

# The College of Direct Support Administrator Training Manual



STATE OF NEW JERSEY  
DEPARTMENT OF HUMAN SERVICES  
DIVISION OF DEVELOPMENTAL DISABILITIES

THE ELIZABETH M. BOGGS CENTER  
ON DEVELOPMENTAL DISABILITIES  
Department of Pediatrics



ROBERT WOOD JOHNSON  
MEDICAL SCHOOL  
University of Medicine & Dentistry of New Jersey

Last updated 3.3.11

For Technical Assistance on using the College of Direct Support send an email to:

**CDSTA@umdnj.edu**

## ***The NJ Partnership for Direct Support Professional Workforce Development***



*“It’s about the Quality... of supports that a well-trained workforce provides.”*

*“It’s about the Value... of professionalism gained through the College of Direct Support state-of-the-art training”.*

*“It’s about the Future... of Direct Support Professionals and the lives of people with developmental disabilities”*

The College of Direct Support offers online learning and education to provide the Direct Support Workforce with more opportunities to strengthen the knowledge and skills needed to support people with disabilities. The goal is to provide a variety of opportunities to support the careers of direct support professionals.



**The New Jersey  
Direct Support Professional  
Workforce Development Coalition**

***Mission:*** *To promote the recruitment and retention of a professional workforce to enhance the quality of direct supports for people with disabilities and their families*

# **NJ Direct Support Professional Workforce Development Coalition**

## Organization Representation

- Alliance for the Betterment of Citizens with Disabilities (ABCD)
- The Arc of New Jersey
- Consortium for Workforce and Economic Development/Community Colleges of New Jersey
- Department of Human Services
- Division of Developmental Disabilities
- Division of Disability Services
- The Elizabeth M. Boggs Center on Developmental Disabilities
- New Jersey Association of Community Providers (NJACP)
- New Jersey Council on Developmental Disabilities
- Family Representation
- DSP Representation

## **CDS Capabilities**

- State of the Art Curriculum developed in partnership with an editorial board of national experts
- Tracking Training
  - E-Learning
  - In-Person Pre-Service Classroom training
  - Certification
- Compliance with CMS requirements through centralized tracking of the 5 pre-service trainings (First-Aid, CPR, Overview, Medication, Preventing Abuse & Neglect)

## **Capabilities cont'd.**

- Addition of linked content
- Announcements
  - State & Agency levels
- Tracking Hire Dates
- Reports on agency and individual levels

## **Use of the CDS for Agencies**

- Pre-Service Training Tracking – Minimum Requirement
- Offering Training on a course-by-course basis – Benefit, Optional
- Offering the NJ Career Path – Benefit, Optional

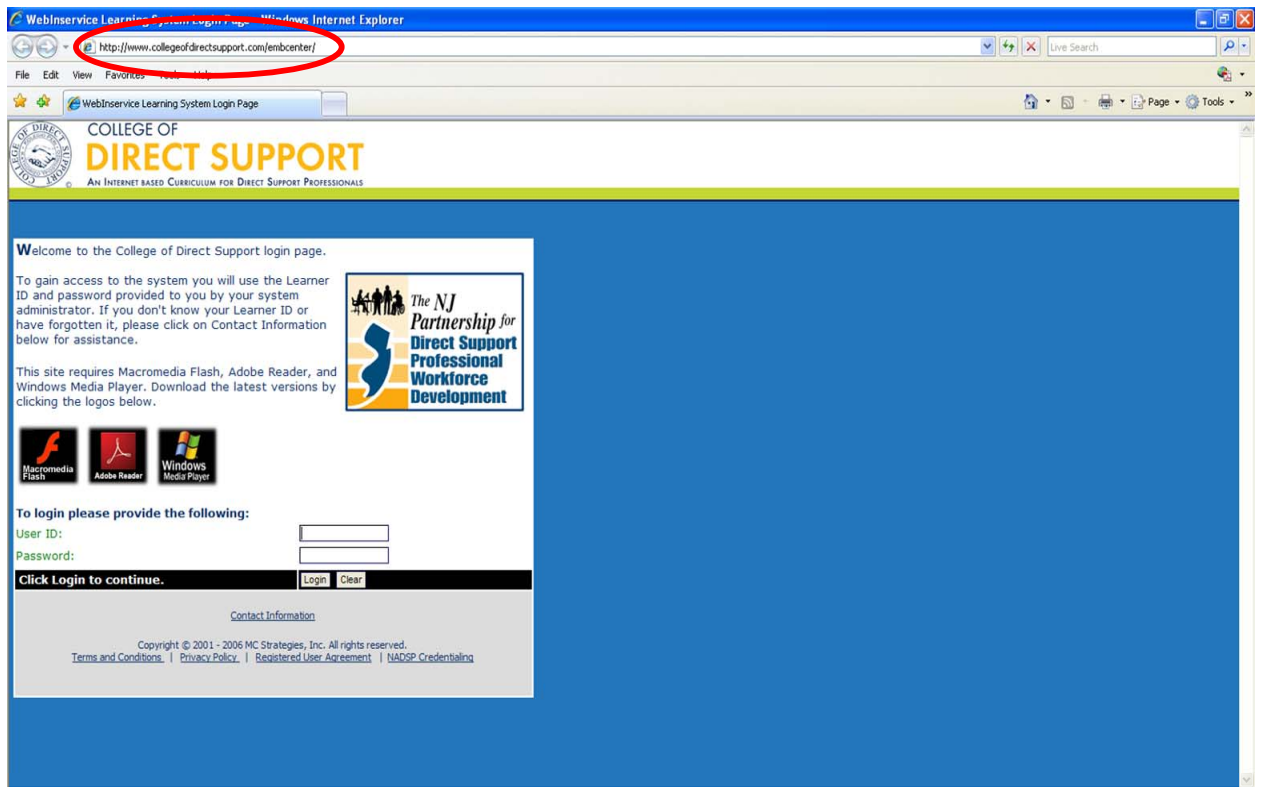
# You are a CDS Agency Administrator...

- Skills / Attributes
  - Basic computer skills
  - Attention to detail
  - Good communicator
  - Manager
  - Planner
  - Organizer
  - Instructor
  - Assertive
  - Motivational
  - Empowering





# NJPDSPWD CDS Login Page



Be sure to have the correct address (<http://www.collegeofdirectsupport.com/EMCenter/>)

Google may yield another CDS site.

There is also a link to the New Jersey College of Direct Support Log in page on the DDD website: <http://www.state.nj.us/humanservices/ddd/home/>

Once on the website scroll down until you see the New Jersey Partnership for Direct Support Professional Workforce Development logo. The link will take you to the NJ Partnership website.

User ID's are: First Initial, Last Name, Last 4 Digits of Person's Social Security # (Ex. Joe Schmoe will be: **jschmoe1234**). If the learner has two last names include them both (Ex: Joe Brown-Williams will be **jbrownwilliams1234**).

ID's are not case sensitive.

Default password is hello

# Home – Personal Page

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Home | E-learning | Classes & Events | Surveyor | Discussion | Tools | **Administration** | Logout | Help

Demonstration Purpose - New Jersey DHS/DDD

Personal Page for: **Demonstration Purpose**

**Manage**

My E-learning Lessons  0 lessons due

My Classes & Events  0 event scheduled in the next 15 days

My Announcements  1 new announcements.  
0 acknowledgements due.  
0 acknowledgements overdue.

My Surveys

My Discussions  0 Discussions scheduled in next 30 days 0 New Postings

My Ontrack Items  0 ontrack item due in the next 30 days

**Quick Links**

Self Enroll - Classes & Events

Self Enroll - E-learning

Change My Password

References

**Reports**

My Transcript - All Training

Credits Earned

Click Below To Access Additional Information about the CDS Product

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All learners will have a personal page that looks like this.

**Learner Page:** Is for your online courses. In order to do Administrative activities you need to go to Administration.

To access the **Administrator's Homepage** click on “**Administration**” on the toolbar.

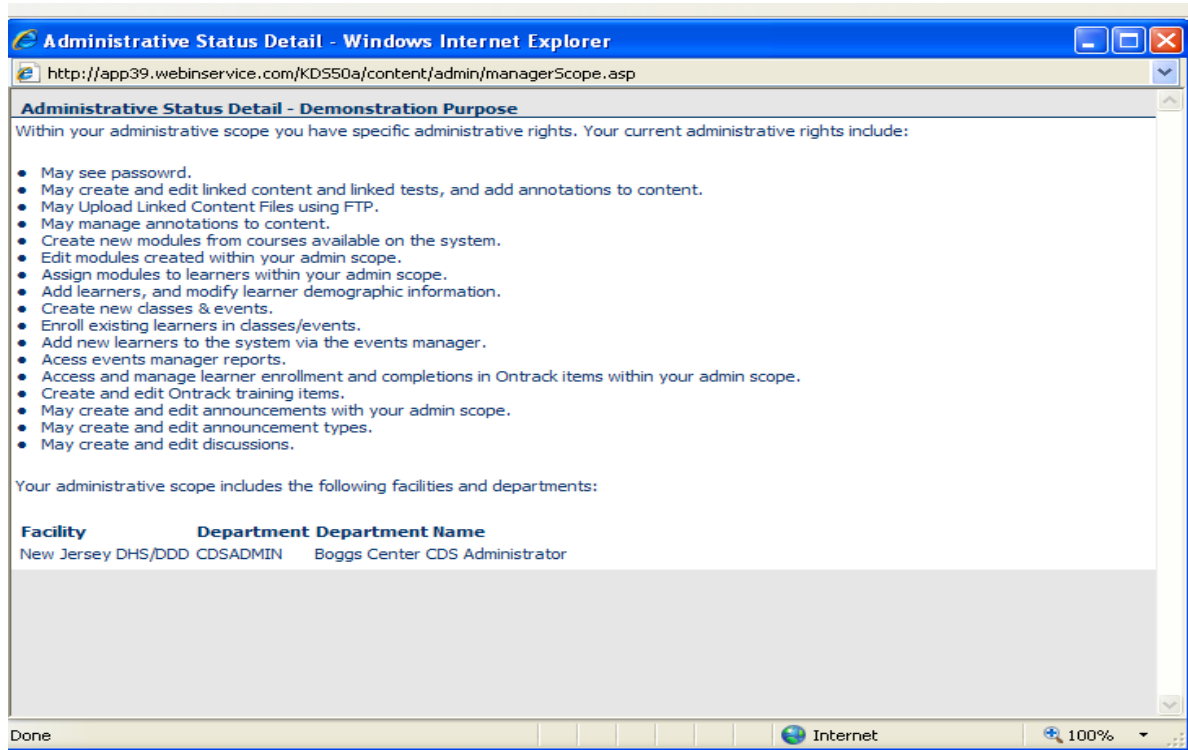
Learners without administrative rights will not have the administration option on their toolbar.

# Home – Administration

The screenshot shows the 'Administration Home Page' of the College of Direct Support. At the top left is the logo for the College of Direct Support, with the text 'COLLEGE OF DIRECT SUPPORT' and 'AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS'. To the right of the logo is the text 'Demonstration Purpose - New Jersey DHS/DDD'. Below the logo is a navigation menu with buttons for Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The main content area is titled 'Administration Home Page' and contains several sections: 'Manage' with links for 'E-learning / Individual' and 'E-learning / Department', each with a 'View' button; 'Quick Links' with links for 'Lookup Learners' and 'Help Documents', each with a 'View' button; and 'Administrative Status Summary' with the text 'Your administrative scope includes 1 departments across 1 facilities. Within this scope you will have specific administrative rights.' and a link 'Click here to view your administrative status detail.' which is circled in red. At the bottom of the page, there is a copyright notice: 'Copyright © 2001 - 2010 MC Strategies, Inc. All rights reserved.' and links for 'Terms and Conditions', 'Privacy Policy', 'Registered User Agreement', and 'NADSP Credentialing'.

To view your Administrative Status Detail **“Click Here”**.

# Administrative Scope



A list of your administrative rights will appear (your administrative status may vary depending on your agency).

As an Agency Administrator you will only have access to learners from your own agency unless otherwise specified.

**Facility:** All agencies in New Jersey are under the New Jersey DHS/DDD facility unless otherwise specified.

**Department:** This is the name of your agency.

# **Adding New Learners**

# Learners – Add New Learner



Learners form the basis for this system. Once a learner is entered into the LMS, you can assign him/her lessons and then track and report on e-learning and classroom training.

## Working with Learners consists of:

- Using the naming mechanism, which will be the same for all learners in New Jersey.
- Gathering Learner information
- Adding a Learner
- Editing a Learner
- Making Learners that no longer work for your agency 'inactive'
- Looking up (finding) a specific Learner (includes finding a Learner's password)

## Selecting a Naming Format

***NJ DDD requires that the following format be used JDoeXXXX, where XXXX is the last four digits of a learner's social security number, using this format for all learners will eliminate the chance of duplicate learner IDs.***

Each learner must have a unique identifier. If you enter a learner ID that already exists in the system, check with your System Administrator to see if this person has been added in the system by another agency. It's important that you do not attempt to put someone in the system using another user ID if they are already in the system.

All learning, both online and in-class, are attached to the learner user ID, all prior information can NOT be transferred to the new user ID. Although other information about the learner can be changed, the user ID can not be changed.

**Note:** You will only be able to add learners to your agency unless otherwise specified.

**Note:** When you add a Learner manually and include an email address, the LMS gives you the option to send an email notifying the newly added Learner.

### **Steps to Add a Learner**

From the menu bar, select **Learners - Add New Learner**.

# Learners – Add New Learner

COLLEGE OF DIRECT SUPPORT  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDO

Home System Access Learners E-learning Discussion Knowledge Manager Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Add New Learner

Add to Facility: 01 - New Jersey DHS/DDO Select Facility

**Required Information**

Sort Departments by  Dept Code  Dept Name

Dept: CDSADMIN - Boggs Center CDS Administrator select from the list

Learner ID:  up to 120 characters

First Name:  up to 30 characters

Last Name:  up to 30 characters

**Optional Information**  
Enter the following information as required for your organization.

Birth Date:

Verification Code:

Sub Dept:

Position Code:

Hire Date:

E-Mail:

Check this box to give this Learner access to the Change Management System.

Check this box to protect Learner from auto-termination during HR download processing.

Check this box to Exempt learner from automatic assignments made during HR download processing.

Skills Preceptor - May Grade Skills Checklists

Knowledge Manager Preceptor - May Grade Knowledge Manager Checklists

Grade Discussion Participants

The Add New Learner page opens. All entries in **red lettering** are required fields.

Gathering learning information before beginning will be very helpful if you have a number of Learners to add to the system. Make sure you have first and last names, the e-mail address and the last four digits of all new learners social security numbers handy. The correct spelling of first and last names and last 4 digits of the SS# is very important since they are used in creating the learner's Learner ID and in other features of the system (rosters, certificates, etc...).

**Note:** Learner IDs cannot be changed once they are saved.

## Adding a Learner

Adding a learner is, simply, entering the learner information into the system. Learners will have no access to eLearning until they are entered into the system.

**Note:** When you add a Learner manually and include an email address, the LMS gives you the option to send an email notifying the newly added Learner.



From the 'Add to Facility' drop-down at the top left of the page, select a Facility for the new Learner.

**(Mandatory)** From above the Dept: drop-down, select how you want the departments sorted, either Dept Code or Dept Name.

**(Mandatory)** From the Dept: drop-down, select a department for the new Learner.

**(Mandatory)** Enter the following required fields. All entries in red are required.

**Learner ID (up to 120 alphanumeric characters, no spaces) - NJ DDD requires that the following format be used for Learner ID –**

User ID's are: First Initial, Last Name, Last 4 Digits of Person's Social Security # (Ex. Joe Schmoie will be: **jschmoie1234**). If the learner has two last names include them both (Ex: Joe Brown-Williams will be **jbrownwilliams1234**).

**Learner's First Name (up to 30 characters)**

**Learner's Last Name (up to 30 characters)**

**Note: Names cannot contain spaces, periods, and hyphens.**

The default password for every new Learner is "hello."

Optional Information:

Birth Date - **optional**

Verification Code –**optional** used, in combination with a learners first and last name, to provide the learner help in remembering their Learner ID and password. Usually the last 4 digits of the learner's SSN are used as a verification code. Other values may be used, but whatever your organization uses must be consistent

Sub Dept – **optional** used to provide the system a secondary sort for reporting; useful when a department contains a number of functional areas.

