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About This Guide

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 material for the 3.7 release of the handbook is located on pages:

- 87 – Clarification on the active status of conferences.
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. In the future, TRAIN will serve the majority of the U.S. public health workforce.

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 e-mails 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 Become a Provider under Become a Course Provider and follow the instructions to create an account. You will receive a notice of approval/disapproval via e-mail, 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.

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

* 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 under My Learning Record on the right-hand side of the screen.
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:

   Note: You cannot register for national status through an affiliate site
2. Click the My Account Link under My Learning Record on the right side of the screen.
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 create a certificate, go to the **Certificates** portion of the **Course Edit Wizard** 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 your have created to display.
        ii. **Show All Public Certificates** – this will display all public certificates created both by you and other TRAIN certificate administrators.
        iii. **Show All Public and Everyone’s Private Certificates** – this will display all certificates created by all certificate managers.
     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. The certificate you select from this drop-down menu will remain displayed in the drop-down menu even if the radio button options above are changed. The certificate displayed in the drop-down is the certificate users who complete the course will receive.
     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.
   i. 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.

• 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. Advanced
     b. Knowledgeable
     c. Aware
  2. Select Yes or No if Competencies are applicable for this course.
     a. Click Next or Save & Finish Later.
     b. If competencies are applicable, select your competencies.
     c. 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 Prerequisites

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 Contact
1. 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 Review Notification settings
1. To enter a Review Notification:
   a. Click New Email.
   b. Enter email address to where review notifications are to be sent.
   c. Click Add.
   d. Click Next or Save & Finish Later.

- 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.
2. If the course has Custom Attributes, such as MRC competencies which are applicable, 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. Click Next or Save & Finish Later.

- 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’ portion 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.

• Approving 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 Waiting** link on your Home page. You may 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.

3. Select either **Approve** or **Decline** next to the user’s name. The user will be automatically informed by e-mail.

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
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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.

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.
   b. 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.

7. 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.

8. 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.
9. 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.

10. 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.

11. To delete a section or a course highlight the name of the section or course and click the blue ‘x’ icon.

12. To move a section or course up or down in the listing, highlight the name and click the up/down arrow icons.

13. 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.

14. 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.

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.

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 e-mail**: 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**
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**.

Instructors Add/Edit
Adding Session

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.

Directions for each of the options are on the following pages.

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 (x) 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 regard 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.
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. Or,
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 simply provides you with the number of seats already claimed by users through the registration process.

15. Enter 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.

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. Or,
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.
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. Or,
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.
14. Seats Allocated simply provides you with the number of seats already claimed by users through the registration process.
15. 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.

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.
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 simply provides you with the number of seats already claimed by users through the registration process.
13. 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.

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.
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. You may filter the list by selecting Location Types or typing a location name before clicking Show Locations.

<table>
<thead>
<tr>
<th>Session Schedules:</th>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update below</td>
<td>04/16/2005</td>
<td>6:45 AM</td>
<td>10:15 AM</td>
<td></td>
</tr>
</tbody>
</table>

| Update Schedule: | Date: 04/16/2005 | Start Time: 6:45 AM | End Time: 10:15 AM |

<table>
<thead>
<tr>
<th>Locations:</th>
<th>Select Location Types:</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All Types</td>
<td>Auditorium</td>
<td>Classroom</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Handicapped Accessible</td>
<td>Internet</td>
<td>Lab - Computer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lab - Science</td>
<td>Meeting Room</td>
<td>Satellite Downlink</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 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.

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 sessions 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, simply click **Add New Schedule** and fill out the required fields.
9. After making all changes click **Save** to finalize.

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.

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

**Course Roster Functions**

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

Both verifications and active statuses can now be controlled using the checkbox columns on the course roster. To verify a registration, simply 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).

**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.

**E-mailing 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, simply 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. Simply 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, simply click the checkbox in the Withdrawn column and click Save. When a seat becomes available (through the withdrawal of a user on the active Course Roster) all users on the Waitlist will receive email notification regarding the open seat. Registration for the open seat is on a first-come first-served basis: all Waitlisted users have the ability to claim the open seat.

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 waitlist which users you would like to email and click the Send Email to Selected Users button.
This Utility module allows you to conveniently send an e-mail 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 Event 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, simply click a numeral link at the bottom of the page. To view all users on one page, simply 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 Learner Attendance

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, simply:

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.
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, simply 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.

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](image)

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. If you are entering Verified registrations, check the **Verified** box on the user record to create the registration as Completed and Verified. The course will be added to user's transcript if Verified is checked, to the user's My Learning if Verified is not checked. To Verify all registrations, click the Verified checkbox.
   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

Creating Course Assessments

Any course entered can be set up to test learners on their initial knowledge of a subject as well as a post-course assessment to test learners on their comprehension of course material. This section deals with creating assessment tests from a pool of questions available in TRAIN. To read more on creating or adding to the pool of available questions, please see the following section on Managing Assessments.

1. Click Administration on the Navigation Tab Bar.
2. Click Courses on the left side menu (if you have multiple administrative roles).
3. Click Course List on the left side menu and find the course you wish to edit.
4. Once you have located your course, click the Assessments icon, which looks like a checkbox with an active check.
5. On the following screen you will be presented with the National Visibility Tree. You can add an assessment for your course to any group or subgroups.
6. Click the group you wish to add your assessment to.
7. To add a pre or post assessment (you may also add a “practice” post test), click the Add button for the correct option. The method of adding a pre and post assessment is identical, so we will only go through adding a pre-assessment in this document.

