to update the 'Edit Certificate' interface after changes to fields have been made. We will cover this shortly.

III. By Default, the certificate displays with a grid super imposed upon it. This grid is to help create the certificate; it does not appear on the final certificate. It is possible to remove this grid using the ‘Show Grid Lines’ checkbox; but I recommend always leaving it visible.

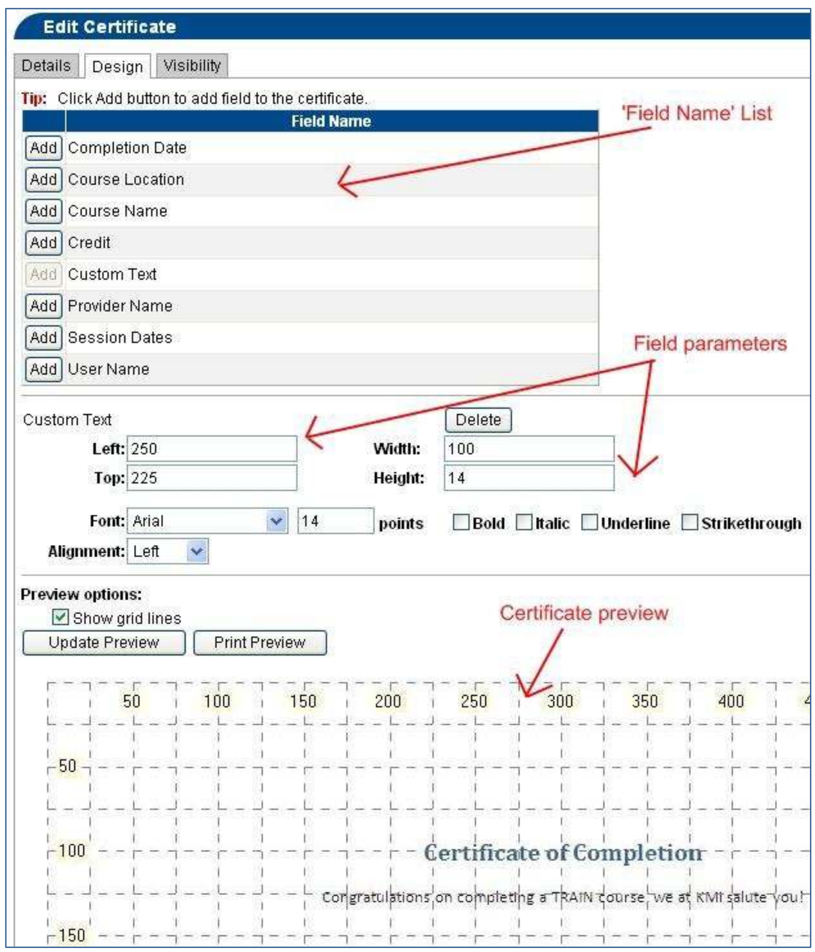
E. Once you have added a field to the certificate, that field then becomes inactive in the ‘Field Name’ list. However, the field is then presented below the ‘Field Name’ list, but above the certificate image (each field will have its own set of parameters). For example, see the image on the next page.

I. To remove a field after is has been added to the certificate, click the **Delete** button next to the field name in the field parameters.

II. Use the grid lines on the certificate preview to determine where on the certificate the fields should display. Think of these grid lines as coordinates.

III. Enter these grid coordinates into the ‘Left’ and ‘Top’ fields in the field parameters.

IV. The ‘Width’ and ‘Height’ fields are also based on the grid coordinates; but only as a measurement of the size of the field, not as an indication of the location of the field. In the example below, the ‘Custom Text’ field will be located 225 pixels from the top, and will be 14 pixels tall.



V. The remaining field parameters include some standard text formatting parameters. You can set the ‘Font’ and font ‘points’. You can also make the field ‘Bold’, ‘Italic’, ‘Underlined’ or ‘Strikethrough’ by selecting the appropriate field parameter checkboxes. The ‘Alignment’ parameter determines how the font will align within the field that has been created (this parameter is relative to the boundaries of the parameter field within the certificate, not the boundaries of the certificate itself).