Position Code – **optional** (your agency may want to come up with codes for different positions within your agency)

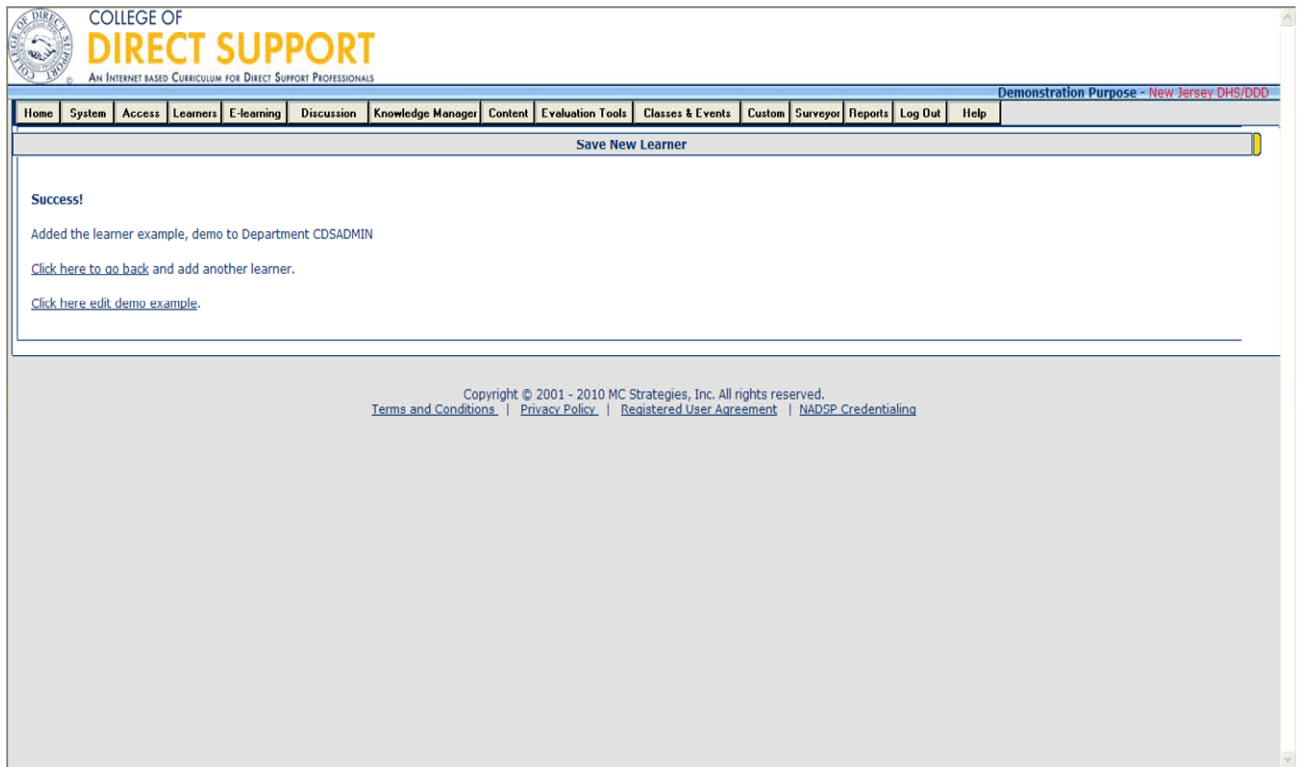
Hire Date - **MANDATORY**

**Recommended:** e-mail address – **optional (if an email address is provided, the Learner will receive a email every time they are registered for a course – online and in class)**

**The last 6 check boxes should remain unchecked.**

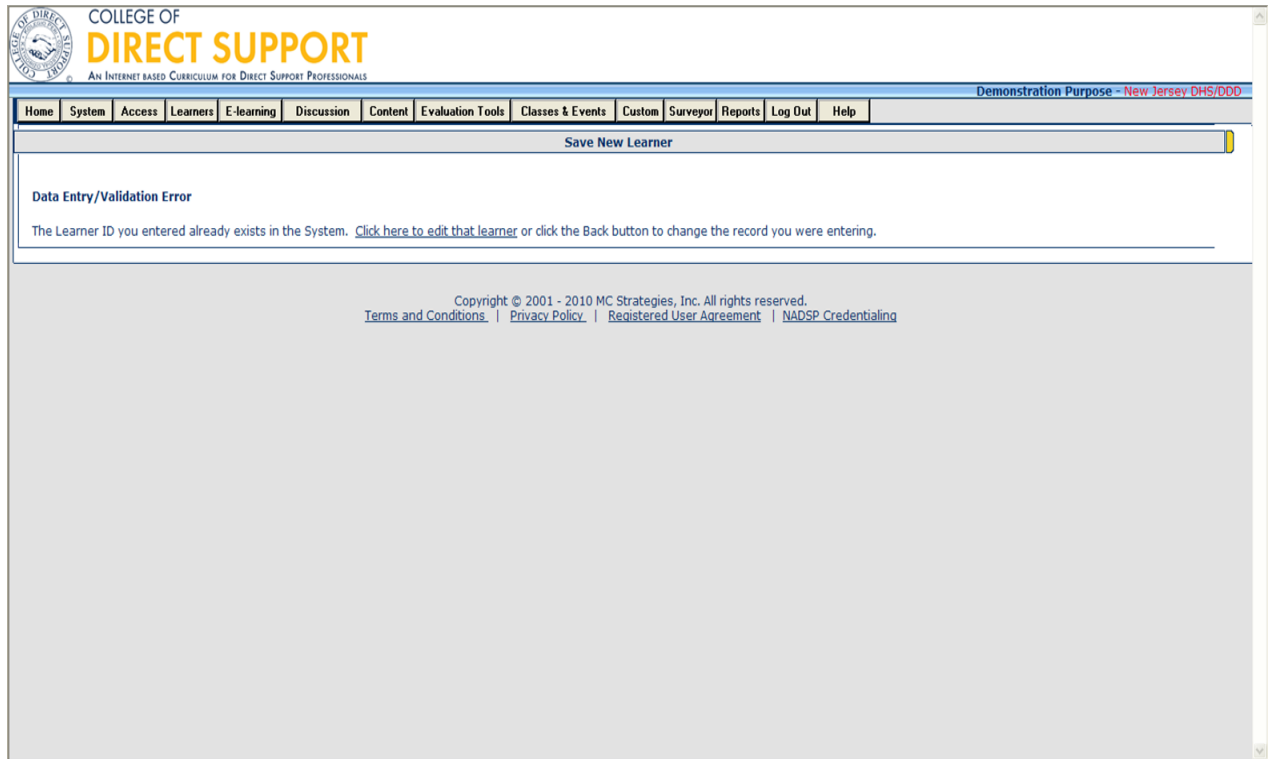
Select the **Save** button at the top right of the page.

# Learners – New Learner – Saved



Once you have successfully added a new learner you are returned to the 'Save New Learner' page and the message "Success!" displays in the upper left and the option to "Click here to go back and add another Learner" or to return to edit the Learner you just added.

# If Learner Already Exists...



If you try to enter a Learner into the system and the Learner already exists, you will get an error message. If the Learner is in a department you have access to you can change their status from active to inactive, or change their department. It is encouraged that you find out more information about why a Learner has been marked inactive before changing their status (i.e. ask the Learner if they no longer work for the agency/department listed, contact the agency for the department they are currently in).

\*If you do not have access to the department the Learner is in, then email the System Administrator and you will be instructed on what to do next.

You will need to complete a form to have access rights to Learners. Contact your System Administrator: **System Administrator Info: CDSTA@umdnj.edu**

# **Looking Up and Editing Learner Information**

# Learners



There may be an occasion when you will need to change some learner information. This could include changing the Learner's last name, changing the Learner's status between active and inactive, etc.

**Note:** Learner IDs cannot be changed.

From the menu bar, select **Learners - Lookup Learners**.

The Lookup Learner page opens.

# Learners – Look Up Learner

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Home System Access **Learners** E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Demonstration Purpose - New Jersey DHS/DDD

Lookup Learners

Include inactive learners

Search by Last Name:  Or Search by Learner Id

Search by Verification Code:  **Search**

Notes:  
- **Lookup Learners** will find learners within your administrative scope (the facilities and departments for which you have been granted administrative access.)  
- This search is not case-sensitive. Searching for "Abbot" or "ABBOT" or "abbot" will return the same results.

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Enter all or part of the Learner's last name. (Or you can search by Learner ID.)

**Note:** Instead of entering all or part of a learner's last name you can enter a **percent sign (%)** as a wild card. This finds a list of all the Learners in your system. Keep in mind that if you have a larger number of learners, this search could take some time.

Click the **Search** button (or press the **Enter** key).

A list of one or more Learners displays.

# Look Up Learner – Example

COLLEGE OF DIRECT SUPPORT  
**DIRECT SUPPORT**  
 AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDO

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Look Up Learners

Include inactive learners

Search by Last Name:  Or Search by Learner Id

Search by Verification Code:

Notes:  
 - **Look Up Learners** will find learners within your administrative scope (the facilities and departments for which you have been granted administrative access.)  
 - This search is not case-sensitive. Searching for "Abbot" or "ABBOT" or "abbot" will return the same results.

The following learners match the specification you provided:

Lastname	First, MI	UID	Password	Facility	Dept	Pos.	Active	Admin	Edit	Transcript	Manage Training	Send Email
example	demo	dexample1111	hello	01	CDSADMIN		Yes	No	<input type="button" value="Edit"/>	<input type="button" value="Transcript"/>	<input type="button" value="Manage Training"/>	<input type="button" value="Send Email"/>
example	demo	dexample2222	hello	01	CDSADMIN		Yes	No	<input type="button" value="Edit"/>	<input type="button" value="Transcript"/>	<input type="button" value="Manage Training"/>	<input type="button" value="Send Email"/>

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From the last name, first name and middle initial, find the specific Learner from the list.

**Note:** You may have two or more learners with the same name. Check the User ID (UID) before making changes/ checking transcript for the learner.

From the Learners information you can see the following:

Learner's password

Learner's Facility name

Learner's department name

Learner's position (optional)

From the Active column, if the Learner column displays a "Yes" then the Learner is 'Active' in the LMS, if a No displays then the Learner is considered 'Inactive.'

From the Admin column, if the Admin column displays a "yes" then the Learner is an administrator, if a No displays then the Learner is Not an Administrator on the LMS.

Click the “**Edit**” button on the right, you can make changes to the Learner’s name, email, status, view e-learning, and other information.

Click the “**Transcript**” button on the right, you can view the Learner’s Transcript.

Click the “**Manage Training**” button on the right, you can view and edit the Learner’s lesson.

Click the “**Send eMail**” button on the right, you can open and send a registration email that contains your Learner ID, the LMS web site address, registration letter and the email address of the Learner. When you are ready to email, click the **Send** button in the upper-right of the page.



# Look Up Learner – Change Status

The screenshot shows the 'Edit Learner' interface. At the top, there is a navigation menu with options like Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The main content area is titled 'Edit Learner' and contains the following sections:

- Learner Status:** Shows 'Learner is ACTIVE' with a 'Make Inactive' button circled in red. There is also an 'E-learning' button and a 'Save Changes' button circled in red.
- Required Information:** Includes fields for Learner ID (dexample1111), Password (hello), First Name (demo), Last Name (example-one), and Dept (CSDemo - Admin Demo). It also has a 'Select Learner' button and a 'Select Learner' button.
- Optional Information:** Includes fields for Sub Dept., Position Code (12), Birth Date (12/6/1965), Hire Date, Verification Code, and E Mail (dummyemail@umdnj.edu). There is also a 'Group Membership' section with an 'Add Group' button.

At the bottom, there are three checkboxes for system access: 'Grant learner access to the Change Management System.', 'Protect learner from auto-termination during HR download processing.', and 'Exempt learner from automatic assignments made during HR download processing.'

There may be an occasion where a learner no longer needs access to the training system and you no longer want them to show up in your reports. Learners are NOT deleted from the system instead they are made 'inactive'.

On this page you can change any information listed for the staff except their User ID and password.

**Position Code, Sub Dept., Verification Code:** You can have staff sorted by departments within your agency by giving them a position code. Your organization will have to determine what they will be and how they should be organized. You may want to have them sorted by departments in your agency: i.e. Residential, Day Hab, Res Hab, Home Care, TBI, Cambria Res, Lower Central, etc... Once the alternate identifiers have been assigned you will be able to

assign training to staff per the alternate identifier: i.e. Cultural Competence assigned to all Res Hab staff.

**Note:** Inactive Learners can be made 'active' as needed. If the Learner is in a department you have access to you can change their status from active to inactive, or change their department. It is encouraged that you find out more information about why a Learner has been marked inactive before changing their status (i.e. ask the Learner if they no longer work for the agency/department listed, contact the agency for the department they are currently in before changing the Learner status).

If you do not have access to the department the Learner is in, then email the System Administrator with the first and last name, SS# or User ID for the learner you need access to.

# Look – Up Learner - Transcript

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Lookup Learners

Include inactive learners

Search by Last Name:  Or Search by Learner Id

Search by Verification Code:

Notes:  
- **Lookup Learners** will find learners within your administrative scope (the facilities and departments for which you have been granted administrative access.)  
- This search is not case-sensitive. Searching for "Abbot" or "ABBOT" or "abbot" will return the same results.

The following learners match the specification you provided:

Lastname	First, MI	UID	Password	Facility	Dept	Pos.	Active	Admin				
example	demo	dexample1111	hello	01	CDSADMIN		Yes	No	Edit	Transcript	Manage Training	Send Email
example	demo	dexample2222	hello	01	CDSADMIN		Yes	No	Edit	Transcript	Manage Training	Send Email

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You can only view transcripts for learners that are within your administrative scope.

# Learner - Transcript

Transcript - Show All - demo example

Status: All Current  
Assigned/Self-Enrolled: All  
Show Module?

Print Export  
Clear Settings  
Go

Total: 7 Completed: 0 Due: 7

Show All E-learning Classes & Events Ontrack Checklist Acknowledgements Discussion

Item Name	Item Type	Due Date	Status	Completed	Score	# of Units	Type of Unit	Provider	Self Enroll/Assigned
Direct Support Professionalism: Introduction	Lesson	11-24-2010	X				Contact Hours	CDS	A
Direct Support Professionalism: Becoming a Direct Support Professional	Lesson	11-24-2010	X				Contact Hours	CDS	A
Direct Support Professionalism: Contemporary Best Practices	Lesson	11-24-2010	X				Contact Hours	CDS	A
Direct Support Professionalism: Applying Ethics in Everyday Work	Lesson	11-24-2010	X				Contact Hours	CDS	A
Direct Support Professionalism: Practicing Confidentiality	Lesson	11-24-2010	X				Contact Hours	CDS	A
Direct Support Professionalism: Working with Your Strengths and Interests	Lesson	11-24-2010	X				Contact Hours	CDS	A

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You can print specific information from the Learner's transcript. Learner transcripts can include E-Learning, Classes & Events, Ontrack, Checklists, Acknowledgements and Discussions. You may choose to print transcripts that reflect all or one of these options.

# Learner Look Up – Manage Training

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDC

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Lookup Learners

Include inactive learners

Search by Last Name:  Or Search by Learner Id

Search by Verification Code:

Notes:  
- **Lookup Learners** will find learners within your administrative scope (the facilities and departments for which you have been granted administrative access.)  
- This search is not case-sensitive. Searching for "Abbot" or "ABBOT" or "abbot" will return the same results.

The following learners match the specification you provided:

Lastname	First, MI	UID	Password	Facility	Dept	Pos.	Active	Admin				
example	demo	dexample1111	hello	01	CDSADMIN		Yes	No	Edit	Transcript	Manage Training	Send Email
example	demo	dexample2222	hello	01	CDSADMIN		Yes	No	Edit	Transcript	Manage Training	Send Email

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You may view, add, and/or edit all online and in classroom trainings assigned to the Learner.

# Look Up Learner – Manage Training/ E-Learning

COLLEGE OF DIRECT SUPPORT  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Manage E-learning - demo example-one

To select a learner to manage, click the **Select Learner** button.