8. You must first decide what Credit Type your assessment will apply to: you may create a different assessment for each type of credit that is offered by your course. If you want to set up one assessment for all credit types, select None for the type.

9. On the following screen you will be presented with three tabs; Common, Introductory Text, and Final Page Text.

10. **Common:** The only required fields are name and minimum passing score. The score is not a percentage, but rather a point-value. You will define the total point value as you add questions. Enter the total points needed to pass in the **Score** field. You can always come back to edit the score after adding your questions.

   a. **Question Delivery Type:** Using this drop-down you can set your assessment to either be a defined sequence – the same for every user – or you can select Random Order – the same questions for every user, but not the
same order – or you can select M Random Questions out of N selected – for example, every user will see a total of 10 different questions out of the 20 assigned to the assessment.

b. **Number of Questions:** Use this form to set the number of questions a user will be required to take out of the total questions assigned to the assessment. Leave blank to require all questions be taken. This option is only available when Delivery Type M out of N questions is selected.

c. **Active:** Check to make the assessment “live” and begin testing your users. Un-check to remove the assessment from use.

d. **Start Date/End Date:** If you wish to define a set date-range for which you would like your assessment to be accessible, enter those dates here.

   **Note:** If a user completes a course or is verified for a course before the assessment start date, that user will **not** have access to the assessment.

e. **Start Time/End Time:** You can add a Start Time and End Time to your Start/End Dates to further customize your Assessment delivery.

   **Note:** If a user completes a course or is verified for a course before the assessment start time, that user will **not** have access to the assessment.

f. **Time Limit:** If you wish to limit the amount of time a user can take to complete the Assessment, enter that time here. The time must be entered in minutes.

g. **Attempts Allowed:** You can limit the number of attempts a user has to complete a course. This allows you to build in a certain amount of leniency if you wish to take into consideration possible problems such as connectivity issues, weather, etc.

h. **Assessment Window Properties:** Using the given options, you can define the status of the pop-up window containing the assessment. If you wish to remove items from the browser window such as Menu Bar, Scroll Bar, or Tool bar, simply un-check the respective checkboxes. You can also define the height and width of the window, as the distance from both the top of the screen and the left of the screen.

11. **Introductory Text:** You may enter any text you wish the user to read before taking the assessment in this tab.

12. **Final Page Text:** You may enter any text you wish the user to read after completing the assessment in this tab.

13. Once you have filled in all required and optional information, click **Save**.

14. To edit the properties of your assessment, simply return to the course’s Assessment page, and click the pencil next to either the pre or post-assessment name.

**Adding Questions:**

1. The next step in creating your assessment is to add questions to your assessment.
2. Click **Add Questions** to continue.
3. You will see the minimum score required to pass at the top of the screen – to edit this, return to the course assessment page and click the pencil icon next to the assessment name.
4. To add a new question, click **Add**.
5. You will be presented with a question bank of all available Assessment questions in TRAIN. You can filter the list based on Question Category and Question Types.
6. To add questions to your assessment, check the questions you wish to add and enter a score – this score will be applied to all selected questions.
   a. To have different scores to questions of the same category and type, repeat the **Add** process and enter different **Score** integers each time.
   You can also edit any score from the Assessment Question List page.
7. Once you have selected your questions, click **Save**. You will be directed back to the Assessment Question List page, displaying all of your Assessment's questions.
8. To add additional questions, click **Add** and repeat the previous steps.
9. To edit any question's point value, click the pencil icon next to the Order No. column.
10. To edit the order number of your questions, use the arrow images to the right of the column.
11. To remove a question, you may either deactivate it by editing the question and un-checking the active box, or you may completely delete the question by clicking the blue “x”.

**Note:** If you have not created any questions or need to add a new question for this point, you can always click “Add New Question” at the bottom of the “Choose Questions” screen. This will direct you to the “Create Question” screen and then direct you back to the “Choose Question” screen for your assessment once you have finished.
Creating Course Evaluations

Any course entered can be set up to receive feedback from the learner regarding the course they just completed. This section deals with creating a course evaluation from a pool of questions available in TRAIN. To read more on creating or adding to the pool of available questions, please see the following section Managing Evaluations. The process of setting up Course Evaluations is nearly identical to the process of setting up Course Assessments.

1. Click Administration.
2. Click Courses on the left side menu (if you have multiple administrative roles).
3. Click Course List on the left side menu and find the course you wish to edit.
4. Locate your course and click the Evaluations icon, which looks like a small bar graph.

5. On the following screen you will be presented with the National Visibility Tree. You can add an evaluation for your course to any group or subgroups.
6. Click the group you wish to add your evaluation to.
7. To then add an evaluation, click the Add Evaluation button located beneath the Course Evaluations header.
8. You must first decide what Credit Type your evaluation will apply to: you may create a different evaluation for each type of credit that is offered by your course. If you want to set up one evaluation for all credit types, select None for the type.