F. Once you have added a field to the certificate or after you have changed any of the field parameter values, click the **Update Preview** button. This will refresh the page and display your adjustments. Note that this will not save the changes you have made, it simply displays them for you.

G. To save your progress, click the **Save** or **Save and Back** button. It is a good idea to save the certificate after each new parameter has been added and adjusted.

H. Once all appropriate fields have been added to the certificate, click the **Save and Back** button to save your work and return to the previous interface

I. Note that you can make additions and changes to the certificate even after users have received the certificate. These changes are reflected the next time the user access the certificate.

Editing an Existing Custom Certificate

Once a certificate has been created, even if users have already received the certificate, administrators can edit the certificate content and even replace the image. Changes like these will be affective the next time a user access the certificate from the ‘Certificates’ interface (accessed via the ‘Home’ page); even if that user has received the certificate before the changes were made.

TO EDIT AN EXISTING CUSTOM CERTIFICATE:

1. Access the ‘Certificates’ interface as described above.
2. Click the **Edit** icon () in row with the certificate you with to edit.
3. Make any needed changes to the **Details**, **Visibility** and **Design** tabs.

   A. If you have created a certificate earlier, but left it inactive until the certificate is complete, check the ‘Active’ box now to make the certificate available for course assignment.
4. Click the **Save and Back** button to return to the previous interface. Click **Save** at any point to save your progress without returning to the previous interface. Click **Cancel** to return to the previous interface without saving your changes.

Deleting an Existing Custom Certificate

It is not actually possible to delete a certificate. However, you can adjust the ‘Active’ status of the certificate or limit the visibility. Note that changing the ‘Active’ status or visibility of a certificate might affect access to the certificate for users who have already received one.

To Delete an Existing Custom Certificate:

1. Access the ‘Certificates’ interface as described above.
2. Click the **Edit** icon ( ) in row with the certificate you with to edit.
3. Select the **Details** tab.
4. Uncheck the ‘Active’ checkbox.
5. Click the **Save and Back** button to return to the previous interface. Click **Save** at any point to save your progress without returning to the previous interface. Click **Cancel** to return to the previous interface without saving your changes.

Assigning a Custom Certificate to a Course

Course providers will frequently wish to provide a printable certificate for their course, conference, or conference session. Through the certificate assignment interface, the course provider may:

- Assign a certificate to a course, conference, or conference session
- Assign separate certificates for different credit types within the same course, conference, or conference session
- Assign separate certificates depending on the user’s completion date within the same course, conference, or conference session
- Update assignment settings for an existing certificate assignment
- Remove a certificate assignment

ACCESSING THE CERTIFICATE ASSIGNMENT INTERFACE FOR A COURSE

To access the certificate assignment interface for a course, first find the course in any course search, or through the Administration -> Courses -> Course List interface. From there, click the pencil icon to enter the Course Edit Wizard. Within the Course Edit Wizard, click the Certificates option in the menu at the left.

ACCESSING THE CERTIFICATE ASSIGNMENT INTERFACE FOR A CONFERENCE

To access the certificate assignment interface for a course, first find the conference through the Administration -> Courses -> Conferences interface. From there, click the pencil icon to enter the Conference Edit Wizard. Within the Course Edit Wizard, click the Conference Certificates option in the menu at the left.

ACCESSING THE CERTIFICATE ASSIGNMENT INTERFACE FOR A CONFERENCE SESSION

To access the certificate assignment interface for a conference session, first locate the conference through the Administration -> Courses -> Conferences interface. From there, click the clock icon to go directly to the Sessions for that conference, or click the pencil icon to enter the Conference Edit Wizard, then click the Sessions header under the Session Information option in the left-hand menu. In the sessions section of the Conference Edit Wizard, find the desired session, and click the pencil icon to edit the session. Click the Certificates tab at the top of the interface to access the certificate assignment interface.

USING THE INTERFACE

Once you have entered the Certificate interface, you are ready to assign certificates, update existing assignments, or remove unwanted assignments.