E-learning Detail E-learning Assign Modules E-learning Lesson Management Class & Event Completions Class & Event Management Class & Event Enrollment

E-learning Detail - by Module Assigned  
Learner: **example-one, demo**

Sort by Complete By Date Sort by Module Name

**Module: Becoming a Supervisor** Remove Reassign

Assigned Lesson (click to view Introduction)	Credits By	Due Date	Completed On	Learning Completed	Testing Completed	Score	Pretest Completed	Pretest Score
<a href="#">CFSM: Preparing for the Supervisor's Job in Human Services: Introduction</a>		01-30-2011						
<a href="#">CFSM: Preparing for the Supervisor's Job in Human Services: Supervisors and Their Roles</a>		01-30-2011						
<a href="#">CFSM: Preparing for the Supervisor's Job in Human Services: Professional Relationship Building</a>		01-30-2011						
<a href="#">CFSM: Preparing for the Supervisor's Job in Human Services: Understanding Leadership</a>		01-30-2011						
<a href="#">CFSM: Preparing for the Supervisor's Job in Human Services: Communication in a Supervisory Role</a>		01-30-2011						
<a href="#">CFSM: Preparing for the Supervisor's Job in Human Services: Supervising Diverse Work Teams</a>		01-30-2011						

**Module: DIC: Cerebral Palsy** Remove Reassign

Assigned Lesson (click to view Introduction)	Credits By	Due Date	Completed On	Learning Completed	Testing Completed	Score	Pretest Completed	Pretest Score
<a href="#">DIC: Cerebral Palsy</a>		01-30-2011						

**Module: EMB - CFM - Training & Orientation** Remove Reassign

Assigned Lesson (click to view Introduction)	Credits By	Due Date	Completed On	Learning Completed	Testing Completed	Score	Pretest Completed	Pretest Score
<a href="#">CFSM: Training and Orientation: Introduction</a>		11-01-2010						
<a href="#">CFSM: Training and Orientation: Understanding Training</a>		11-01-2010						

This is one way to manage/ assign E-Learning to Learners. The Manage E-Learning option will allow you to see all E-Learning that has been assigned to a Learner and assign them additional E-Learning.

# Look Up Learner – Send Email

COLLEGE OF DIRECT SUPPORT  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Lookup Learners

Include inactive learners

Search by Last Name:  Or Search by Learner Id

Search by Verification Code:

Notes:  
- **Lookup Learners** will find learners within your administrative scope (the facilities and departments for which you have been granted administrative access.)  
- This search is not case-sensitive. Searching for "Abbot" or "ABBOT" or "abbot" will return the same results.

The following learners match the specification you provided:

Lastname	First, MI	UID	Password	Facility	Dept	Pos.	Active	Admin				
example	demo	dexample1111	hello	01	CDSADMIN		Yes	No	Edit	Transcript	Manage Training	Send Email
example	demo	dexample2222	hello	01	CDSADMIN		Yes	No	Edit	Transcript	Manage Training	Send Email

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You can also send email to the Learner to let them know they have been added to the system.

# Sending Email

The screenshot shows a web browser window with the following elements:

- Header:** COLLEGE OF DIRECT SUPPORT, AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS. Demonstration Purpose-onetwo - New Jersey DHS/DDD
- Navigation Menu:** Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, Help
- Section:** Email Learner
- Form Fields:**
  - From:** support@mcstrategies.com (with a Send button)
  - To:** dummyemail@umdnj.edu
  - Cc:** (empty field)
  - Subject:** Welcome to online learning
  - Message:** You have been registered in the MCStrategies Learning Management System (LMS) by your Administrator. The Learning System is located on the web at <http://www.collegeofdirectsupport.com/EMBCenter>. To log in and begin learning you will need the following credentials: Your Learner ID is:dexample1111

The default password for every new Learner is “**hello**.”

**Note:** Encourage all of your Learners to change the password when they first login to the system.

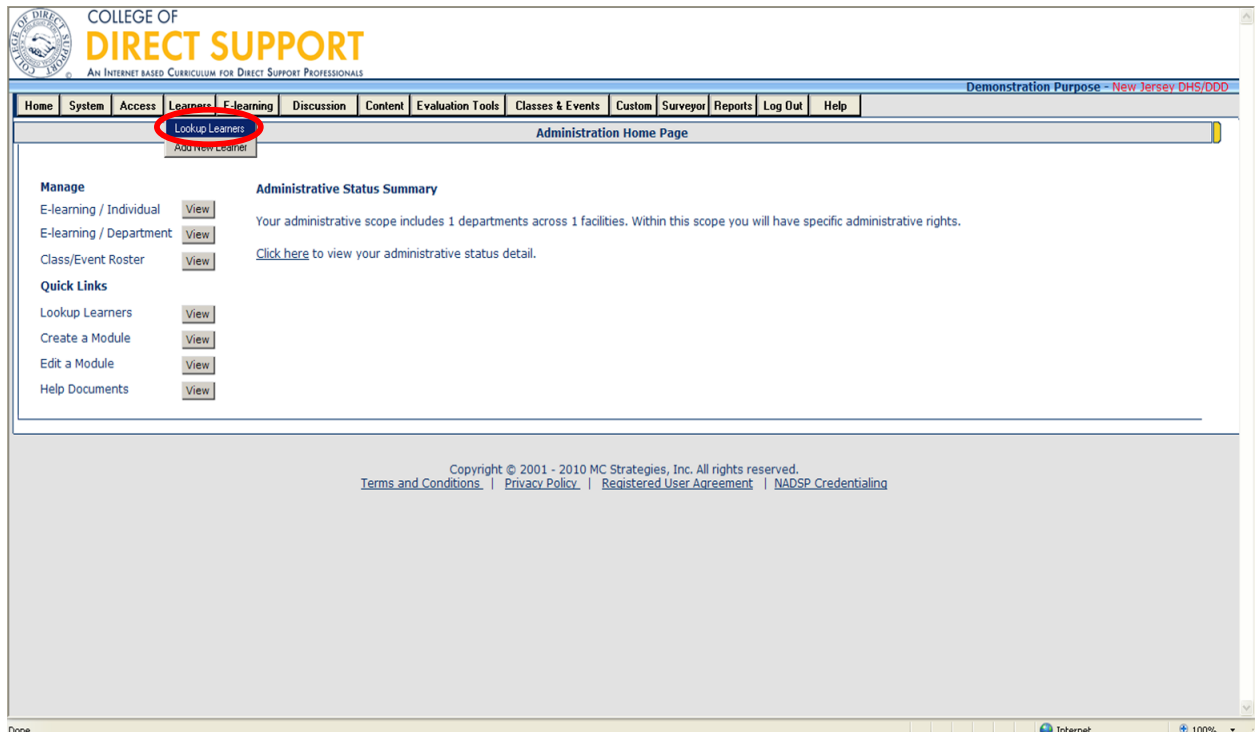
**Tip:** You can change or add the following on the registration email: To, CC, Subject line, and body message. The system will automatically include the Learner’s User ID and password in the body of the message.

Complete as you would an ordinary email, then click “**Send**”.



# Changing Learner Status (When a Learner No Longer Works for Your Agency )

# Changing Learner Status



There may be an occasion when you will need to change the Learner status (i.e. if the employee resigns from your agency, if the employee is terminated, etc.). Once an employee/Learner leaves your agency their Learner Status must be changed as soon as possible.

From the menu bar, select **Learners – Lookup Learners**.

The Lookup Learner page opens.

# Changing Learner Status

COLLEGE OF  
**DIRECT SUPPORT**  
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Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Lookup Learners

Include inactive learners

Search by Last Name:  Or Search by Learner Id

Search by Verification Code:

Notes:  
- **Lookup Learners** will find learners within your administrative scope (the facilities and departments for which you have been granted administrative access.)  
- This search is not case-sensitive. Searching for "Abbot" or "ABBOT" or "abbot" will return the same results.

The following learners match the specification you provided:

Lastname	First, MI	UID	Password	Facility	Dept	Pos.	Active	Admin				
example	demo	dexample2222	hello	01	CDSADMIN		Yes	No	<input type="button" value="Edit"/>	<input type="button" value="Transcript"/>	<input type="button" value="Manage Training"/>	<input type="button" value="Send Email"/>

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Enter all or part of the Learner's last name (or you can search by Learner ID).

Note: Instead of entering all or part of a Learner's last name, you can enter a percent sign (%) as a wild card. This finds a list of all the Learners in your system. Keep in mind that if you have a larger number of learners, this search could take some time.

Click the "**Search**" button (or press the Enter key).

A list of one or more Learners displays.

From the last name, first name and middle initial, find the specific Learner from the list.

Note: You may have two or more Learners with the same name. Check the User ID (UID) before making changes.

Click the "**Edit**" button.

# Changing Learner Status

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

**Edit Learner**

To select a learner to edit, click the **Select Learner** button.

**Learner Status**  
Learner is ACTIVE

**Required Information**

Learner ID: Unique ID:  Password:  Learner has not logged in

First Name:  up to 30 characters

Last Name:  up to 30 characters

Sort Departments by  Dept Code  Dept Name

Dept:  select from the list

**Optional Information**  
Enter the following information to support organizational needs. **Group Membership**

Sub Dept:

Position Code:

Birth Date:

Hire Date:

Verification Code:

E-Mail:

Grant learner access to the Change Management System.

Protect learner from auto-termination during HR download processing.

Exempt learner from automatic assignments made during HR download processing.

The page will refresh with the Learner's information.

Click **"Make Inactive"**, then click **"Save Changes"**.

The Learner is now inactive in the system.

**Note:** If a Learner moves from one agency to another for which you also have administrative access rights, if given permission, you may change the Learners status back to 'Active' for the new site. If you do not have administrative access for the new department, you must contact the System Administrator ([CDSTA@umdnj.edu](mailto:CDSTA@umdnj.edu)).

# Classroom Training

**Lead and Non-Lead training agencies along with agencies that are delivering their own First Aid and CPR will already have a template created for them by the System Administrator for the 5-Pre Service Trainings (do not make changes to the Pre-Service templates):**

**Course Code Course Name**

PSCPR	Pre-Service CPR
PSFA	Pre-Service First Aid
PSM	Pre-Service Medication
PSO	Pre-Service Overview
PSPAN	Pre-Service Abuse and Neglect

**To schedule a Pre-Service Training move on to the next section: Scheduling Training**

# Adding/Editing Instructors

# Classes & Events – Utilities – Instructor List

The screenshot shows the website interface for the College of Direct Support. The header includes the logo and the text "COLLEGE OF DIRECT SUPPORT" and "AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS". The navigation bar contains the following tabs: Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The "Classes & Events" menu is open, showing options: Ontrack, Utilities (highlighted in blue), and Reports. The "Utilities" sub-menu is also open, showing options: In Home Page, Instructor List (circled in red), Manage Class Locations, and Cancellation Penalties. The main content area displays "Administrative Status Summary" with a "View" button and a link to view administrative status detail. There are also "Quick Links" for Lookup Learners, Create a Module, Edit a Module, and Help Documents, each with a "View" button. The footer contains copyright information and links to Terms and Conditions, Privacy Policy, Registered User Agreement, and NADSP Credentialing.

Instructors may be Lead / Non Lead Trainers already in the database of Learners or they may be individuals who are not in the CDS.

## **To Add/Delete a Current Learner as an Instructor**

From the menu bar, select **Classes & Events — Utilities — Instructor List**.

# Classes & Events – Utilities – Instructor List

Name	Facility	Dept.	Email	Phone	Employee
<a href="#">Abaexample, Joe</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abbexample, Micheal</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abcexample, Sara</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abdexample, John</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abeexample, Barabra</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abfexample, David</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abqexample, Samantha</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abhexample, Martha</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abiexample, Jane</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>
<a href="#">Abjexample, Anthony</a>	01 New Jersey DHS/DDD		dummyemail@umdnj.edu	555-111-2222	Yes <input type="button" value="Remove"/>

In the image above, the column titled **Employee** indicates whether or not this person is a Learner on the site. **Yes** listed in this column shows they are a Learner within the system, those with **No** listed, indicate that they are an instructor who is not yet in the system.

**Tip:** You can click the instructor's name to update his/her eMail address and work phone information.

**Tip:** You can remove the instructor by clicking the **Remove** button

To add a New Instructor - Click the **New Instructor** button.

The Instructor Demographics page opens.

**Tip:** You can click the instructor's name to update his/her eMail address and work phone information.)

**Note:** You are not permitted to remove or update information for an instructor that is not from your own agency.



# Classes & Events – Utilities – Instructor List

**Instructor Demographics:**

You may add instructors by:

1. Searching for existing individuals in the system.
2. Adding names of individuals not listed in the system.

To search, use the search box below. Select the individual you want to add from those located in the search list. Edit as needed, then click **Save** to save that instructor.

To manually enter an instructor, enter as much of the information as you can in the fields below. Click **Save** to save the information.

Search by Last Name:

First name:  Last name:

Email address:

Facility:

Work phone:

## **To search for a specific instructor:**

Enter all or part of the Learner's last name in the search box.

Click "**Search**" button, select the individual you want to add from those located on the search list.

Edit as needed, then click save.

## **To manually enter a new instructor:**

Enter instructor information (first and last name, email address, and work phone number).

Choose the facility: New Jersey DHS/DDD (Note: You may have instructors that are not employees of your agency. If the instructor is a non-employee, keep "None" in the drop down box. If you add a Facility to the non-employee, the instructor displays as an Employee on the Instructor List. This applies if you have Red Cross instructors that come to your agency to do CPR classes, but are not employed by your agency).

Click 'Save'

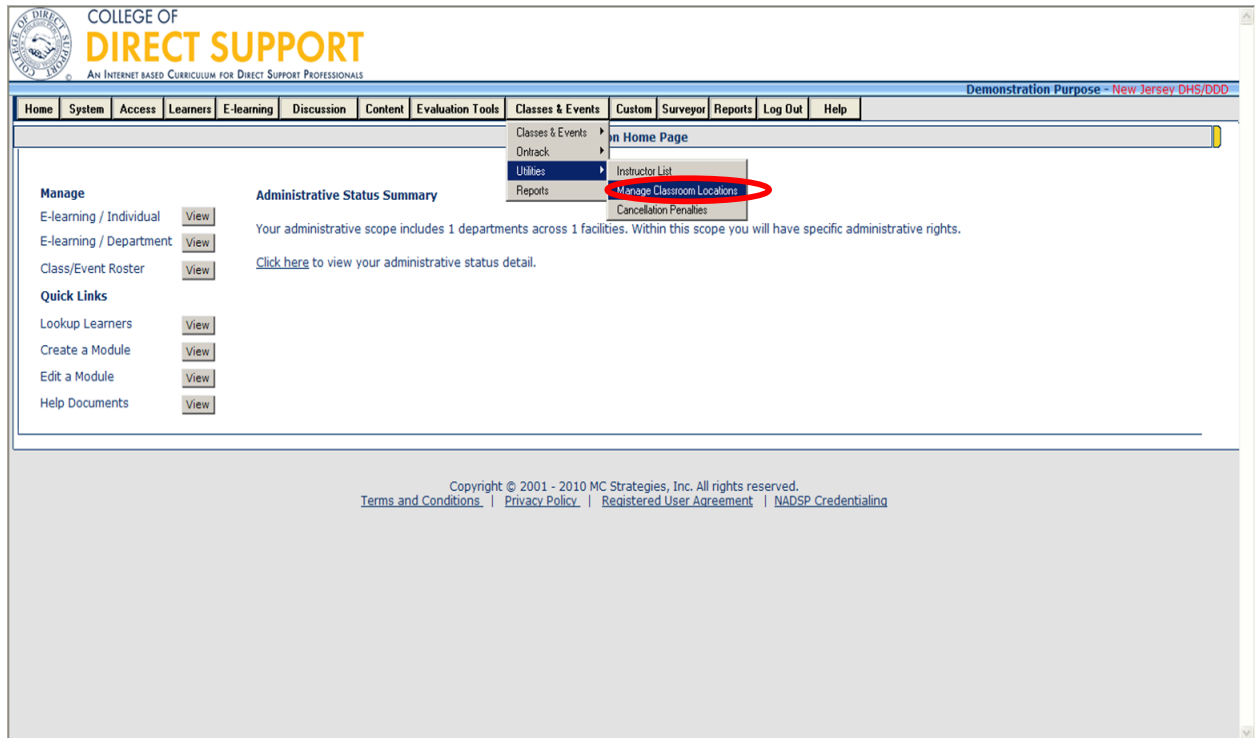
“The instructor was added” text displays.

Click the **Close** button (red ‘X’) in the upper right to close the pop-up window.

**Note:** If you want to delete an instructor, click the Remove button to the right of the name/facility of the instructor. Click **OK**.