9. On the following screen you will be presented with three tabs; Common, Introductory Text, and Final Page Text.

10. **Common**: The only required field is the Evaluation Name.
    a. **Start Date/End Date**: If you wish to define a set date-range for which you would like your evaluation to be accessible, enter those dates here.
       Note: If a user completes a course or is verified for a course before the evaluation start date, that user will not have access to the evaluation.
    b. **Start Time/End Time**: You can add a Start Time and End Time to your Start/End Dates to further customize your evaluation delivery.
       Note: If a user completes a course or is verified for a course before the evaluation start time, that user will not have access to the evaluation.
    c. **Mandatory**: By checking this box, users will not be able to complete the course without submitting the evaluation. If you would like to allow users to skip the evaluation, uncheck this box.
    d. **Anonymous Results**: By checking this box the Evaluation Results submitted by users will be anonymous, and not tied to their user account.
    e. **Active**: Check to make the evaluation “live” and begin testing your users. Un-check to remove the evaluation from use. You must save the evaluation and add questions prior to making it active.
    f. **Evaluation Window Properties**: Using the given options, you can define the status of the pop-up window containing the evaluation. If you wish to remove
items from the browser window such as Menu Bar, Scroll Bar, or Tool bar, simply un-check the respective checkboxes. You can also define the height and width of the window, as the distance from both the top of the screen and the left of the screen.

11. **Introductory Text:** You may enter any text you wish the user to read before taking the evaluation in this tab.

12. **Final Page Text:** You may enter any text you wish the user to read after completing the evaluation in this tab.

13. Once you have filled in all required and optional information, click **Save**.

14. To edit these properties, return to the course’s Evaluation page, and click the pencil icon.

**Adding Questions:**

1. The next step in creating your evaluation is to add questions to your evaluation.
2. Once you click **Save** after initially creating your evaluation you will be directed to add questions: simply click **Add Questions** to continue.
3. You will be presented with a question bank of all available evaluation questions in TRAIN. You can filter the list based on Question Category and Question Types.

4. To add questions to your evaluation, check the questions you wish to add
5. Once you have selected your questions, click **Save**. You will be directed back to the evaluation Question List page, displaying all of your evaluation’s questions.
6. To add additional questions, click **Add Question** and repeat the previous steps.
7. To edit the order number of your questions, use the arrow images to the right of the column.
8. To remove a question, you may either deactivate it by editing the question and un-checking the active box, or you may delete the question by clicking the blue “x”.

**Managing Assessments**

Assessments are built using questions from an existing pool or question bank within TRAIN. You can build your assessment from existing public questions or build your own categories and questions to use in your assessments.
Assessment Question Bank

1. Assessments serve to test and verify the knowledge users have gained from taking courses available on TRAIN. Assessments allow users to prove their mastery of course content. Along these lines, multiple assessments can be set up to account for multiple credit types.

2. In order to organize questions, you must first create Assessment Categories. Once you have established Category Types for questions, you may then build questions that are associated with the Category Type.

Creating and Editing Assessment Categories

1. Click Administration.

2. Click Courses and then click Assessment Questions.

3. You will see a list of all entered Assessment Categories. To add a new Category, click Add.

4. You will then need to give your category a name, choose if you will allow it to be Public or not, and be sure your category is Active.
   a. Any Public category will be available to other TRAIN users.

5. Click Save to save your category and return to the Question Category list.

6. To edit an existing Category, simply click the pencil icon next to the Category name.

Creating New Questions

1. To add questions to an Assessment Category, navigate to the Assessment Question Bank page.

2. To add a new question, click the name of the appropriate category.

3. To add a new question click Add.

4. You must first decide what type of question your new entry will be. Then click Next.

5. Once you have selected the question type, you will be presented with two tabs. The first tab, Common, requires you to place the question into a category, add the text of the question, and set the question status to Active. You may also upload an image on the Common tab that will be displayed as part of the Assessment Question.

<table>
<thead>
<tr>
<th>Question Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose a type of the question:</td>
</tr>
<tr>
<td>○ Multiple choice</td>
</tr>
<tr>
<td>○ True/false</td>
</tr>
<tr>
<td>○ Fill-in blank</td>
</tr>
<tr>
<td>○ Matching</td>
</tr>
<tr>
<td>○ Multiple fill-ins</td>
</tr>
</tbody>
</table>

   Next > Cancel
6. The second tab you will see is dependent upon the type of question you are building. For example, if you are building a Multiple Choice question, you will build the selections using the standard editing functions used throughout the site, marking one question as correct.
As a second example, if you select a Rating question type, you will see a Rating Settings tab where you will set point values. You will not always be presented with the second tab: for example, if you are building a true or false question, you will simply mark the question as being “true” or “false” on the Common tab. You may also upload images to individual question choices if necessary.

Editing Existing Assessment Questions
1. Click Administration.
2. Click Courses and then click Assessment Question Bank.
3. Click the Name of a Question Category to bring up the current list of questions.
4. Once you find the question you wish to edit, click on the pencil icon next to its name.
5. Make any changes necessary and then click Save to finalize your edits.

Note: You will be warned if the question is assigned to an Assessment(s). If you continue to edit a question that is “in use” it will change the Assessment that it is assigned to.

Managing Evaluations
Evaluations are built using questions from an existing pool or question bank within TRAIN. You can build your evaluation from existing public questions or build your own categories and questions to use in your evaluation.

Evaluation Question Bank
1. Evaluations are used to gather feedback from your users regarding the courses they take through TRAIN. An evaluation may be added to any course you list. Multiple Evaluations can also be added to one course based on various Credit Types.
2. In order to organize questions, you must first create Categories. Once you have established Category Types for questions, you may then build questions that are associated with the Category Type.

Creating and Editing Evaluation Categories
1. Click Administration.
2. Click Courses and then click Evaluation Question Bank.
3. You will see a list of all entered Evaluation Categories. To add a new Category, click Add.
4. You will then need to give your category a name, choose if you will allow it to be Public or not, and be sure your category is Active.
   a. Any Public category will be available to other TRAIN users.
5. Click Save to save your category and return to the Question Category list.
6. To edit an existing Category, click the pencil icon next to the Category name.