ASSIGNING A CERTIFICATE

To assign a certificate, click the Assign Certificate button to bring up the Certificate Details box. In this box, you may select one of the following Filters to determine what certificates are available for assignment:

- My certificates – This option will show only certificates created specifically by your account.
- All public certificates – This option will show all certificates which are marked as “public” by the party responsible for creating or maintaining the certificate.
- All Public and everyone’s private certificates – This option will show all certificates. Note that private certificates are often intentionally designed with specific regions or courses in mind. Before using someone else’s private certificate, it is advisable to consult with that person to confirm whether it would be appropriate for the content of your course, conference, or conference session.

Below the Filter option is the Certification Type drop down box. The specific options displayed in this box will vary, depending on the filter selected above. Simply click on the name of the desired certificate type to select it for this assignment.

Below the filter option are the Start and End Date boxes. These values are optional, and allow for distinct assignments depending on the user’s completion date.

- **Start Date**: If a date is entered here, a user will only receive the certificate if they complete the course/conference/conference session ***on or after*** the specified Start Date. Users who complete it before that date will not receive the certificate defined in this assignment. If no value is entered here, only the End Date is enforced, if present.
- **End Date:** If a date is entered here, a user will only receive the certificate if they complete the course/conference/conference session ***before*** the specified start date. This cutoff is enforced as the first moment of the defined date (The instant immediately after midnight of the preceding night, Eastern Time). Any completions which occur on or after the end date will not receive the certificate. If no value is entered here, only the start date is enforced, if present.
- **If no dates are specified at all**: If both the Start and End date boxes are left empty, the user’s completion date will not affect whether or not they receive this certificate.

Below the Start and End Date boxes is the Available to the following Credit Types selection box. You must select a value here. Each certificate assignment will only apply to one credit type for that course. **If you wish a certificate to be available to all credit types, you must create a separate assignment for each credit type.**

Below the Credit Types box is the Notes section. This is an optional space in which you may enter any brief notes pertaining to the certificate assignment you deem appropriate. These notes will be visible only to other administrators who have the ability to view and edit certificate assignments for this course/conference/conference session.

Lastly, the Users should receive this certificate option allows you to define whether the certificate should only become available if the Course Provider verifies the user's completion, or if it should be available as soon as the user completes the course/conference/conference session. **Important note**: Selecting "Manual Delivery" has a direct impact on how registrations become verified for the course. Verification is also dependent upon other factors. Other settings within a course/conference/conference session may interfere with the Manual Delivery option.

Once you have made the appropriate selections for the above options, click Save to assign the certificate to the course.

Policies

I. General Policies and Liability Terms

1. www.Train.org is owned and operated by the Public Health Foundation (PHF) with assistance from the TrainingFinder Real-time Affiliate Integrated Network (TRAIN) Affiliates. PHF and the TRAIN Affiliates receive no commissions nor any other financial compensation related to user enrollment in a course or purchase through this system, unless a course is specifically noted as being offered by PHF or an Affiliate organization for a fee.
2. All registrations, purchases, obligations, and course communications are the responsibilities of users and providers. Neither PHF nor Affiliates will arbitrate disputes.
3. Because www.Train.org and TRAIN Affiliates rely on submission of data by the participating users, PHF and Affiliates are not responsible for errors, omissions, or timeliness in any data submitted, including courses, documents, announcements, and other materials submitted on the www.Train.org and TRAIN sites by any person. PHF is not responsible for erroneous, defamatory, or illegal information submitted to www.Train.org and TRAIN, nor for any damages that may be suffered as a consequence of these posting.
4. Unless noted otherwise, neither PHF, its agents, nor TRAIN funding partners, sponsors, or Affiliates are responsible for course content or the accuracy of listing information, which is entirely the responsibility of course providers.
5. PHF is the owner of all data entered and managed through the national www.Train.org. TRAIN Affiliates have access to review course data on www.Train.org for assessment and planning purposes, but have no authority to sell or otherwise transfer any information from the national www.Train.org or any data from another Affiliate to any person(s) without the prior written consent of PHF.
6. Data from www.Train.org or any TRAIN Affiliate site may not be sold. This prohibition covers all course listings, providers, learners, and any other site data.
7. PHF reserves the rights, which may be exercised in PHF's sole discretion, to (a) edit Affiliate-approved course listings for clarity and overall consistency within www.Train.org and TRAIN submission requirements; (b) refuse or revoke any organization's privilege to list any course if it is inconsistent with the purpose, scope, and target audiences of www.Train.org and TRAIN, or for any other reason; or (c) delete duplicate or inappropriate records.
8. PHF will not use Affiliate learner record data or Affiliate-approved course provider data for PHF communications or marketing unless written permission is given or individuals request to receive information about new courses or other site news through the "Save this Search" and other notification features on www.Train.org or TRAIN sites.