# Adding/Editing Classroom Locations

# Classes & Events – Utilities – Manage Classroom Locations



It is best to create the classroom information in advance so the locations are available to add to your events.

## Find a classroom location for your event.

Select this feature to find and populate a classroom location and note the maximum number of occupants within the rooms that could host training sessions and meetings.

### Steps to Create a Classroom Location at a Facility:

You create the classroom locations for a facility. It is best to create the classroom information in advance so the locations are available to add to your events.

From the menu bar, select **Classes & Events — Utilities — Manage Classroom Locations**.

# Classes & Events – Utilities – Manage Classroom Locations

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Manage Classroom Locations

List classroom locations at Facility: 01 - New Jersey DHS/DDD **List**

**Add/Edit Classroom Information**

Classroom name:

Capacity:

Address:

City, State Zip

**Save as New Classroom**

**Classroom locations for New Jersey DHS/DDD**

Location (click to edit)	Capacity	Address	City/State/Zip	
<a href="#">Liberty Plaza, 3rd Floor, Room A</a>	25	335 George St. Liberty Plaza	New Brunswick, NJ 08904	3 events linked
<a href="#">Liberty Plaza, 3rd Floor, Room B</a>	55	335 George St. Liberty Plaza	New Brunswick, NJ 08904	8 events linked

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From the drop-down menu “List classroom locations at Facility” select the **facility** of the classroom, and click the **List** button. The Manage Classroom Locations page opens to Add/Edit Classroom Information and a list of the classroom locations for the selected facility display.

Add the following classroom information:

Enter a **name** for the classroom starting with your agency’s name.

Enter the **Capacity** for this classroom. (The maximum capacity of students for the classroom. – once this number of Learners enrolls, a wait list starts).

**Note:** An Event may have a maximum number of learners that is less than the location’s maximum capacity. If that is the case the Wait list starts with the maximum enrollment identified in the course.

Enter the **Address** of the location.

Enter the **City, State** and **Zip** of the classroom.

Click **Save as New Classroom** button.

The page refreshes and the new classroom displays with the existing classrooms.

**Note:** If you need to make any changes to a classroom's information, simply click on the name of the classroom, and the information populates the form above; you can then edit and save your changes.

**Tip:** If you want to see classroom information from other facilities, select another facility from the drop-down menu above and the list refreshes with the classrooms for the new selected facility (this only applies if you have access to more than one facility).

# Creating a Template for New Agency Specific Classroom Training

Classroom templates for the 5 Pre-Service Trainings have already been created for you (Overview of DD, Abuse & Neglect, CPR, FA, Medication). **DO NOT** create new classroom templates for any of the Pre-Service Trainings.

To schedule a Pre-Service Training move on to the next section: Scheduling Training Lead and Non-Lead training agencies along with agencies that are delivering their own First Aid and CPR will already have a template created for them by the System Administrator for the 5-Pre Service Trainings (do not make changes to the Pre-Service templates):

**Course Code Course Name**

PSCPR	Pre-Service CPR
PSFA	Pre-Service First Aid
PSM	Pre-Service Medication
PSO	Pre-Service Overview
PSPAN	Pre-Service Abuse and Neglect

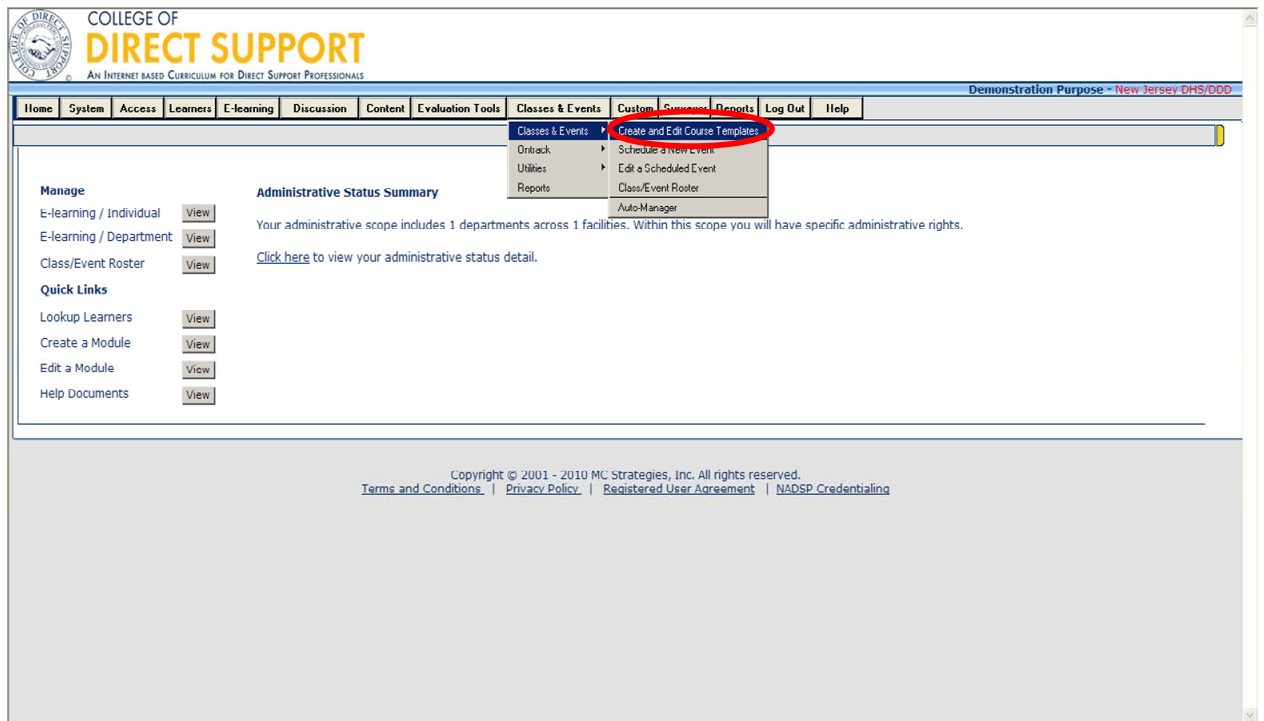
The Event Manager uses templates to create courses eliminating the duplication of work associated with multiple event scheduling. A single course may have multiple events each one being the same course offered on different days (e.g., CPR offered 20 times a year so there are 20 CPR events, not 20 separate templates).

**\*Note: When creating a new agency specific class/event remember to name the class beginning with your agency's name (i.e. Boggs Center Orientation). Failure to adhere to the naming requirements will result in deletion of the posted class/event by the System Administrator.**

**Note:** If a template for the Class/Event you would like to schedule already exists, skip ahead to Scheduling Classes & Events section.



# Classes & Events – Create Course Templates



## Creating a course template.

You can create a course template at anytime. Once you make a course template; for example, for a Time Management course, you use the template each time you are ready to schedule class.

From the menu bar, select **Classes & Events — Classes & Events — Create and Edit Course Templates.**

# Classes & Events – Create/ Edit Course Templates

Classes & Events - Create/Edit Course Template

New Course Edit Existing Course

Entries in red are REQUIRED entries

Course Code (20 characters max.): Sample Course Name (70 characters max.): Boggs Center Sample Classroom Template

Track this course in CE reports?

Description: This is an example of how to create a classroom template.

Objectives: To learn how to create a classroom template.

Min. class size: 2 Max. class size: 12 Type: Classroom Training

# Sessions: 1

Contact Hours: 6.00 Cost: \$0.00 CE Expire: (m/d/yy) Blank = Never

Nurse Planner eMail: Phone:

Contact Person Mr. Example eMail: dummyemail@umdnj.edu Phone: 555-111-2222

Location:

Addl. materials: Instructor's Manual Addl. Materials Cost: \$0.00

Special Instructions: Bring a copy of the Instructor's Manual if you can.

**\*Note:** When creating a new class/event remember to name the class beginning with your agency's name (i.e. Boggs Center Sample Classroom Template). Failure to adhere to the naming requirements will result in deletion of the posted class/event by the System Administrator.

**Tip:** All items marked in red are required items for the course and event. You may only use a course code once in the system. If the course code or name you have chosen already exists, you will be prompted to select a different course code/ course name for your template.

**Required.** Add Course Code and Name

**Course Code:** This code helps you to search for courses when you need to edit information or schedule an Event. For example, Boggs Center Sample Classroom Template is coded as Sample

**Course Name:** The course name is also the Event title that Learners see along with the scheduled dates of the event when they self-enroll.

**Note:** The course name and code is used each time you schedule an event from the course template.

Enter a description and the objectives for the course.

**Description:** Describes the course and is available on the information screen that Learners can view when self-enrolling into an event.

**Objectives:** List of the course objectives and is available on the information screen that Learners can view when self-enrolling into an event.

Enter the size and type requirements:

**Minimum class size:** Defines the minimum number of Learners required for the class to be conducted. Some classes may need to be cancelled if not enough Learners enroll.

**Maximum class size:** Sets the maximum number of Learners allowed in a class.

**Note:** If the maximum number is met, additional Learners attempting to enroll in the class are added to the waitlist.

**Type of event:** Shows Learners what kind of training the event will be and appears on the information screen on Learner's side of the system (e.g., Classroom Training, Teleconference etc.).

**# Session (Required)** – Enter the number of **Sessions** (days) to complete the event. This lets the Learners know how many days the event runs (e.g., a two-day class).

Enter the following as needed:

**Contact Hours:** Enter contact hours, (the total # of hours the training will be held for).

Cost: (does not apply)

CEU Expires: (does not apply)

Nurse Planner/eMail/Phone: (does not apply)

**Required.** Contact Person's name and eMail. Phone is optional.

**Contact Person/eMail/phone:** This information is listed on the event information page as the person to contact for assistance and is also listed in the eMail communications to Learners enrolled in the class (this could be the instructor of the class or the staff person's supervisor).

Enter the following optional items:

**Tip:** The following items can be defined at the course level, but are not required. This information can also be added when you schedule the event. Some of these items require information when you schedule the event.

Location – select a location when scheduling the class.

**Addl. Materials:** Allow additional materials to be outlined so Learners are aware of what might be required from the information window.

**Special Instructions:** This is an information field that displays on confirmation letters to Learners.

**Note:** This is an information item that displays on confirmation letters to Learners.

Additional Material Cost: (does not apply)

Click the **“Save”** button in the upper right.

# Classes & Events – Create Course Templates

COLLEGE OF DIRECT SUPPORT  
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Demonstration Purpose-onetwo - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Create/Edit Course Template

Entries in red are REQUIRED entries

Course Code (20 characters max.):  Course Name (70 characters max.):

Track this course in CE reports?

Events created 0 active and 0 archived

Description:

Objectives:

Min. class size:  Max. class size:  Type:

# Sessions:

Contact Hours:  Cost:  CE Expire:  (m/d/yy) Blank = Never

Nurse Planner:  eMail:  Phone:

Contact Person:  eMail:  Phone:

Location:

Addl. materials:  Addl. Materials Cost:

Special Instructions:

Done

Once the course information is saved, three additional buttons display across the top of the page: **Schedule This Course**, **Clone This Course**, and **Delete This Course** and two additional items display at the bottom of the page: **Search Terms** and **Prerequisites**.

**Schedule this Course** – where you create an Event by adding a date and time for the course to be held.

**Clone this Course** (not recommended)- copies the current course information and you gives it a new course code and name.

Note: If you decide to clone a course you have to give it a new course code and course name.

**Delete this Course** – once learners have been enrolled in a scheduled course the template can not be deleted.

**Search Terms:** Define search terms the Learners may use when they are looking for the event to self-enroll. For example, if your organization offers CPR, but internally you all might refer to that course as CPR, Cardiac Life Support, or just Life Support. You can put each of these terms in the Search Terms field and the site displays this course if any of these terms are used when a Learner searches.

**Prerequisites Course List: This is for informational purposes and should be used to identify courses that must be completed prior to enrolling into this course.** This list is generated from the other courses already in the Events Manager Course list. If an item does not exist in Events Manger, it will not show up on this list.

Enter if applicable.

Click the **“Save”** button at top of page.

You are now ready to schedule this course.

# **Scheduling a Classroom Training**

# Learner Management System

## Tracking Training

- Minimum requirement of agencies is to track pre-service training of all staff
- Use of the CDS LMS to track pre-service will support DDD in meeting its CMS requirement to track these trainings in a centralized location
- Potential future benefits – reduction in paper work, streamlining licensing reviews



# Tracking Roles of Agencies & Training Agencies

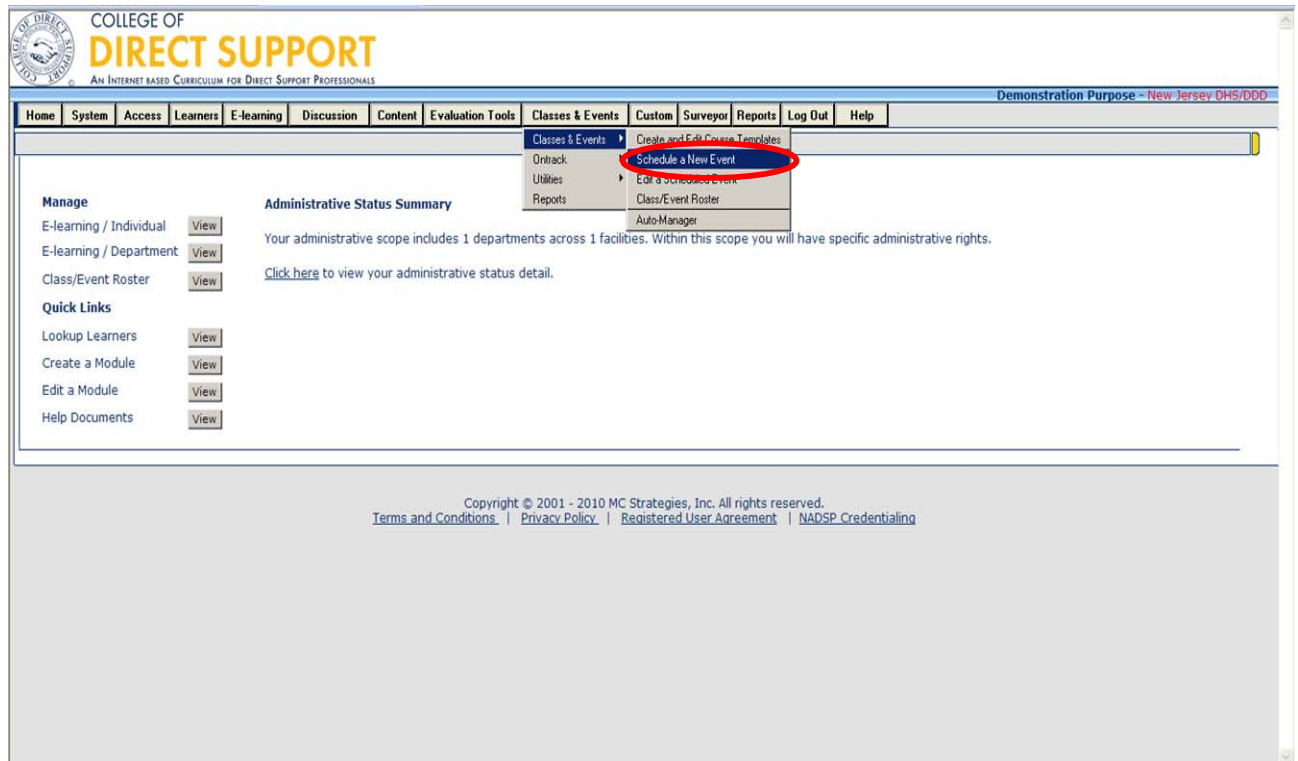
## Agencies

- **Enroll** all learners in the CDS
- Current Staff enrolled via bulk upload
- Enter historical pre-service training data of current staff into system using OnTrack
- Enroll new hires directly in CDS
- If you are a neither a lead or non-lead, but do your own CPR/First Aid you will need to use the system to track this data similar to the leads/non-leads

## Lead & Non-Lead Training Agencies

- Set up pre-service trainings in the system using available templates
- **Register** participants in pre-service training using CDS
- Only trainers (or their designees) can register participants into trainings they create.
- Mark final status of participant (i.e. complete, incomplete, no show...)
- Use on Track to log CPR/First Aid Expiration Dates

# Classes & Events – Schedule New Event



Scheduling an event involves adding a specific time and date along with additional required and optional items to the previously created course template.