Creating New Questions
1. To add questions to an Evaluation Category, navigate to the Evaluation Question Bank page.
2. Click the Name of a Question Category to bring up the current list of questions.
3. Click Add.
4. Decide what type of question your new entry will be. Select the question type, and then click Next.
5. Once you have selected the question type, you will be presented with two tabs. The first tab, Common, requires you to place the question into a category, add the text of the question, and set the question status to Active. You may also upload an image on the Common tab that will be displayed as part of the Evaluation Question.
6. The second tab you will see is dependent upon the type of question you are building. For example, if you are building a Multiple Choice question, you will build the selections using the standard editing functions used throughout the site, marking one question as correct. As a second example, if you select a Rating question type, you will see a Rating Settings tab where you will set point values. You will not always be presented with the second tab: for example, if you are building a true or false question, you will simply mark the question as being “true” or “false” on the Common tab. You may also upload images to individual question choices if necessary.
Editing Existing Evaluation Questions
1. Click **Administration**.
2. Click **Courses** and then click **Evaluation Question Bank**.
3. Click the Name of a Question Category to bring up the current list of questions.
4. Once you find the question you wish to edit, click on the pencil icon next to its name.
5. Make any changes necessary and then click **Save** to finalize your edits.

**Note:** You will be warned if the question is assigned to an evaluation(s). If you continue to edit a question that is “in use” it will change the evaluation that it is assigned to.

Users and Assessments
1. **Pre-Assessments:** Assessments are always mandatory. Therefore when a user registers for a class, they must complete any Pre-Assessment before they are considered fully registered and **In Progress**.
2. There are a number of locations where the user will be instructed to complete the Pre-Assessment:
   a. On the course **Registration** tab.
   b. In the user’s **My Learning**.
   c. On the home page, above the **My Learning Record**.
3. In order to launch the Pre-Assessment, the user must click the **Assessment** button, which is located both on the Registration tab (shown above) and in the Course Registration Management. Once clicked, the Assessment will open in a new window as defined in the **Common** tab of the Assessment.

4. Users will then answer each question to the best of their knowledge and click **Next** to proceed to the next question. Upon completion of the assessment, users will be given their score.

5. Once the Pre-Assessment has been completed, the registration is considered complete and the users’ registration status is moved to **In Progress**.

6. If at any time the user wishes to review their Pre-Assessment test they can do so simply by going to the Course Management screen while the course is **In Progress** or the Transcript once the course has been **Completed**. On the Course Management screen, click the name of the Assessment to open and review. On the Transcript, click the **Status** name (pending, passed, or failed) to open and review.

7. **Post-Assessments**: Any Post-Assessment must be completed before the course status can be changed to **Completed** and the course moved to the user’s Transcript. Once a user has gone to their Course Management screen and clicked **Complete** they will be prompted to take the Post-Assessment.

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**Above: Pre-Assessment and Post-Assessment Links in Transcript**
8. There are a number of locations where the user will be instructed to complete the Post-Assessment:
   a. Immediately after clicking Completed on the Course Registration Management screen.
   b. In the user’s My Learning.
   c. On the home page, above the My Learning Record.

9. Users will answer each question to the best of their knowledge and click Next to proceed to the next question. Upon completion of the Assessment, users will be given their score.

10. Once the Post-Assessment has been completed, the course is considered complete, the user’s registration status is moved to Completed, and the course is moved into the user’s Transcript.

11. If at any time the user wishes to review their Post-Assessment test they can do so simply by going to the Transcript once the course has been Completed. On the Transcript, click the Status name (pending, passed, failed) to open and review.

Users and Evaluations

1. Evaluations are very similar to Assessments, but evaluations are not always mandatory.

2. For a mandatory Evaluation, users must complete the Evaluation before the course will be considered complete and moved into their Transcript.

3. There are a number of locations where the user will be instructed to complete the Evaluation:
   a. On the course Registration Tab.
b. In the user’s My Learning.
c. On the home page, above the My Learning Record.

4. If an Evaluation is not mandatory, the course will be moved directly into the user’s transcript. Users will then be able to take the evaluation at any time by clicking the Evaluation name from their Transcript. Users will also be reminded of the evaluation with the Pending Evaluations link on their home page.

Managing User Assessments and Evaluations

Assessments

1. All assessment information can be found in the Course Roster. In order to get to the Course Roster simply click the Administration tab, then click Courses/Course List, find your course in the resulting list and then click the Roster icon.

2. The roster will display the Pre and Post Assessment status of every user in the roster.

3. In order to view the answers of a user’s Pre or Post Assessment simply click the Status Type (pending, passed, failed) to open the Assessment and review the questions.

Note: If your Pre/Post Assessment has any subjective questions associated with it, you are responsible for reviewing the Assessment and manually passing or failing the user’s Assessment. To update the user’s Assessment with a pass or fail grade, simply click the pencil icon next to the Status Type (in this case “pending”). On the resulting screen mark either “Pass” or “Fail” and click “Save” to continue.
Evaluations

1. The information for Evaluations is obtained through an Excel export. To export evaluation information for a course click the Administration tab, then click Reports, click Evaluation Results, and finally click Click Here to Generate Evaluations Report.