9. The goods and services provided within www.Train.org and TRAIN network are provided without any express or implied warranties of (a) merchantability, or (b) fitness for a particular purpose. PHF shall not be liable to any Affiliate or third party for any loss of profits, loss of use, interruption of business, or any direct, indirect, incidental or consequential damages of any kind arising under or in connection with www.Train.org or TRAIN.
10. Access delays, errors or unavailability of the site may occur due to modification or maintenance of www.Train.org and TRAIN sites or for other reasons which may be beyond PHF's control. PHF is not liable to Affiliates, course providers, or users for any such delays, inconvenience or unavailability of site(s), regardless of cause.
11. Links to and from www.Train.org and TRAIN Affiliates do not constitute an endorsement by PHF or Affiliates of the parties or their products and services. PHF and Affiliates are not responsible for the accuracy or content of information contained in the links to third party sites. The confidentiality statements of PHF and Affiliates do not extend to any third party sites.
12. PHF and Affiliates may compile and publish commentaries and reviews regarding any of the courses, features and materials listed on TRAIN or www.Train.org.

II. Confidentiality Statement

1. TRAIN Affiliates have access to all learner records, including transcripts, entered and managed through their Affiliate site and have the right to delete or edit all such learner records. Affiliates may use individual or aggregate data from learner records for any public health purpose, including but not limited to workforce assessments, performance management, federal grant reporting, and communications related to public health preparedness training and emergency responses requiring trained personnel. Affiliates may further restrict the use of learner record data in accordance with the policies and laws governing the Affiliate site and organization.
2. Affiliates may assign rights to access learner records to local public health agencies or other entities responsible for public health workforce training, and the Affiliate shall assure that the agency or entity abides by the privacy and confidentiality commitments contained herein. Affiliates may grant access rights to learner records to vendors performing evaluation or other duties on the Affiliate's behalf, so long as such vendors agree to the confidentiality terms set forth by PHF.
3. PHF will not alter or delete learner records from an Affiliate site except to transfer a record to another Affiliate, make necessary repairs, or as otherwise requested by the learner or Affiliate that has rights to the record.
4. When a learner chooses to register for a course through www.Train.org or TRAIN, the course provider may access required and optional contact information contained in the learner record for

communications related to the course. Course providers have no access to transcript information in the learner record.

5. PHF and its vendors have access to all learner records in TRAIN. PHF and any vendors used by PHF, Affiliates, or their designees agree that learner records containing transcripts and individually identifying data will not be disclosed to any third party, except upon the written authorization of the learner, or upon the order of a court of competent jurisdiction.
6. After excluding any individually identifying data, PHF and Affiliates may compile and aggregate data from Affiliate learner records for analysis, assessments, and planning purposes to a third party.

III. Learner Rights and Responsibilities

1. Your Affiliate site's administrator(s), PHF and its vendors or designees that agree to www.Train.org and TRAIN confidentiality policies may access learner records, including transcripts.
2. Identifiable information in your learner record will not be disclosed to any third party, except:
    a. With your written authorization.
    b. Upon the order of a court of competent jurisdiction.
    c. If you choose to register for a course through www.Train.org or TRAIN. Registration enables the course provider to access the contact information that you provide for communications related to the provider's course. Course providers have no access to transcript information in the learner record.
3. It is your responsibility to keep your learner record up to date.
4. Should you desire your record to be transferred to another Affiliate or to a third party, contact your site administrator for more information on this process. In most cases, changing your address will automatically transfer your record to the appropriate TRAIN Affiliate site, if available. As new states and organizations join TRAIN, PHF will transfer the management of records as appropriate to the Affiliate's jurisdiction. If needed, PHF will transfer your learner records to another Affiliate or to a third party with your written permission.
5. Your individual learner data will not be used by PHF for marketing any products or services without your prior written consent. Affiliates may use your contact information to reach you in the event of an emergency or to alert you to important public health information and training. If no Affiliate exists in your public health jurisdiction, and your record is on the national TRAIN, PHF may use your contact information for the same purposes.
6. PHF will exclude any individually identifying data before compiling or publishing data about the health workforce that draws from your learner record. Individually identifying data includes your

first name, middle name, last name, street address, email, telephone, mobile, fax, pager, or equivalent fields.