**Lead and Non-Lead training agencies along with agencies that are delivering their own First Aid and CPR will already have a template created for them by the System Administrator for the 5-Pre Service Trainings (do not make changes to the Pre-Service templates):**

**Course Code Course Name**

PSCPR	Pre-Service CPR
PSFA	Pre-Service First Aid
PSM	Pre-Service Medication
PSO	Pre-Service Overview
PSPAN	Pre-Service Abuse and Neglect

Select **Classes & Events — Classes & Events — Schedule a New Event.**

# Classes & Events – Schedule New Event

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose-onetwo - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Schedule New Event

Classes/Events are created from course templates. To select a course template to create your class/event, enter the course code and/or a course name for the template you want to use. Click **Search** to list course templates matching your specification. Choose the one you want by clicking the course code for that course.

You may use partial criteria for your search. For example, entering 'ACLS' in the course name would find all courses beginning with ACLS.

Course code:

Course name:  Facilities:  **Search**

Course Code	Course Name	Description
<a href="#">Sample</a>	Doggis Center Sample Classroom Template	This is an example of how to create a sample classroom template.

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Enter a course code **or** name to locate a course template. You can also select a Facility where the course was created, or select 'All' for your facility. The more search criteria you enter, the more specific your search results.

Pre-Service templates

## Course Code Course Name

PSCPR	Pre-Service CPR
PSFA	Pre-Service First Aid
PSM	Pre-Service Medication
PSO	Pre-Service Overview
PSPAN	Pre-Service Abuse and Neglect

Click the **Search** button. Any Courses matching your criteria will appear on a list below.

Click the "**Course Code**" hyperlink to open the course you want to schedule.

# Classes & Events – Schedule New Event

COLLEGE OF DIRECT SUPPORT  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose-onetwo - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Schedule

View Course Create New Event Edit Existing Event Save Event

Event Name: **Sample - Boggs Center Sample Classroom Template**

Course Information

This event is New - Not Saved

Start Date: (m/d/yy) End Date: (m/d/yy)

Start Time: 12:00 PM End Time: 12:30 PM

Please Note selecting a location for this event does NOT confirm its availability. Please follow standard procedures for reserving this room/area.

Location: Select a Location

Description: This is an example of how to create a sample classroom template.

Objectives: To learn how to create a sample classroom template.

Notes:

Add. Materials: Instructor's Manual

Sessions: 1

Capacity: 12 Min. Capacity: 2

Nurse Planner: eMail: Phone:

Contact: Mr. Example eMail: dummyemail@umdnj Phone: 555-111-2222

Event Type: Classroom Training Host Facility: New Jersey DHS/DDD

Allow self-enrollment

Instructor & Credits

Instructors Credits and Hours

The Classes & Events – Schedule page opens with the course information added to the event you want to schedule.

Enter **Start Date**, **End Date**, **Start Time**, and **End Time**.

Click **“Select a Location”** button. (see next slide for popup).

# Classes & Events – Schedule New Event

Facility Name	Room/Code	Address	Location
Archway Programs	01	280 Jackson Rd.	Atco, NJ 08004
Arts Access Gallery	01	65 Highland Avenue	Peapack NJ 07977
Avenues to Independent Living	01	64A Curtis Ave	Woodbury, NJ 08096
Bancroft - 800 Building Training Room	04	800 Kings Highway N.	Cherry Hill, NJ 08034
Big Room	01	815 Cedar Bridge Ave.	Lakewood, NJ 08701
Board Room	01	1158 Wayside Rd	Tinton Falls, NJ 07712
Board Room	01	815 Cedarbridge Avenue	Lakewood, NJ 08701
Board Room	02	6550 Dellilah Rd	EHT, NJ 08234
Boggs Center Liberty Plaza, 3rd Floor, Room A		335 George St. Liberty Plaza	New Brunswick, NJ 08903
Brain Injury Association of New Jersey	01	825 Georges Road	North Brunswick, NJ 08902
CARINGHouse Meeting Room	01	101 West Dcatur Ave.	Pleasantville, NJ 08232
Choose your own location	01	0	0
CODI Training Room	01	901 Atlantic Avenue	Egg Harbor City, NJ 08215
Community Options Forked River Office	01	202 North Main Street	Forked River NJ 08731

Either select a **Facility** from the drop-down or choose **all locations**. Click the “**List**” button. The Classroom list displays. Any Classroom that has any events assigned displays the event code, the name of the event, and start and end times for each event listed.

**Note:** If there is a conflict of events for a classroom, when you save the event you will be warned that the location is already assigned to another event.

Click the **Location name** and the classroom is added to the event, then close the pop-up window.

**Note:** Entering a location here does not confirm the availability of the room. Follow your normal facility procedures to reserve the classroom.

# Classes & Events – Schedule New Event

COLLEGE OF DIRECT SUPPORT  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose-onetwo - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveys Reports Log Out Help

Classes & Events - Schedule

View Course Create New Event Edit Existing Event **Save Event**

Event Name: **Sample - Boggs Center Sample Classroom Template**

Course Information

This event is **New - Not Saved**

Start Date: 03/30/2011 (m/d/yy) End Date: 03/30/2011 (m/d/yy)

Start Time: 09:00 AM End Time: 05:00 PM

**Please Note** selecting a location for this event does NOT confirm its availability. Please follow standard procedures for reserving this room/area.

Location: Boggs Center Liberty Plaza, 3rd Floor, Room A Select a Location

Description: This is an example of how to create a sample classroom template.

Objectives: To learn how to create a sample classroom template.

Notes:

Addl. Materials: Instructor's Manual

Sessions: 1

Capacity: 12 Min. Capacity: 2

Nurse Planner: eMail: Phone:

Contact: Mr. Example eMail: dummyemail@umdnj Phone: 555-111-2222

Event Type: Classroom Training Host Facility: New Jersey DHS/DDD

Allow self-enrollment

Instructor & Credits

Instructors Credits and Hours

The location you have chosen will appear in the location box on the page.

Click **“Save Event”** at the top or bottom of the page. **(You must save the event before you can select an instructor or make visibility selections).**

A pop up will appear **“Saved Successfully”** and the page will refresh with the new information if your event was saved.

# If unable to save event...



If you try to save an event and it conflicts with an already existing event for the same location, date, and/or time you will receive an error message.

Click the back button on your browser to make corrections, then try saving again.

# Classes & Events – Schedule New Event Cont'd

## Selecting Instructor(s)

Click on “**Select Instructor**” button. A pop up will appear.



# Classes & Events – Schedule New Event – Select Instructor(s)

Enter all or part of the last name of the instructor you are looking for. To narrow your search to a single facility, select that facility from the list.

Last name:  Facility:

Available Instructors		Selected Instructor(s)
Name	Facility Phone	
<input type="radio"/> Abaexample, Joe 01	555-111-2222	

Enter the last name of the instructor you want to add to the event.

Click the **Search** button.

Select the instructor's name from the available list and click **Select**. The instructor's name will move from the left column (Available Instructors) to the right column (Selected Instructor). Close this window when complete.

# Classes & Events – Schedule New Event Cont'd

Notes:

Addl. Materials: Instructor's Manual

Sessions: 1

Capacity: 12 Min. Capacity: 2

Nurse Planner:

Contact: Mr. Example eMail: dummyemail@umdnj Phone: 555-111-2222

Event Type: Classroom Training Host Facility: New Jersey DHS/DDD

Allow self-enrollment

**Instructor & Credits**

Instructors: Select Instructor(s)

Credits and Hours

Contact hours: 8

CE's: 0 Credits by:

CE's Expire:

Event is Co-provided: No With Whom:

**Visibility**

Everyone can enroll in this event  Limit enrollment

Publish Only (Prevent Online Enrollment)

**Enrollment Information**

Enrollment begins: (m/d/yy) Blank = Immediate

Enrollment ends: 3/30/2011 (m/d/yy) Blank = Event Start

Cancel by: (m/d/yy) Blank = Event Start

Cancel penalty:

Wait List Closes: (m/d/yy) Blank = Event Start

Do not send email

Automatic Notification: Confirmation of Enrollment - Std View

Cancellation Letter: Cancellation - GENERIC View

Special Instructions: Bring a copy of the instructor's manual if you can.

Fees & Discounts

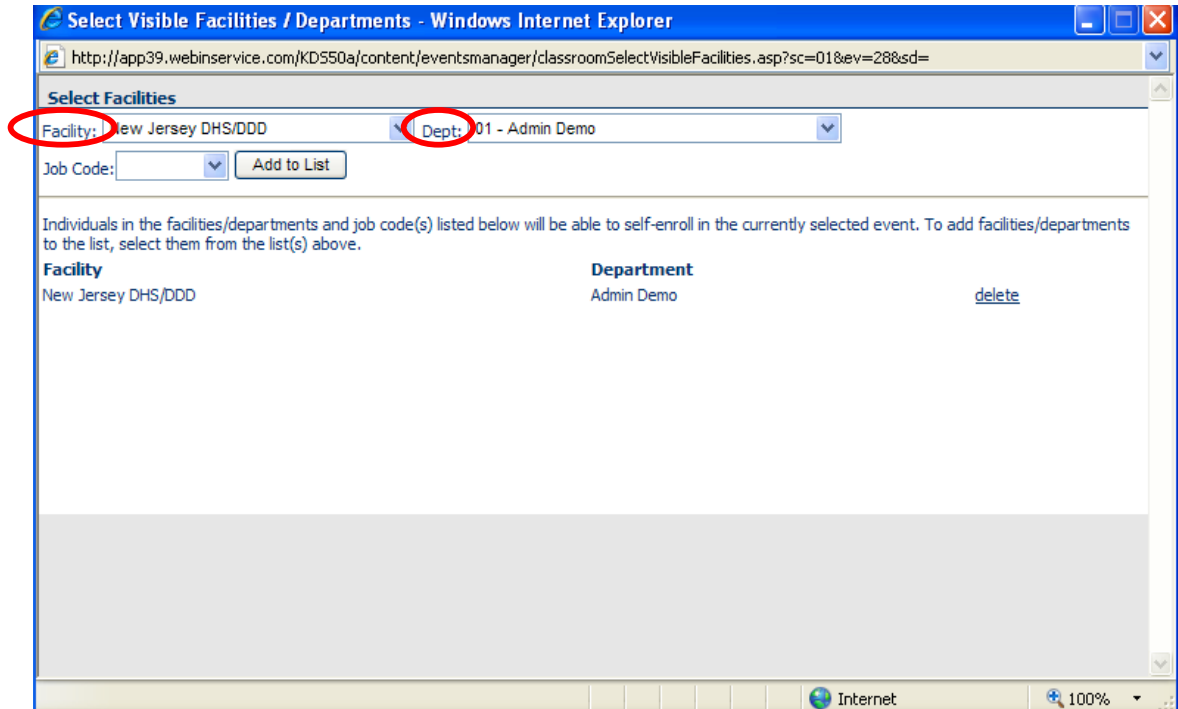
## Select Visibility (Who can enroll in an event?)

Visibility limits who can enroll in an event. An administrator determines which facilities and/or departments can see this event for enrollment. You should limit visibility to your own department (or facility if applicable).

Click checkbox to the left of the **'Select Facilities/Departments'** button then click the **'Select Facilities/Departments'** button. Complete the window that opens (select facility and department and/or job code, then click add to list – see next slide for sample).

**Note:** The **Publish Only** option allows Learners to see the event being offered, but requires that each Learner contact an administrator to be enrolled (self-enrollment option must be chosen in order for Learners to see the Publish only events). If you want to allow everyone to enroll in the event, click the **'Everyone can enroll in this Event'** radio button.

# Selecting Visibility



Select facility and department and/or job code, then click **“Add to List”**.

The list of the departments you have chosen to make the event visible to will appear below.

# Classes & Events – Schedule New Event (cont'd)

**Instructors**  
Select Instructor(s)

**Credits and Hours**  
Contact hours: 6  
CE's: 0 Credits by:  
CE's Expire:  
Event is Co-provided: No With Whom:

**Visibility**  
 Everyone can enroll in this event  Limit enrollment Select Facilities/Departments

**Enrollment Information**  
Publish Only (Prevent Online Enrollment)   
Enrollment begins: (m/d/yy) Blank = Immediate  
Enrollment ends: 3/30/2011 (m/d/yy) Blank = Event Start  
Cancel by: (m/d/yy) Blank = Event Start  
Wait List Closes: (m/d/yy) Blank = Event Start  
 Do not send email  
Automatic Notification: Confirmation of Enrollment - Std. View  
Cancellation Letter: Cancellation - GENERIC View  
Special Instructions: Bring a copy of the instructor's manual if you can.

**Fees & Discounts**  
Early Enroll Date: (m/d/yy) Blank = None  
Early Enroll Disc: \$0.00 (dollars)  
Discount Info:  
Group Discount: \$0.00 (dollars)

Fees	Additional Charges	Other Fees
Host Facility: \$0.00	\$0.00	No Show: \$0.00
Discount: \$0.00	\$0.00	
Other Facility: \$0.00	\$0.00	
Other: \$0.00	\$0.00	

Save Event

**Tip:** If you do not want to have a Wait list for an event, make the Wait List date the same date that enrollment begins.

**Do not send email:** If you do not want to send any emails for a specific event to your Learners, select the 'Do not send email' selection.

**Automatic Notification:** Enrollment confirmation emails sent by the LMS to Learners include event name, date of event, start and end times, location, any special instructions and other miscellaneous information.

Click the View button to the right, and the letter opens and you can print the letter. Only Learners that have eMail addresses in the system will be sent a registration confirmation.

**Cancellation Letter:** If an Event is cancelled, a Cancellation letter that conveys cancellation information to Learners is sent by email. Click the View button on the right to see the contents of the 'Cancellation' letter. Only Learners that have eMail addresses in the system will be sent a 'Cancellation confirmation' letter.

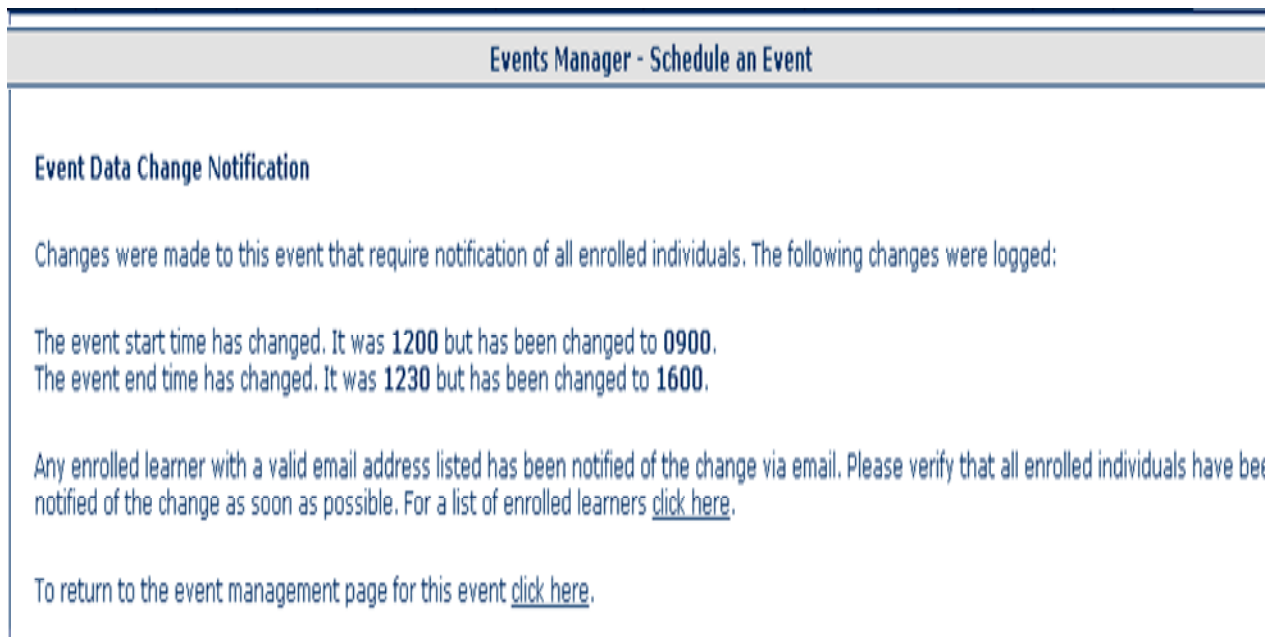
**Note:** If one or more Learners are 'removed' from an Event, the removed Learners are NOT notified automatically by eMail.