2. Select the name of your course in the Courses drop-down list.

3. Select the name of your Evaluation from the resulting list of Course Evaluations.

4. Click Create Report. You will generally be prompted to either Save or Open the report. If you choose to open it immediately as opposed to saving it, be sure to save a copy from Excel.
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. The 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. The 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, http://www.adlnet.org

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
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 NOT currently supported.

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 below. Before sending you these files, we must receive from you a signed copy of a non-disclosure agreement concerning the player technology. 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.

- PHP version

0. **Prerequisite:** Your web server must have the PHP curl library installed. This library may already be installed by default. You can determine whether the library exists on your server by uploading the attached file Phpinfo.php to your web server. Then access that page from a web browser and perform a search for the word `curl`. If you find `curl` in the body of the page, then the PHP curl library is installed; otherwise you will need to either visit the PHP web site for instructions on installing the curl library or else contact KMi for instructions on using an emulation layer for the PHP curl library.
1. Copy the file Relay.php into a folder on your server. If you are using the curl emulation layer, unzip the contents of Curlemu.zip into this same folder. Ensure this folder is set up with the ability to execute PHP pages.

2. Unzip the contents of Player.zip into the same folder which contains Relay.php.

3. Navigate to the Scripts folder and edit the Config.js file located there.

4. Set the options in Config.js as appropriate for your server:
   a. For TRAIN Production:
      ```javascript
      this.webServiceUrl = "https://webservices.train.org/ScormBridge/Communicator.asmx";
      ```
   b. For TRAIN Staging:
      ```javascript
      this.webServiceUrl = "http://demo.train.org/ScormBridge/Communicator.asmx";
      ```
   c. This must be set to true: `this.useProxy = true;`
   d. This must be set to the URL of the Relay.ASPX page located on your server:
      ```javascript
      this.proxyUrl = "http://domain.com/path/to/Relay.aspx";
      ```
   e. This specifies the error message HTML to display to end users when issues are encountered: `this.unavailable`
   f. To edit colors for the navigation pane display edit the `this.colorX` variables.
   g. To change the logo displayed in the navigation pane replace `images/logo.gif` with an image of the same size.

- **ASP.NET 2.0 version**

0. **Prerequisite: .NET Framework version 2.0** Your server must have the .NET Framework v2.0 installed in order to use the ASP.NET version of the SCORM player.

1. Unzip the contents of Relay.zip into a folder on your server.

2. Do the following in IIS manager on your web server:
   a. Find the folder containing the Relay.aspx file.
   b. Right click this folder.
   c. Select Properties.
   d. Click the Create button to create an application name.
   e. Select the application pool appropriate for your server.
   f. Set Execute Permissions to scripts only.
   g. On the ASP.NET tab (if applicable) select .NET 2.0.

3. Unzip the contents of Player.zip into the same folder which contains Relay.aspx and Relay.aspx.cs.

4. Navigate to the Scripts folder and edit the Config.js file located there.

5. Set the options in Config.js as appropriate for your server:
   a. For TRAIN Production:
      ```javascript
      this.webServiceUrl = "https://webservices.train.org/ScormBridge/Communicator.asmx";
      ```
   b. For TRAIN Staging:
      ```javascript
      this.webServiceUrl = "http://demo.train.org/ScormBridge/Communicator.asmx";
      ```
   c. This must be set to true: `this.useProxy = true;`
d. This must be set to the publicly-accessible URL of the Relay.ASPX page located on your server:
   \texttt{this.proxyUrl = \textquoteleft http://domain.com/path/to/Relay.aspx\textquoteright};

e. This specifies the error message HTML to display to end users when issues are encountered: \texttt{this.unavailable}

f. To edit colors for the navigation pane display edit the \texttt{this.colorX} variables.

g. To change the logo displayed in the navigation pane replace \texttt{images/logo.gif} with an image of the same size.

**Entering your SCORM Course on TRAIN**

You can also find this information in the section \textit{Entering or Modifying a Course}.

1. Your course \textbf{must} be of type \textit{online} in order to see the SCORM options.

   \begin{center}
   \begin{tabular}{l|l}
   \hline
   \textbf{Course Title:} & \textit{Sample Course} \\
   \textbf{Sponsor/Offered:} & \textit{National TRAIN} \\
   \textbf{Provider Course Number:} & \\
   \textbf{Select Format:} & \textit{Web-based Training - Self-study (Online)} \\
   \hline
   \end{tabular}
   \end{center}

2. Check the box next to the text \textbf{Please select if this course is SCORM compliant}.

3. By selecting \textbf{External LMS Integration} you will prevent users from modifying their own scores (only use the \textbf{External LMS Integration} option if you are an advanced course provider and have first spoken with KM\textit{i} about using the feature)

4. Enter the URL to your course Manifest by using the \textbf{SCORM Upload Wizard}.

5. If there are users registered for your course you should \textbf{not} change the course content. Doing so may break the course for users who have not yet completed it.

6. \textit{TRAIN} prevents you from importing a new manifest if there are users still taking the course. If \textit{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 requires you to select if you are planning on hosting your own course, or if you plan on uploading your course to be played on the TRAIN servers. By selecting **Internal**, you will upload your entire course package in a .zip file. By selecting **External** you will upload your course SCORM Manifest which will establish the SCORM link between your server and the TRAIN server. On the live TRAIN site, only **External** is available.
7. Starting in March of 2009, 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 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

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- Content Location

Since the course will be external, you will need to provide the location of the course.