7. All fees and expenses for any course are to be handled between you and the course provider. PHF and Affiliates are not responsible for registration or fees and expenses related to any third-party course. Neither PHF nor Affiliates will arbitrate disputes.
8. Neither PHF nor any of its funding partners, Affiliates, or sponsors are responsible for the endorsement of courses, nor for course content, which is entirely the responsibility of the course providers. We encourage you to carefully review all course descriptions and contact the course provider or developer in making your own decisions about the quality and suitability of courses for your learning needs.
9. www.Train.org and TRAIN may offer links to other websites. The confidentiality commitment of PHF for its site does not extend to any third party sites. We encourage you to review the policies of all third party sites that may be linked from TrainingFinder.org and TRAIN.
10. Affiliates may further restrict the use of learner record data in accordance with the policies and laws governing the Affiliate site and organization.

Terms of Use:
PHF reserves the right to change, at any time, these terms and conditions, and the information contained herein.

If you feel that PHF or an Affiliate has violated this Confidentiality Statement in any way, please contact PHF at info@phf.org o we may address the issue.

By registering as a user on any www.Train.org or TRAIN Affiliate site, you acknowledge that you have read, understood, and accepted PHF's General Policies and Liability Terms, Confidentiality Statement, and Learner Rights and Responsibilities.

IV. Course Provider Rights and Responsibilities

1. Course Providers are responsible for entering their course information into the www.Train.org database and keeping this information up to date.
2. As a Course Provider, you agree to allow the Public Health Foundation (PHF) and TrainingFinder Real-time Affiliate Integrated Network (TRAIN) Affiliates use of your course titles and organizational name for publicity of the www.Train.org or TRAIN Affiliate sites.
3. All courses entered by approved organizations will be placed in a temporary holding bin until approved for listing by the site administrator(s). Course Providers will be notified by email upon approval or denial of a course. Furthermore, courses will automatically become de-activated

once the entered de-activation date arrives. As a Course Provider, you may modify the date prior to de-activation.

4. PHF and Affiliate administrators reserve the right to edit your course listings, subject areas, target audiences, or other attributes for clarity and overall consistency with www.Train.org submission requirements. TRAIN Affiliates also reserve the right to block any course from view on their individual site, even if the course was approved by another TRAIN Affiliate.
5. PHF reserves the right to refuse or revoke any organization's privilege to submit courses to www.Train.org that are inconsistent with the purpose, scope, and target audiences of TrainingFinder.org, or for any reason.
6. Course Providers should list their courses on TRAIN through only one TRAIN site. Each Course Provider must choose to use either the national TrainingFinder.org site or one of the TRAIN Affiliate sites based on the guidance below. The site selected does not affect the visibility of courses to users throughout TRAIN. It affects the site administrator that manages your registration and course listings.
    a. Course Providers Primarily Serving a TRAIN Affiliate Jurisdiction
        - Course providers that primarily serve an Affiliate's jurisdiction should register to list their courses through the respective TRAIN Affiliate site.
        - "Primarily serving the Affiliate's jurisdiction" means that most of the provider's public health courses are designed for and restricted to the workforce of the jurisdiction covered by the Affiliate.
        - Course providers that also offer courses designed for a national or regional audience can be entered and approved through the same Affiliate site, so long as these courses comprise a minority of course offerings. Once approved, nationally available courses will be visible to all learners on TrainingFinder.org.
    b. Course Providers Primarily Serving a National, International, or Regional Audience:
        - Course providers that primarily serve a national, international (including the United States), or regional audience comprised of two or more states should register to list their courses through the national TrainingFinder.org site.
        - Regional course providers must designate on the course listing each state or jurisdiction that is eligible to participate. Once the course is approved for listing by PHF, the regional course information will be visible to learners from the corresponding jurisdictions.
        - National and international course providers should enter their course information through the national TrainingFinder site. Once approved, nationally available courses will be visible to all learners on TrainingFinder.org.
    c. Course Providers Serving Non-Affiliate Jurisdictions:

- Courses that are designed for and restricted to the workforce of Non-Affiliate jurisdictions are not eligible to be listed on www.Train.org.
- Course providers that primarily serve non-Affiliate jurisdictions may register to list courses on www.Train.org that serve a national, international, or regional audience and meet other submission requirements.