**Special Instructions:** Communicates instructional information to the Learners. This information is viewed by the Learners in the eMail confirmation letters that are generated during the enrollment process. Only Learners that have eMail addresses in the system will be sent a registration confirmation.

Click "**Save Event**".

**Tip:** You can now enroll Learners.

# Classes & Events – Schedule a New Event – Data Change Notification



The screenshot shows a web interface titled "Events Manager - Schedule an Event". Below the title bar, there is a section titled "Event Data Change Notification". The text in this section reads: "Changes were made to this event that require notification of all enrolled individuals. The following changes were logged: The event start time has changed. It was 1200 but has been changed to 0900. The event end time has changed. It was 1230 but has been changed to 1600. Any enrolled learner with a valid email address listed has been notified of the change via email. Please verify that all enrolled individuals have been notified of the change as soon as possible. For a list of enrolled learners [click here](#). To return to the event management page for this event [click here](#)."

When changes are made to an event Learners will be notified automatically if an email address has been linked to the Learner. If an email address has not been linked to the Learner, it is up to the Training Instructor to notify event attendees of changes.

# Enrolling Learners in a Classroom Training

Only Training Instructors that are hosting the event are permitted to enroll learners into their own classroom event. The rules for enrolling staff to a Pre-Service classroom based training has not changed, you will need to continue enrolling staff for training through the Lead or Non-Lead Training Instructor for that event as usual.

# Classes & Events – Class/Event Roster

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose-onetwo - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Search

You may select events using any or all of the criteria below. Text searches, for event names and/or course codes, will match all events having the text you enter. For example, entering the letters 'IT' in the course code search field would match all course codes beginning with the letters 'IT'.

You can search for text inside an entry by preceding your criteria with a % (percent sign). Using this, a search for %CPR in the event name field would produce matches for all event names having the letters CPR in them. So, both 'CPR Training' and 'Infant CPR' would be matched.

Searches are not case sensitive, so searches for 'CPR' and 'cpr' produce identical results.

**Enter your Search Criteria:**

Search for event names like:  Search for course codes like:

Use date range: Start Date:  (mm/dd/yyyy) End Date:  (mm/dd/yyyy)

Not Archived  Archived  All

Locate events WHERE classroom.Course.Code like 'sample%'

Color codes: Archived events Cancelled events

Course name	Course Code	Location	Start Date	Start-End Time	Enroll. Begins	Enroll End	# Enrolled
<a href="#">Boggs Center Sample Classroom Template</a>	Sample	Boggs Center Liberty Plaza, 3rd Floor, Room A	3/30/2011	0900 - 1700		3/30/2011	0

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## Select **Classes & Events – Classes & Events – Class/Event Roster**

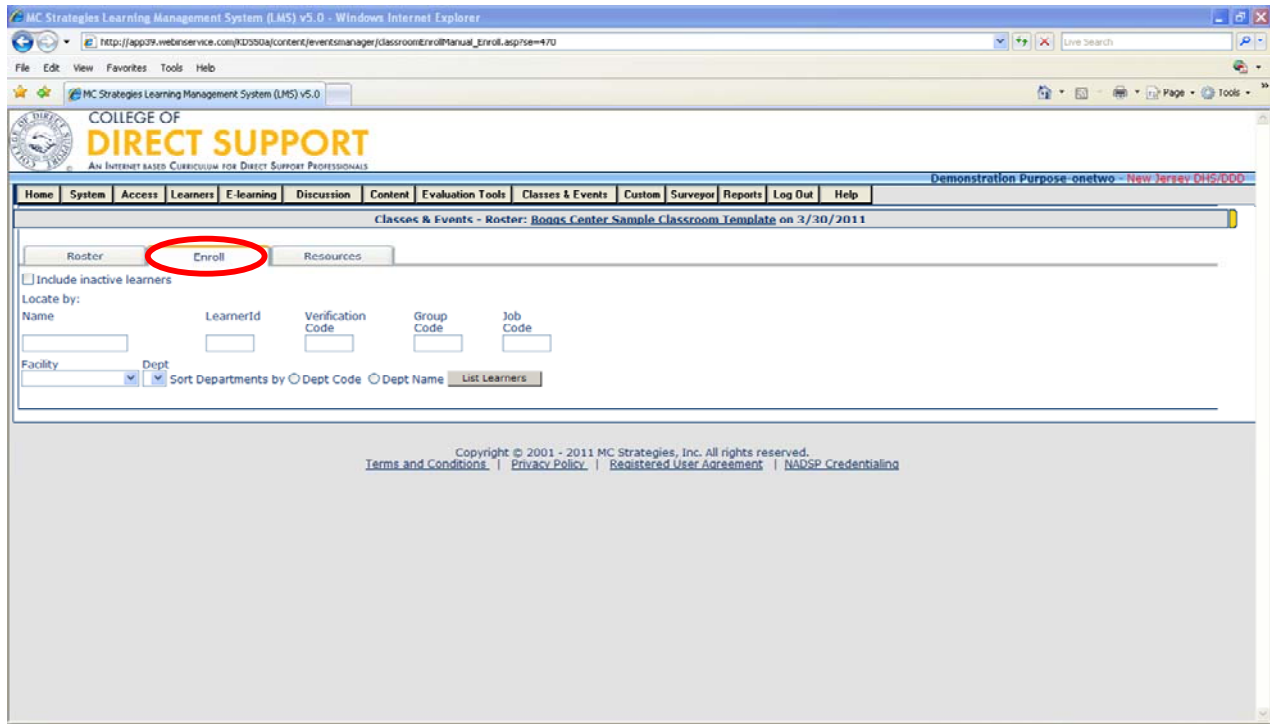
Select an event using any or all of the criteria on the page. Then click the **List** button.

Click the event 'Course name' (shows as a hyper link) that you want to assign a Learner to.

The event page will appear.



# Classes & Events – Class/Event Roster – Enroll Learners



Three tabs display across the top of the Classes & Events – Roster page: Roster, Enroll, & Resources.

Click on the “**Enroll**” tab.

**Note:** The “Roster” contains all currently enrolled Learners in this event. It also tells you the capacity for the event, wait list if available, number canceled, and when the event is completed the number of no-shows.

# Classes & Events – Class/Event Roster – Enroll Learners

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Demonstration Purpose-onetwo - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Roster: Boggs Center Sample Classroom Template on 3/30/2011

Roster **Enroll** Resources

Include inactive learners

Locate by:

Name LearnerId Verification Code Group Code Job Code

example-one

Facility Dept

New Jersey DHS/DDD CDSDemo - Admin Demo

Sort Departments by  Dept Code  Dept Name

Name	LearnerId	Birthdate	Facility Code	Dept.	eMail	Active	Group Code	Position
<input type="checkbox"/> example-one, demo	dexample1111	12/6/1965	01 CDSDemo		yes	yes		12

Enroll Date: 3/9/2011 (mm/dd/yyyy) Payment Method: (if known)

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You can enroll one Learner at a time by searching for a Learner by name or by displaying all Learners by Facility and/or department.

Enter the staff name

Select the Facility: New Jersey DHS/DDD (unless otherwise specified)

Select the department: (name of the agency the staff belong to)

Click **List Learners** button.

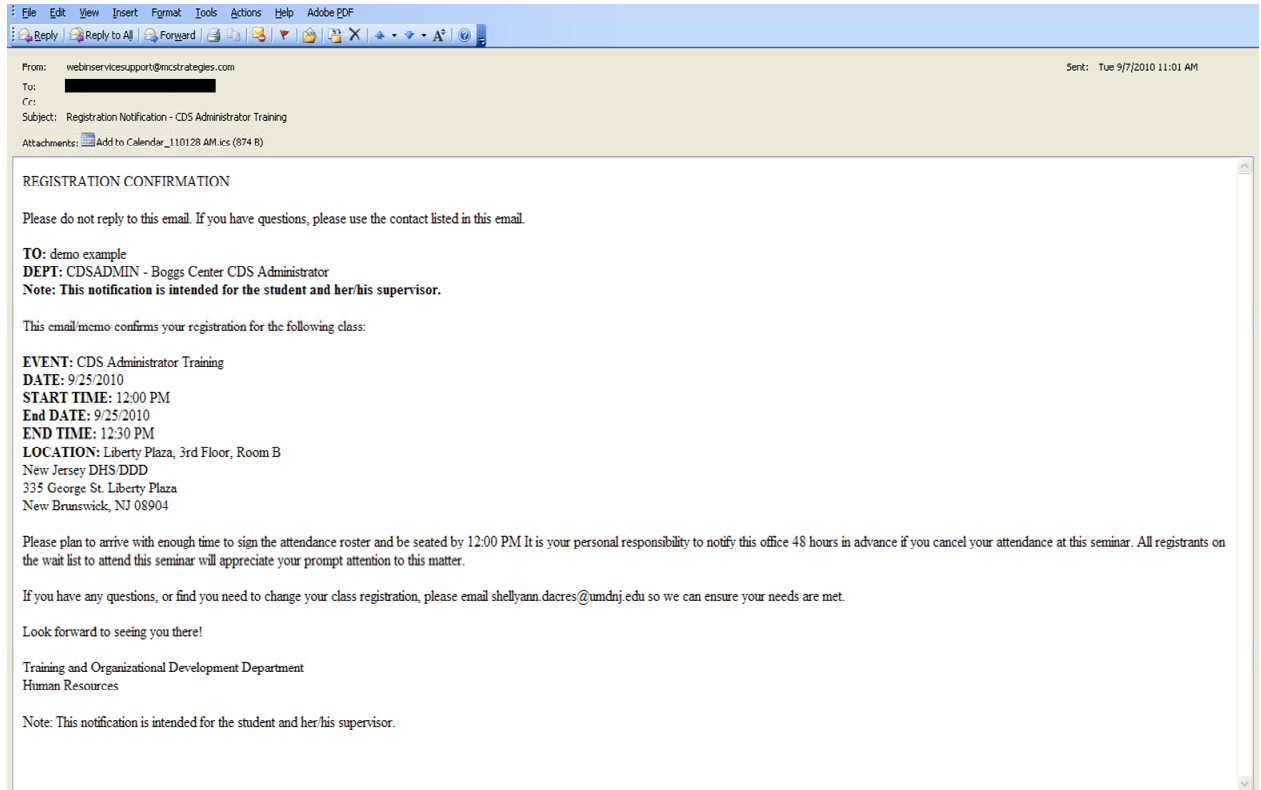
Select the check box to the left of each Learner that you want to enroll.

Click the “**Enroll**” button when have finished choosing learners.

You can click on the Roster tab to confirm that the learner has been enrolled in the class.

**Note:** Only Learners that have email addresses in the system will be sent a **registration confirmation** and an **email reminder** (see next slide).

# Registration Email



The Learner will receive a registration email, once they have been enrolled in a class.

# Classes & Events – Class/Event Roster

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Demonstration Purpose-oneTwo - New Jersey DHS/DDO

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Roster: [Boqqs Center Sample Classroom Template](#) on 3/30/2011, 09:00 AM to 5:00 PM

Roster (circled) | [Enroll](#) | [Resources](#) | [Event Log](#) (circled) | [Email Reminder](#) | [Fix Wait List](#) | [Complete Event](#) | [Email Log](#) | [Refresh](#)

Name	Home Ph#	Dept.	Dept. Ph#	Facility	Enroll Date	Enrolled by	Status	Active
✓ <a href="#">demo_example-one</a>		CSDDemo		01	3/3/2011	Admin	Enrolled	Yes

Capacity 12 Enrolled 1 Complete 0 Wait List 0 Incomplete 0 Cancelled 0 [No-show](#) 0

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**Steps to Open the Event Log** - If you are not already in this window you can access the event log as follows:

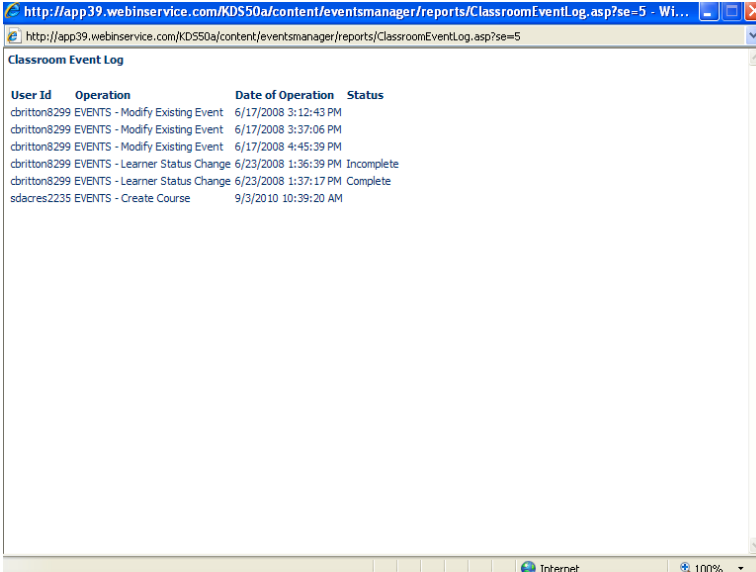
Click **Classes & Events** – Classes & Events – Class Event Roster

**Search** for the Event that you want to open an event log for.

Select the **Course name** link.

Click the **Event Log** button.

# Classes & Events – Schedule New Event – Roster – Event Log



The screenshot shows a web browser window with the URL <http://app39.webservice.com/KDS50a/content/eventsmanager/reports/ClassroomEventLog.asp?se=5>. The page title is "Classroom Event Log". The table below lists several events with columns for User Id, Operation, Date of Operation, and Status.

User Id	Operation	Date of Operation	Status
cbritton8299	EVENTS - Modify Existing Event	6/17/2008 3:12:43 PM	
cbritton8299	EVENTS - Modify Existing Event	6/17/2008 3:37:06 PM	
cbritton8299	EVENTS - Modify Existing Event	6/17/2008 4:45:39 PM	
cbritton8299	EVENTS - Learner Status Change	6/23/2008 1:36:39 PM	Incomplete
cbritton8299	EVENTS - Learner Status Change	6/23/2008 1:37:17 PM	Complete
sdacres2235	EVENTS - Create Course	9/3/2010 10:39:20 AM	

Detailed information on classroom events will be listed including User ID, the operation that was performed, the date of operation and if there was a change in status of the event.

# Classes & Events – Enroll Learners – Roster

The screenshot shows the 'College of Direct Support' web interface. The navigation menu includes Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The current page is titled 'Classes & Events - Roster: Boggs Center Sample Classroom Template on 3/30/2011, 09:00 AM to 5:00 PM'. Below the title are tabs for Roster, Enroll, and Resources. The Roster tab is active, showing a table with columns: Name, Home Ph#, Dept., Dept. Ph#, Facility, Enroll Date, Enrolled by, Status, and Active. A single learner is listed with the name 'demo example-one', status 'Enrolled', and active 'Yes'. Below the table, it shows 'Capacity 12 Enrolled 1 Complete 0 Wait List 0 Incomplete 0 Cancelled 0 No-show 0'. A toolbar above the table includes buttons for Event Log, Email Reminder (circled in red), Fix Wait List, Complete Event, Email Log, and Refresh. At the bottom, there is a copyright notice for MC Strategies, Inc. and links to Terms and Conditions, Privacy Policy, Registered User Agreement, and NADSP Credentialing.

Click the **Roster** tab, and your selected Learners names now list on the 'Roster' tab.

You can view a list of activities by event from your Roster. The list includes the User ID, activity (added a Learner, created and/or modified the event, and so on) and the date and time the activity occurred.

**Tip:** You can use the **Email Reminder** button to remind all enrolled Learners about the scheduled event.

# Classes & Events – Schedule New Event – Roster

The screenshot shows the 'College of Direct Support' web application interface. The page title is 'Classes & Events - Roster: Boqqs Center Sample Classroom Template on 3/30/2011, 09:00 AM to 5:00 PM'. The 'Roster' tab is selected. In the upper right corner of the roster area, the 'Fix Wait List' button is circled in red. Below the buttons is a table with the following data:

Name	Home Ph#	Dept.	Dept. Ph#	Facility	Enroll Date	Enrolled by	Status	Active
✓ demo example-one		CDSDemo		01	3/3/2011	Admin	Enrolled	Yes

Summary statistics: Capacity 12 Enrolled 1 Complete 0 Wait List 0 Incomplete 0 Cancelled 0 No-show 0

## Managing Wait List

As an Administrator you have control over the wait list for events.