Please provide the location of the course content (example: http://www.domain.com/course1):
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 heath, 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 workplace). 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-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
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
- Academic Credit
- ACPE
- Adv. PDS
- ALS Coordinator
- CEC - Dental
- CEM
- Certificate of Attendance
- Certification
- CEU/CE
- CHES
- Childcare Providers
- CLE
- CME
- CNE
- Contact Hours (as a credit type)
- Dietitians CPE

- Emergency Medical Technician
- Emergency Ops Instructor
- EMS Physician
- EMT Enhanced
- EMT Instructor
- First Responder
- Instructor Candidate
- Intermediate
- Licensed Chemical Dependency Counselor
- None Offered
- Other
- PACE
- Paramedic
- PDS
- Registered Sanitarians
- 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

- **Compilation**
  - Blended Learning Series

- **Exercises**
  - Seminar (Training)
  - Workshop
  - Table Top
  - Game
  - Drill
  - Functional
  - Full Scale
Assigning Skill Levels to Courses

All course providers must assign one of three skill levels to each course listed on TRAIN. The three TRAIN skill levels—**Aware**, **Knowledgeable**, and **Advanced**—are modified from the skill levels used 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. **Aware**: An *Aware* level course provides an introductory topic overview that is appropriate for general or multiple audiences and may offer self-testing of knowledge acquired. The course is typically less than 90 minutes. It may describe steps involved in a skill, but usually does not offer skill practice time. Assignment of competencies to the course is optional, with no restrictions on the number of appropriate competencies that can be assigned. For the Core Competencies organized by eight "domains," assignment at the domain level ("within this domain") is permitted.

2. **Knowledgeable**: A course at this level provides comprehensive information or skills appropriate for specific job duties of a target audience (e.g., nurses, health educators). This course may provide practice-related exercises and simulations. Self-testing or observational feedback must be offered to evaluate skill development. This intermediate level course is typically between 90 minutes and eight hours in length. Assignment of individual Core Competencies is optional. For each competency assigned, a corresponding 90 minutes of course material is generally expected to be covered. A maximum of 10 Core Competencies and five Bioterrorism and Emergency Readiness competencies may be assigned for this level course.

3. **Advanced**: An *Advanced* course provides intensive instruction, reinforcement of skills, and evaluation against an observable or measurable performance standard. The course must provide 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 to a semester or more in length. This course is geared towards building proficiency and may be part of a larger curriculum with prerequisites. Assignment of individual competencies, as appropriate, is required for this level of course. For each competency assigned, a corresponding eight hours of course material is generally expected to be covered. A maximum of five competencies can be assigned for this level course.
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 either the Core Competencies for Public Health Professionals (Core) or the Bioterrorism and Emergency Readiness Competencies (BT/ER). If your course is not competency based, you should select Not Applicable.

<table>
<thead>
<tr>
<th>Suggested Assessment Factors</th>
<th>Aware</th>
<th>Knowledgeable</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skills Practice / Demonstration</td>
<td>Not required</td>
<td>Encouraged</td>
<td>Required</td>
</tr>
<tr>
<td>Related to Job Duties of Target Audience</td>
<td>Encouraged</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>Course Length (Estimated)</td>
<td>30-90 Minutes*</td>
<td>90 Minutes – 8 Hours*</td>
<td>8 Hours – Semester*</td>
</tr>
<tr>
<td>Assignment of Competencies to Course</td>
<td>Encouraged</td>
<td>Encouraged</td>
<td>Required</td>
</tr>
<tr>
<td>Number of Competencies</td>
<td>Unlimited*</td>
<td>Up to 10 Core*</td>
<td>Up to 5*</td>
</tr>
<tr>
<td>Assessment (Pre / Post)</td>
<td>Not required</td>
<td>Encouraged</td>
<td>Required</td>
</tr>
<tr>
<td>Self-Testing or Observational Feedback</td>
<td>Encouraged</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>Graded Exam / Performance Evaluation</td>
<td>Not required</td>
<td>Encouraged</td>
<td>Required</td>
</tr>
<tr>
<td>Credit</td>
<td>Not required</td>
<td>Encouraged</td>
<td>Encouraged</td>
</tr>
<tr>
<td>Performance Based Certificate</td>
<td>Not required</td>
<td>Not required</td>
<td>Encouraged</td>
</tr>
</tbody>
</table>

* 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?

| Core Competencies for Public Health Professionals |
| Council on Linkages Between Academia and Public Health Practice |

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* 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.

<table>
<thead>
<tr>
<th>Bioterrorism and Emergency Readiness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columbia University School of Nursing Center for Health Policy</td>
</tr>
</tbody>
</table>

Assuring that the nation’s public health workforce is ready to respond to emergencies has been a key focus of action and research for the past several years. Emergency preparedness training of public health workers is being designed to assure that all workers have the competencies needed for an effective response. “Bioterrorism and Emergency Readiness: Competencies for all Public Health Workers” is the result of two years of research under the direction of Kristine M. Gebbie, RN, Dr.PH, funded by the Centers for Disease Control and Prevention (http://www.phppo.cdc.gov) These competencies build on the core emergency preparedness competencies developed by the Center for Health Policy (http://www.nursing.hs.columbia.edu/institute-centers/chphsr/index.html) in 2000 and have been used by the Mailman School of Public Health Center for Public Health Preparedness (http://cpmcnet.columbia.edu/dept/sph/CPHP/index.html) and other preparedness centers in their training activities.

NOTE: This information is used with permission from the Bioterrorism and Emergency Readiness Competencies website (http://www.nursing.hs.columbia.edu/institute-centers/chphsr/index.html).

Do Competencies Apply to Every Course?