Terms of Use:
PHF reserves the right to change, at any time, these terms and conditions, and the information contained herein.

If you feel that PHF or an Affiliate has violated this Confidentiality Statement in any way, please contact PHF at training@phf.org so we may address the issue.

By registering as a course provider at any TRAIN Affiliate site or www.Train.org, you acknowledge that you have read, understood, and accepted PHF's General Policies and Liability Terms, Confidentiality Statement, Learner Rights and Responsibilities, and Course Provider Rights and Responsibilities.

V. Definitions for Policies

Administrator. Any designated person that manages and approves course providers, learners, courses, or other items on TrainingFinder.org or a TRAIN site.

Affiliate. Any organization - such as a state public health agency, regional training center, or professional association - that purchases and is responsible for managing a customized website that is part of the TrainingFinder Real-time Affiliate Integrated Network (TRAIN).

Affiliate jurisdiction. The state, locality, or other geographic area or constituency served by an Affiliate as established by statute, bylaws, or other authority.

Course provider. Any public or private organization that delivers training and registers to submit their organization's training programs on national or Affiliate TRAIN site. The course provider and its courses are subject to administrator approval.

Individually identifying data. Includes the following required and optional fields in the learner records: first name, middle name, last name, street address, email, telephone, mobile, fax, pager, or equivalent fields.

Learner. Any public health or health professional that uses national or Affiliate TRAIN sites to find, register for, or track his or her participation in training opportunities.

Learner record. An individual's electronic record within TRAIN containing entered contact information, other individual attributes, and a transcript of his or her participation in training programs either automatically tracked by the system or entered by the learner.

Non-Affiliate. Any state or other organization that has not purchased a customized website that is part of the TrainingFinder Real-time Affiliate Integrated Network (TRAIN).

Site. A term used to describe the national TrainingFinder.org and TRAIN website(s).

Site administrator. *See term Administrator.*

TRAIN. The TrainingFinder Real-time Affiliate Integrated Network is a web based nationwide learning management system for public health organizations that are affiliated with TrainingFinder.org.

TrainingFinder.org. The Public Health Foundation's (PHF) online learning clearinghouse where the public health workforce can search the extensive database of nationwide and international courses, submit courses, and track learning.

User. Any Affiliate, Learner, Course Provider, or other person that views, enters, or manages information on www.Train.org and TRAIN sites.

Partners and Sponsors

Funding Partners

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Arkansas Department of Health (Founding Partner)
www.healthyarkansas.com

Centers for Disease Control and Prevention
www.cdc.gov

Health Resources and Services Administration
www.hrsa.gov

Public Health Foundation
www.phf.org

Participating TRAIN affiliates

The Robert Wood Johnson Foundation
www.rwjf.org

Colorado Department of Health
www.colorado.gov/cdphe

Sponsors of TRAIN

American College of Preventive Medicine

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Association of Public Health Laboratories

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Association of State and Territorial Health Officials

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Centers for Disease Control and Prevention

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Health Resources and Services Administration

National Association of County and City

Health Officials

National Association of Local Boards of Health

National Association for Public Health Statistics and Information Systems

National Public Health Leadership Development Network

National Library of Medicine

National Network of Libraries of Medicine

Office of Disease Prevention and Health Promotion

Office of Minority Health

Partnership for Prevention

Public Health Leadership Society

Public Health Training Network

Society for Public Health Education

Technology Partner

TRAIN website design and hosting provided by

Knowledge Management Interactive (KMi), Inc.
www.kmionline.com

Contact Information

For questions or more information about listing courses on a TRAIN affiliate site, please visit www.train.org for links to affiliate sites and contact information.

Contacting PHF for Support

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Washington, DC 20005

Telephone: 202-218-4400

Fax: 202-218-4409

Email: training@phf.org

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