Administrators can override the wait list option adding a Learner to an event if the Event is full.

Or an administrator can remove an Enrolled Learner from the Roster and manually add a Learner from the roster.

**If you are not already on the Roster page for your scheduled event:**

Select **Classes & Events — Classes & Events — Class/Event Roster**.

From the Search page, enter the search criteria for the event Roster you want to open.

Click the **List** button on the right.

Click the **name** of the course. The Roster opens.

Click the **Fix Wait List** button in the upper right. Note: The wait list starts when an event enrollment meets the maximum capacity. The next Learner that is enrolled gets added to the wait list and the system generates an email telling the learner they are wait listed.

# Classes & Events – Schedule New Event – Resources

The screenshot shows the 'College of Direct Support' LMS interface. The header includes the college logo and name, along with the tagline 'AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS'. A navigation menu at the top contains links for Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The current page is titled 'Classes & Events - Resources: Boqqs Center Sample Classroom Template on 3/30/2011'. Below the title, there are three tabs: 'Roster', 'Enroll', and 'Resources', with 'Resources' highlighted by a red circle. The 'Resources' section contains four rows of options: 'Mailing Labels', 'Name tags', 'Sign in sheet', and 'Certificates'. Each row has a dropdown menu and a 'Display' button. To the right of these options are radio buttons for 'All', 'Enroll', and 'Completed'. At the bottom of the page, there is a copyright notice: 'Copyright © 2001 - 2011 MC Strategies, Inc. All rights reserved.' and links for 'Terms and Conditions', 'Privacy Policy', 'Registered User Agreement', and 'NADSP Credentialing'.

The LMS comes with default mailing labels, name tags and sign-in sheets; however, you can have your own resources available for your events.

Resources include the following:

Mailing labels (pre-filled information on the mailing label) with several defaults you can select from or have your own customized mailing labels loaded.

Name tags (pre-filled name tags for each Learner) with several defaults you can select from or have your own customized name tags loaded.

Sign-in sheets (pre-filled information on the sign-sheet e.g., Names of Learners) with several defaults you can select from or have your own customized sign-in sheets loaded.

Select the type you want using the drop-down menu then click **“display”**



**\*\*Note:** Although certificates are listed as a resource here, your agency is still required to keep hard copies of all Pre-Service Training certificates. Certificates printed in the system for Pre-Service Trainings will not be accepted as confirmation that a Learner attended Pre-Service training.

# Classes & Events – Schedule New Event – Sign In Sheet

Sign-in Sheet - Windows Internet Explorer

http://app39.webinerservice.com/KD550a/content/eventsmanager/reports/GenericSignIn.asp?se=470

File Edit View Favorites Tools Help

Sign - In

Event: **SAMPLE-Boggs Center Sample Classroom Template**  
Date: 3/30/2011 - 09:00 AM to 05:00 PM  
Location: Boggs Center Liberty Plaza, 3rd Floor, Room A

Name Title	Learner ID	Birth Date	Facility/Dept/Manager	Email	Signature (required)
example-one, demo			01/ Admin Demo/	cdsta@umdnj.edu	

Enrolled 1 Complete 0 Wait List 0 Incomplete 0 Cancelled 0 No-show 0

Done Internet 100%

Sample Sign-in sheet.

# After the Classroom Training (editing Learner status)

**\*\*Note: Only the trainer or their designee shall make changes to the status of the Learner for the classroom training they are scheduled for. Changing the status of a Learner in a training that you did not conduct will result in loss of administrative privileges and other consequences.**

# Classes & Event – Editing Learner Status

COLLEGE OF DIRECT SUPPORT  
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Demonstration Purpose-onetwo - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Roster: Boggs Center Sample Classroom Template on 3/30/2011, 09:00 AM to 5:00 PM

Roster Enroll Resources

Event Log Email Reminder Fix Wait List **Complete Event** Email Log Refresh

Name	Home Ph#	Dept.	Dept. Ph#	Facility	Enroll Date	Enrolled by	Status	Active	
✓ demo example-one		CSDemo		01	3/3/2011	Admin	Enrolled	Yes	<b>Edit</b> Confirm Ltr

Capacity 12 Enrolled 1 Complete 0 Wait List 0 Incomplete 0 Cancelled 0 [No-show](#) 0

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## Updating Learner Status After the Classroom Event

Select **Classes & Events** — **Classes & Events** — **Class/Event Roster**.

From the Search page, enter the search criteria for the event Roster you want to open.

Click the **List** button on the right.

Click the **name** of the course.

The Roster opens.

Find the Learner's name on the left, click the **Edit** button to the right of the Learner's name.

The Edit Online Student Enrollment Record opens for the selected Learner and event.

**Note:** Once the in-classroom training is over, you may change the Learner status info.: enrolled, waiting list, canceled, complete, no show, or incomplete. You could change the status of each individual Learner or edit the status for no show, incomplete or canceled learner first then click “**Complete Event**” which changes all remaining Learners status from Enrolled to Complete (**Should only be clicked when roster is finalized and no shows are removed**). This will make it easier for the trainer to update the Learner status after the classroom event.

**Complete Event** changes all learners status from Enrolled to Complete (**Should only be clicked when roster is finalized and no shows are removed**).

# Classes & Events – Wait List – Edit Learner Status

The Status column displays either “enrolled,” “waiting list,” “cancelled,” “complete,” or “incomplete.”

If a Learner is canceled from a full event, the first person on the wait list is changed to the ‘enroll’ status. However, this automatic assignment will not occur if an administrator cancels a Learner so the administrator can manage the roster and select which Learner(s) should be enrolled.

If the wait list is allowed then when an event meets the maximum capacity the next Learner that tries to enroll gets added to the wait list and the LMS generates an email telling the Learner they are wait listed. The letter does not tell the Learner where they are on the wait list.

Learners are added in the order they are enrolled. If there are 50 learners that get added at once then the attempt to enroll is based on the order of that list. Generally the wait list accumulates one Learner at a time so they are ordered on the date they try to enroll.

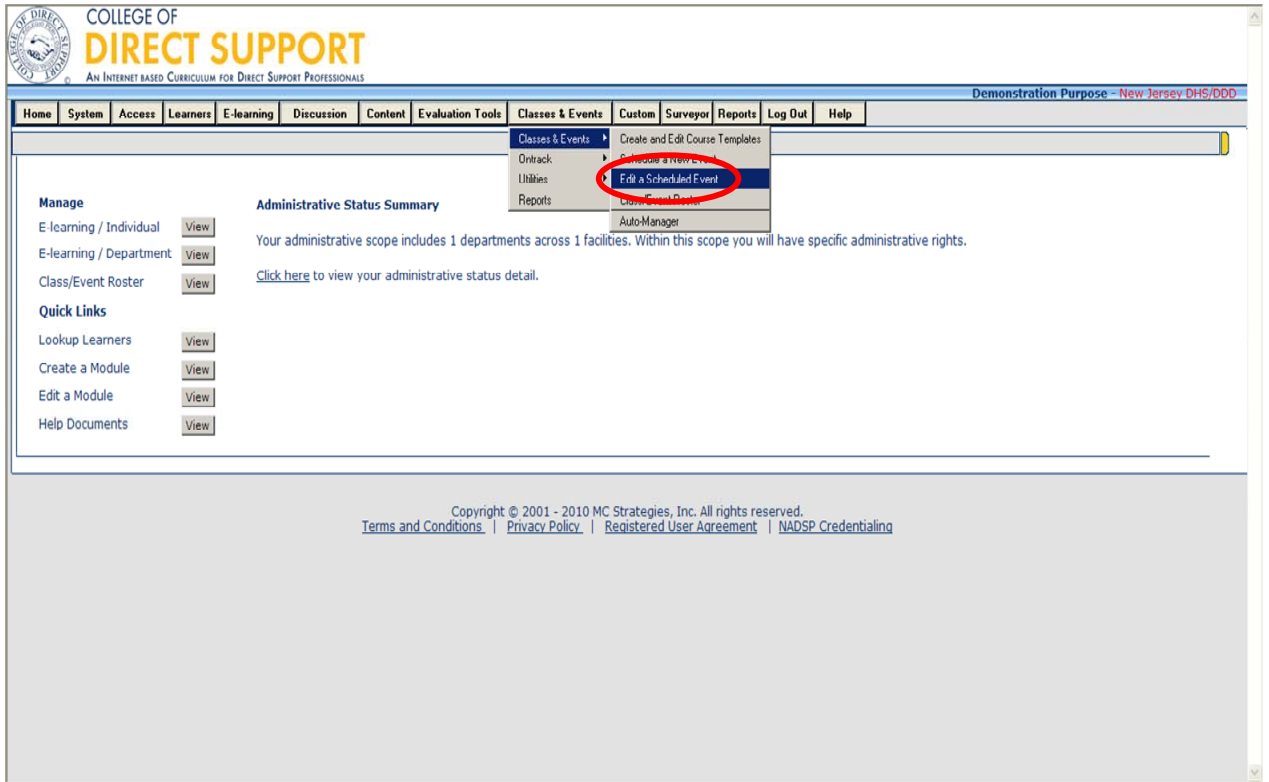
If a Learner cancels and the administrator changes their status to canceled the first person on the wait list gets enrolled and the newly enrolled Learner receives a confirmation email from the system.

If a Learner does not have an email address, it is up to the administrator that added them to notify the Learner about the event. Or if the Learner self enrolls, the Learner sees it in his/her lesson plan and calendar.

# Archiving Events



# Archiving



Events can be archived. As your number of completed events grow you may want to “Archive”.

By archiving completed events, you can easily see events still pending.

Select **Classes & Events – Classes & Events – Edit a Scheduled Event**

# Archiving

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Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Search

You may select events using any or all of the criteria below. Text searches, for event names and/or course codes, will match all events having the text you enter. For example, entering the letters 'IT' in the course code search field would match all course codes beginning with the letters 'IT'.

You can search for text inside an entry by preceding your criteria with a % (percent sign). Using this, a search for %CPR in the event name field would produce matches for all event names having the letters CPR in them. So, both 'CPR Training' and 'Infant CPR' would be matched.

Searches are not case-sensitive, so searches for 'CPR' and 'cpr' produce identical results.

Enter your Search Criteria:

Search for event names like: becoming Search for course codes like:

Use date range: Start Date:  (mm/dd/yyyy) End Date:  (mm/dd/yyyy)

Not Archived  Archived  All

Locate events WHERE classroomCourse.CourseName like 'becoming%'

Color codes: **Archived events** **Cancelled events**

CourseName	Course Code	Location	Start Date	Start-End Time	Enroll. Begins	Enroll End	# Enrolled
<a href="#">Becoming an Effective Mentor</a>	Mentor101	Liberty Plaza, 3rd Floor, Room B	10/4/2007	0930 - 1530		10/4/2007	1
<a href="#">Becoming an Effective Mentor</a>	Mentor101	Liberty Plaza, 3rd Floor, Room B	10/8/2007	0930 - 1530		10/8/2007	0
<a href="#">Becoming an Effective Mentor</a>	Mentor101	Liberty Plaza, 3rd Floor, Room B	11/5/2007	1200 - 1230		11/5/2007	0
<a href="#">Becoming an Effective Mentor</a>	Mentor101	Liberty Plaza, 3rd Floor, Room B	6/30/2008	0900 - 1600	6/15/2008	6/30/2008	1
<a href="#">Becoming an Effective Mentor</a>	Mentor101	Liberty Plaza, 3rd Floor, Room B	9/1/2010	1200 - 1230		9/1/2010	0

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You can search for events in multiple ways:

“Search for event names like” – you can put the event name in part or all

“Use date range” – enter a start and/or end date

Then choose if you want to see events that have not been archived, or all events.

Click “**List**”. Then click on the event hyperlink you want to archive.

# Archiving

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Demonstration Purpose - New Jersey DHS/ODD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Classes & Events - Schedule

View Course Create New Event Edit Existing Event Save Event

Event Name: **Mentor101 - Becoming an Effective Mentor**

Course Information

This event is Active Created: 4/2/2008 1:34:30 PM

Enroll Learners **Archive Event**

Start Date: 10/4/2007 (m/d/yy) End Date: 10/5/2007 (m/d/yy)

Start Time: 09:30 AM End Time: 03:30 PM

Please Note selecting a location for this event does NOT confirm its availability. Please follow standard procedures for reserving this room/area.

Location: Liberty Plaza, 3rd Floor, Room B Select a Location

Description: This training will help Mentors participating in NJ's Career Path for Direct Support Professionals understand their role as a coach and a role model.

Objectives: To understand the Career Path To demonstrate the use of effective communication, feedback, listening and goal setting.

Notes:

Addl. Materials:

Sessions: 2

Capacity: 55 Min. Capacity:

Nurse Planner: eMail: Phone:

Contact: Colleen McLaughlin eMail: colleen.mclaughlin@ Phone:

Event Type: Classroom Training Host Facility: New Jersey DHS/ODD

Allow self-enrollment

Instructor & Credits

The event details will appear, then click the “**Archive Event**” button in the upper right

Click “**OK**”. The message “This event is Archived” displays in the upper left.

When you search for events, all archived events display in orange.

**Tip:** To remove an Event from the archives, search and open the Event, then click the Activate Event button on the right.

# **Running Reports on Classroom Trainings**

# Classes & Events – Reports

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Classes & Events  
Ontrack  
Utilities  
**Reports**

**Manage**

E-learning / Individual

E-learning / Department

Class/Event Roster

**Quick Links**

Lookup Learners

Create a Module

Edit a Module

Help Documents

**Administrative Status Summary**

Your administrative scope includes 1 departments across 1 facilities. Within this scope you will have specific administrative rights.

[Click here](#) to view your administrative status detail.

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Event Manager is designed to schedule and maximize your classroom training including classrooms, personnel (Learners and Instructors), needed resources, fees and discounts. It automatically sends your eMail enrollment confirmations and alerts you to any conflicts. The Event Manager ties all your LMS classroom training together online.

There are several event and Learner reports you can use to better understand the successes of your training plans as well as keep you informed of outcomes.

Select **Classes & Events — Reports**.

# Classes & Events – Reports – Course Reports

Course	Event	Learner
<a href="#">Course Listing (all)</a>	<a href="#">Event Listing (select)</a>	<a href="#">Employee Transcript</a>
<a href="#">Course Listing (select)</a>	<a href="#">Event Enrollment Detail</a>	<a href="#">Payment Status - (online)</a>
<a href="#">Course Listing (CE Only)</a>	<a href="#">Event CE Summary</a>	<a href="#">Payment Status - (print)</a>
	<a href="#">Event No Show Listing</a>	<a href="#">No-show Listing</a>
	<a href="#">Event Attendance Listing</a>	
	<a href="#">Instructor Info</a>	
	<a href="#">Department Completed Learners</a>	
	<a href="#">Department Enrolled Learners</a>	
	<a href="#">Classroom Training by Dept.</a>	

Notice that Reports are listed in three basic categories: **Course**, **Event** and **Learner**.

## **Course Reports:**

**Course Listing (all)** – All courses display summary and detail information regarding courses that have been created on the site.

**Course Listing (select)** – Only the courses you search for display summary and detail information regarding courses that have been created on the site.