No. Unless a course is specifically designed to achieve the Core Competencies or is related to bioterrorism and emergency readiness, course providers should select Not Applicable and skip the competencies section when entering a course on TRAIN.

Choose “Not Applicable” 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.

Only courses in the “Terrorism / Emergency Readiness” subject area can be assigned Bioterrorism and Emergencies Readiness competencies.

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

TRAIN uses the following list of Core Competencies for Public Health Professionals.*

For Aware-level courses, course providers may choose to select competencies at the "domain level" for one or more of the eight domains below, instead of assigning individual competencies to a course.

Addresses competencies (unspecified) within the domains listed below:

- Analytic/Assessment Skills
- Policy Development/Program Planning Skills
- Communication Skills
- Cultural Competency Skills
- Community Dimensions of Practice Skills
- Basic Public Health Sciences Skills
- Financial Planning and Management Skills
- Leadership and Systems Thinking Skills

Addresses specific competencies below:

Analytic/Assessment Skills
- Defines a problem
- Determines data uses and limitations
- Selects and defines variables
- Identifies data sources
- Evaluates data and identifies gaps
- Applies ethical principles to data
- Community partnering about data collected
- Makes inferences from data
- Obtain and interpret risks/benefits
- Applies data collection processes
- Recognizes data's effect on public health

Policy Development/Program Planning Skills
- Collects and interprets information
- Writes clear policy options or statements
- Identifies public health laws and regulations
- Articulates implications of policy
- States expected outcomes of policy
- Utilizes current decision analysis techniques
- Decides appropriate actions
- Translates policy into organization plans and programs
- Prepares and implements emergency response plans
- Develops evaluation programs

Communication Skills
- Communicates effectively
- Solicits input from relevant partners
- Advocates for public health and resources
- Leads and participates in groups
- Communicates by media, technology, and networks
- Presents information accurately
- Listens, respects and promotes other perspectives

Cultural Competency Skills
- Interacts appropriately towards all persons
- Identifies factors that determine public health delivery
- Develops and adapts approaches inclusive to culture
- Understands cultural diversity
- Understands the importance of a diverse workforce

Community Dimensions of Practice Skills
- Maintains linkages with key stakeholders
- Utilizes leadership skills to build partnerships
- Collaborates to promote public health
- Identifies operations of public and private organizations

Basic Public Health Sciences Skills
- Identifies responsibilities within Essential Public Health Services
- Defines health status, determinants and factors influencing prevention and use of health services
- Understands the historical development of health systems
- Identifies and applies public health research methods
- Applies basic health sciences
- Identifies and retrieves current relevant scientific evidence
- Identifies research limitations, observations and interrelationships
- Develops a commitment to critical thinking

Financial Planning and Management Skills
- Develops and presents a budget
- Manages programs within budget constraints
- Applies budget processes
- Develops strategies for budget priorities
- Monitors program performance
- Prepares proposals for external funding
- Applies human relation skills to program management
- Manages information systems
- negotiates and develops contracts for services
- Conducts cost analyses for effectiveness, benefit, and utility

Leadership and Systems Thinking Skills
- Creates a culture of ethical standards
- Helps create key values and shared vision to guide action
- Identifies internal and external issues that impact delivery of essential public health services
-Facilities collaboration with groups and key stakeholders
- Promotes team and organizational learning
- Contributes to organizational performance standards
- Uses legal and political systems to effect change
- Applies organizational theory to professional practice

*This list is based upon the Core Competencies for Public Health Professionals, developed by the Council on Linkages Between Academia and Public Health Practice, www.trainingfinder.org/competencies.
### Bioterrorism and Emergency Readiness Competencies (Consolidated and Shortened)

TRAIN uses the following list of Bioterrorism and Emergency Readiness (BT/ER) competencies.*

<table>
<thead>
<tr>
<th>Core BT/ER Competencies</th>
<th>Related Sub-Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ 1 Describe the public health role in emergency response in a range of emergencies that might arise.</td>
<td><strong>Communicate</strong> public health information and roles accurately to all emergency response partners. <strong>Evaluate and review</strong> the public health laws of the jurisdiction on a regular schedule.</td>
</tr>
<tr>
<td>□ 2 Describe the chain of command in emergency response.</td>
<td><strong>Describe</strong> the chain of command and management system for emergency response. <strong>Maintain</strong> regular communication and agreements with emergency response partners.</td>
</tr>
<tr>
<td>□ 3 Identify and locate the agency emergency response plan.</td>
<td><strong>Ensure</strong> that the agency has a written, updated and available plan for major categories of emergencies. <strong>Identify</strong> specific resources needed for response to critical biologic agents.</td>
</tr>
<tr>
<td>□ 4 Describe individual functional role(s) in emergency response and demonstrate the role(s) in regular drills.</td>
<td><strong>Identify</strong> your functional role in the agency’s bioterrorism and emergency response plan.</td>
</tr>
<tr>
<td>□ 5 Demonstrate correct use of all communication equipment for emergency communication (phone, fax, radio, etc).</td>
<td></td>
</tr>
<tr>
<td>□ 6 Describe communication role(s) in emergency response within the agency, using established communication systems for the agency, general public, personal and media.</td>
<td><strong>Establish and evaluate</strong> a public health communication infrastructure for decision support during a bioterrorism or emergency event. <strong>Ensure</strong> development and delivery of accurate risk communication messages during a bioterrorism or emergency event.</td>
</tr>
<tr>
<td>□ 7 Identify limits to own knowledge, skills, and authority, and identify key systems for referring matters that exceed these limits.</td>
<td></td>
</tr>
<tr>
<td>□ 8 Recognize unusual events that might indicate an emergency and describe appropriate action.</td>
<td><strong>Participate</strong> in continuing education to maintain up to date knowledge.</td>
</tr>
<tr>
<td>□ 9 Apply creative problem solving and flexible thinking to unusual challenges within an individual’s functional responsibility and evaluate effectiveness of all actions taken.</td>
<td><strong>Apply</strong> appropriate public health measures to ensure continued population protection.</td>
</tr>
</tbody>
</table>

* This list is based on the Bioterrorism and Emergency Readiness Competencies developed by the Columbia University School of Nursing Center for Health Policy, funded by the U.S. Centers for Disease Control and Prevention, [http://cpmcnet.columbia.edu/dept/nursing/institute-centers/chphsr/btcomps.html](http://cpmcnet.columbia.edu/dept/nursing/institute-centers/chphsr/btcomps.html).
The TRAIN conference feature is designed to allow administrators to create an 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. ‘**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.
3. **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.

4. **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.

   iii. Although a contact website is not required, if there is an appropriate website for the contact, enter this information in the URL field.

   iv. Click the Add button once all required contact information has been supplied.

   v. 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 anytime.

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. Conference Certificates
a. If you wish to add a certificate to the conference, do that here.

b. The **Add Certificate** button.
   i. Clicking this button will allow you to add a new certificate for this conference.
      This requires entering the required information in the **Add Certificate** interface.
      1. Required information for this interface includes only the **Certificate Type**
         dropdown menu from which you must make a selection.
   ii. If you wish to enter certificate note, you can do so in the **Note** field. This
      information is not required.
   iii. Once all information has been entered for the **Add Certificate** interface, click the
      **Save Certificate** button and you will be redirected to the previous page.

c. The **Certificates** list
   i. This is a list of the certificates which have been added for this conference.
   ii. You can use the standard **Pencil** and **Delete** icons to edit and delete certificates
      as necessary.

4. **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 \(\rightarrow\) 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 tracks, 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 as 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.

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.

5. **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, I will refer to such a location 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.

6. 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.

7. 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.

8. 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.

9. 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.

10. 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.

11. 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.

12. 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.

   iv. It is helpful to note that the roster, assessment and evaluation features for the conferences will act and respond exactly 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 in the drop-down list of courses/conferences.
I. General Policies and Liability Terms

1. TrainingFinder.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 TrainingFinder.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 TrainingFinder.org and TRAIN sites by any person. PHF is not responsible for erroneous, defamatory, or illegal information submitted to TrainingFinder.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 TrainingFinder.org site. TRAIN Affiliates have access to review course data on TrainingFinder.org for assessment and planning purposes, but have no authority to sell or otherwise transfer any information from the national TrainingFinder.org site or any data from another Affiliate to any person(s) without the prior written consent of PHF.

6. Data from TrainingFinder.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 TrainingFinder.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 TrainingFinder.org and TRAIN, or for any other reason; or (c) delete duplicate or inappropriate records.

8. 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 TrainingFinder.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 TrainingFinder.org and TRAIN, or for any other reason; or (c) delete duplicate or inappropriate records.

9. The goods and services provided within the TrainingFinder.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 TrainingFinder.org or TRAIN.

10. Access delays, errors or unavailability of the site may occur due to modification or maintenance of TrainingFinder.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 TrainingFinder.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 TrainingFinder.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 TrainingFinder.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 TrainingFinder.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 TrainingFinder.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 TrainingFinder site, 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, e-mail, 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. TrainingFinder.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 so we may address the issue.

By registering as a user on any TrainingFinder.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 TrainingFinder.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 TrainingFinder.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 e-mail 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 TrainingFinder.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 TrainingFinder.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 TrainingFinder.org.
• Course providers that primarily serve non-Affiliate jurisdictions may register to list courses on TrainingFinder.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 info@phf.org so we may address the issue.

By registering as a course provider at any TRAIN Affiliate site or TrainingFinder.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, e-mail, 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 TrainingFinder.org and TRAIN sites.
Partners and Sponsors

Funding Partners
Funding support for TrainingFinder.org or TRAIN has been provided by:

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

Centers for Disease Control and Prevention http://www.cdc.gov

Health Resources and Services Administration http://www.hrsa.dhhs.gov

Public Health Foundation http://www.phf.org

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The Robert Wood Johnson Foundation www.rwjf.org

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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. http://www.kmionline.com
Contact Information

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

Contacting PHF for Non-Technical Support
1300 L. Street NW, Suite 800
Washington, DC 20005
Telephone: 202-218-4400
Fax: 202-218-4409
E-mail: training@phf.org
Website: www.train.org or www.phf.org

Contacting KMi for Technical Support
Technical support is provided by KMi staff and is available during the following hours:

- **Phone**: (614) 224-0664 ext. 202
- **Hours**:
  - Monday-Thursday: 7:00 AM (EST) - 12:00 AM (EST)
  - Friday: 7:00 AM (EST) - 8:00 PM (EST)
  - Saturday: 12:00 PM (EST) - 6:00 PM (EST)
  - Sunday: 6:00 PM - 12:00 AM (EST)

- **E-mail**: support@train.org

KMi’s General Contact Information:

- Address: 330 West Spring Street, Suite 110
  Columbus, Ohio 43215 USA
  Phone: 614.224.0664
  Email: support@kmionline.com