**Course Listing (CEU Only)** – Only CEU courses display summary and detail information.

# Sample – Course Listing All

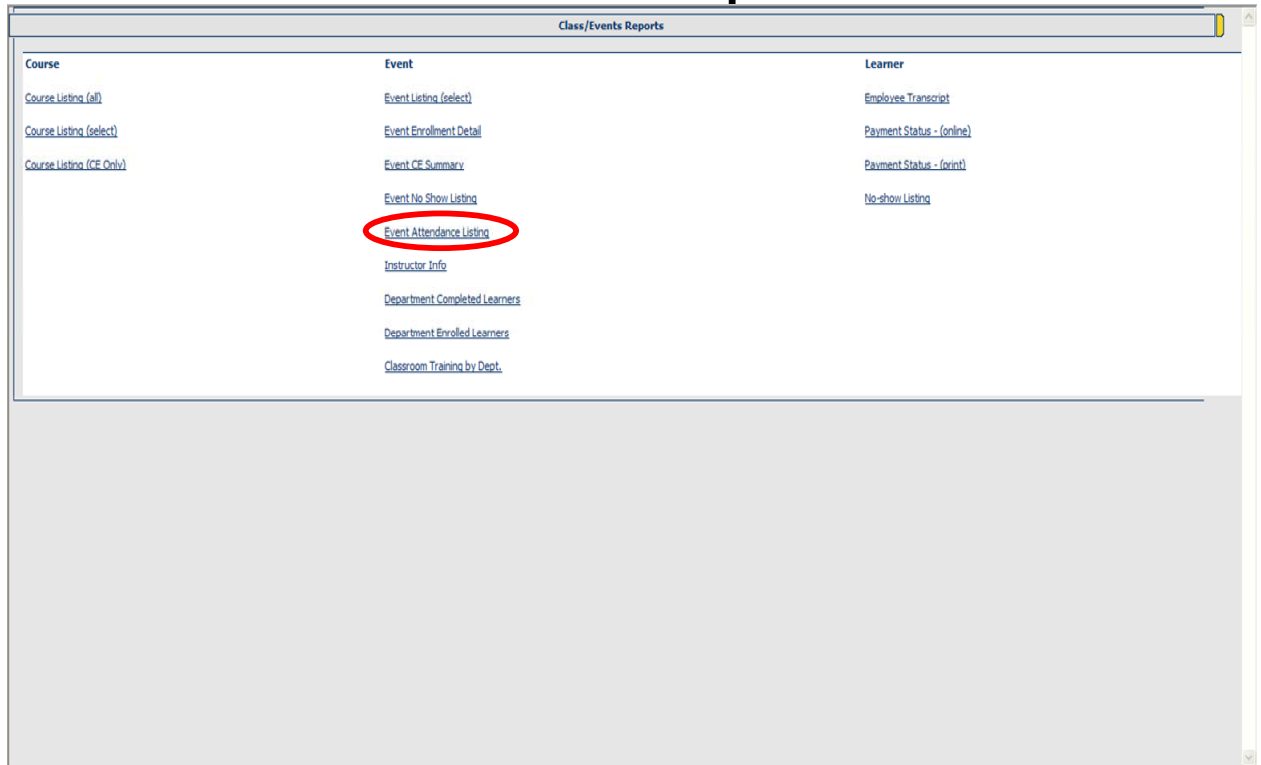


The screenshot shows a table titled "Master Course Listing" with the following data:

Course code	Course name	Max. Cap.	Sessions	Event Type	Nurse Planner
Mentor 101	Becoming an Effective Mentor	55	2	Classroom Training	
BM101	Behavior Management		2	Classroom Training	
CDS Admin	CDS Administrator Training	15	1	Classroom Training	
OVERVIEW	Overview of Developmental Disabilities		1	Classroom Training	
Pre-Service	Pre-Service - Overview		1	Classroom Training	
PSFA	Pre-Service First Aid	25	1	Classroom Training	
TEST	Test For PreService Enrollment		1	Classroom Training	

Detailed information on each course offered will appear. Click on the course you would like to run the report on and a new window will open with the report results.

# Classes & Events – Reports – Events Reports



## **Event Reports:**

**Event listing (select)** - Only events you search for display and show detailed information regarding specific events that have been created.

**Event Enrollment Detail** - This report provides a list of Learners that are enrolled into specific events.

**Event CEU Summary** – Displays events marked as having CEU hours.

**Event Attendance Listing** - Allows administrators to see a date range of Learners that have completed an event, are incomplete, or are marked as a no-show for events.

**Instructor Info** - Provides information about which events instructors have taught.

**Department Completed Learners** - Provides information on completed Learners for events within a date range, or all results.

**Department Enrolled Learners** - Provides information on enrolled Learners for specific events or all events.

**Classroom Training by Dept** - Provides information about cost center by all Learners for a department within a facility.



# Classes & Events – Reports – Events Attendance Listing

The screenshot shows a web application titled "Welcome to the Course Attendance Manager". It contains several sections for user input:

- Facility Selection:** "Please select the Facility for which you would like to generate an attendance report" with a dropdown menu showing "New Jersey DHS/DDD".
- Department Selection:** "Please select the department for which you would like to generate an attendance report" with a dropdown menu showing "Level 3 Mental Health Supports Workgroup - MHSWG".
- Course Selection:** "Please select the course listing for which you would like to generate an attendance report" with two radio buttons: "Course Code:" (selected) with a dropdown showing "BM101", and "Or Course Name" with a dropdown showing "Behavior Management".
- Criteria Selection:** "Please select the criteria" with two radio buttons: "Learners by current facilityCode and department" (selected) and "Learners by Facilitycode and department at the time of the event".
- Date Range:** "Please enter a date range for the report:" with "Start Query Date:" (09/01/2010) and "End Query Date:" (09/07/2010) fields, each with a calendar icon.
- Archival Status:** Radio buttons for "Not Archived", "Archived", and "All" (selected).
- Buttons:** "Click here to generate report ->" followed by "Generate Report" and "Reset" buttons.

At the bottom right, there is a small copyright notice: "Copyright - 2004 | Webservice".

## Event Attendance Listing

Choose a **course** from the dropdown Course List

Select a **facility** from the Facility List

Choose a **department** from the dropdown list

Choose **List learners by Current Facility Code and Department** or **Learners by Facility Code and Department at the time of the event.**

Choose **Date Range**

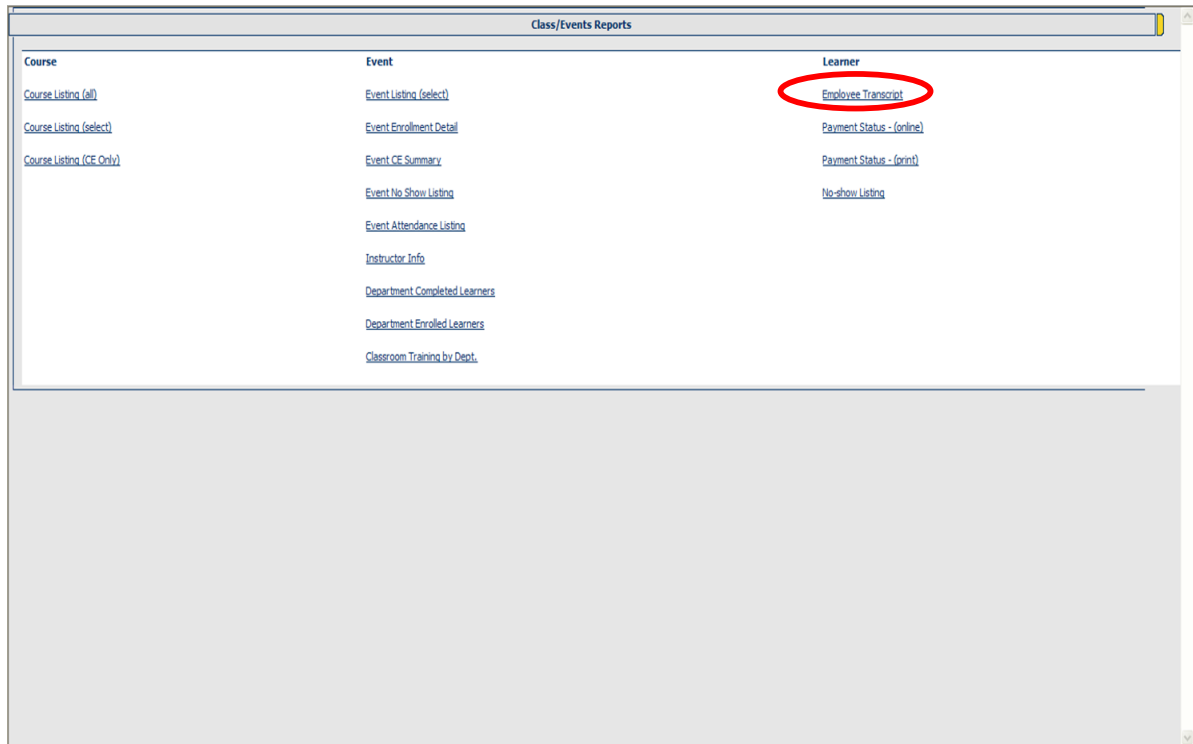
Click **Generate Report**

This will give the totals of learners for the criteria selected that Completed the course, are still incomplete or were no shows. The Totals are clickable Hyperlinks that will take you to a list of the learners.

# Classes & Events – Reports – Attendance Manager

The screenshot displays a web interface for a 'Course Attendance Report'. At the top left, there is a 'Home' link. Below it, a yellow banner shows 'Course Name: Behavior Management | Course Code: BM101'. A black banner with white text reads 'Course Attendance Report' and 'New Jersey DHS/DDD'. The report period is '09/01/2010 through 09/07/2010'. The main content area lists four categories, all with a count of 0: '0 Users completed the course', '0 Users still remain incomplete', '0 Users were no shows', and '0 Users canceled'. At the bottom center, it says 'Copyright - 2004 | Webservice'.

# Classes & Events – Reports – Learner Reports



## Learner Reports:

**Employee Transcript** - Provides information about events that individual Learners are enrolled into or have completed.

**Payment Status Reports** - Provides information on charges that are due for events that have a related cost associated with them.

**No show Listing** - Allows an administrator to see all the no shows that have been identified from completed events.

Click the report you would like to review.

To close a report and return to the list of Reports, click the **Back** button on your browser.

# Employee Transcript

**Lookup Learner**

To locate a learner:

1. Enter all or part of their last name in the **Search** box below
2. Click **Search**
3. Select the name of the learner from the list that is displayed
4. Click **Select Learner**

The list displays ALL learners, both active (A) and inactive (I), with active learners displayed first.

Search by Last Name:

**Search Results for example**

Select a learner from the list:

- example, demo- CDSADMIN (A)
- example, demo- CDSADMIN (A)
- example, demo- CDSADMIN (A)

Another way to Look up Learner.

Type in Learner name, then click **“Search”**

Select Learner from list then click **“Select Learner”**.

The Learner transcript will appear.

# Sample Employee Transcript

Employee Transcript

For: demo example  
Verification code:  
UID: de:example1111

To show a transcript of completed events only, check the box to the right and click **Show**  **Show**

Course Code	Course name	Start/End	Time	Enroll	Status	Contact Hours	CE/Provider
<a href="#">CDS Admin</a>	<a href="#">CDS Administrator Training</a>	9/25/2010	12:00 PM - 12:30 PM	Assigned	Complete	4.00 hours	0.00 hours
<a href="#">PSFA</a>	<a href="#">Pre-Service First Aid</a>	9/30/2010	08:00 AM - 04:00 PM	Assigned	Enrolled	0.00 hours	0.00 hours

# Ontrack (historical data and certifications)

OnTrack will be used to enter historical training information for staff and manage recurring requirements for training and licensing such as CPR and First Aid certification.

**\*After a training, the instructor/trainer will change the learner status for the event, then enter CPR and First Aid information into Ontrack if it applies. The system will remind the learner 15 days before the expiration date that they are approaching the end of their certification time.**

**If you are the home agency for your staff you must use Ontrack to enter the following Pre-Service information:**

**The original dates for Overview of DD, Abuse & Neglect and Medication.**

**The most recent dates for CPR and First Aid**

# Entering Information Into Ontrack

There are two types of enrollment: learner enrollment and item enrollment.

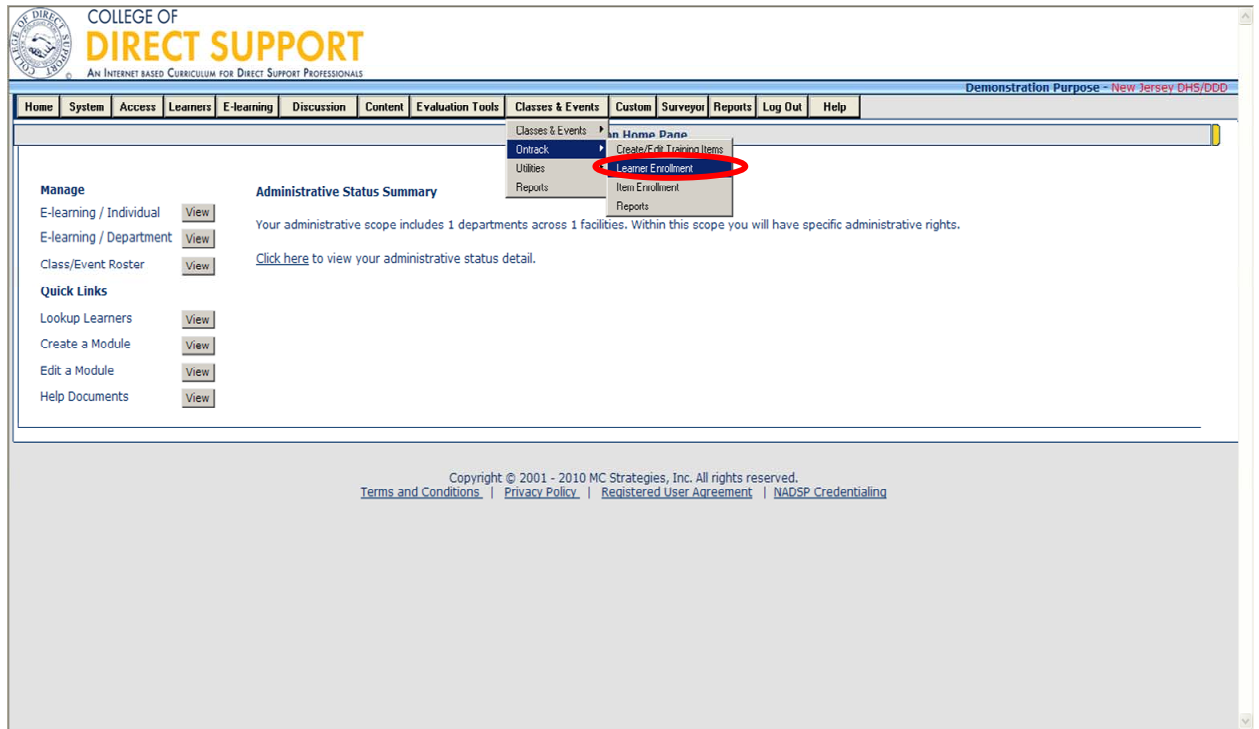
Learner enrollment enrolls and schedules one learner at-a-time.

Item enrollment enrolls and schedules multiple learners simultaneously.

# Ontrack: Steps to Enroll and Schedule One Learner At-a-Time



# Classes & Events – Ontrack – Learner Enrollment



## **Steps to Enroll and Schedule Items by Learner Enrollment (one learner at-a-time)**

Enroll and schedule one learner at-a-time to a non-classroom item.

From the menu bar, select **Classes & Events — OnTrack — Learner Enrollment**.

# Classes & Events – Ontrack – Learner Enrollment

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Ontrack - Learner Enrollment

Search by :  Last Name  Learner Id  Group Code  Job Code

example  Select learner:

example-eight, demo- CDSDemo  
Example-eighteen, Demo- CDSDemo  
Example-eleven, demo- CDSDemo  
Example-fifteen, Demo- CDSDemo  
Example-five, Demo- CDSDemo  
example-four, demo- CDSdemo  
Example-fourteen, Demo- CDSDemo  
example-nine, demo- CDSdemo  
example-nineteen, demo- CDSdemo  
example-one, demo- CDSdemo  
example-seven, demo- CDSdemo  
Example-seventeen, Demo- CDSdemo  
example-six, demo- CDSdemo  
Example-sixteen, Demo- CDSdemo  
example-ten, demo- CDSdemo  
example-thirteen, demo- CDSdemo  
Example-three, Demo- CDSdemo  
example-twelve, demo- CDSdemo  
example-two, demo- CDSdemo

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Select the radio button for how you want to search for a Learner: **Last Name**, **Learner Id**, **Group Code**, or **Job Code**.

Enter your selection in the text box (e.g., learner’s last name).

Click the “**Search**” button or press the ENTER button on your keyboard. One or more Learners display on the right in a drop-down.

From the “**Select learner**” drop-down search results on the right, select the Learner from the drop-down and click “**Select Learner**” button.

# Classes & Events – Ontrack – Learner Enrollment

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Ontrack - Learner Enrollment - demo example-one

Search by :  Last Name  Learner Id  Group Code  Job Code

example Search Select learner: example-one, demo, CSDemo Select Learner

Training Item: Filter Add to Learner

There is 1 hidden item for this learner.  Show hidden items Refresh

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From the **Training Item** drop-down, select an enrollment item to assign the selected Learner.

The training items are listed alphabetically in the drop-down.

Pre-Service – CPR

Pre-Service – First Aid

Pre-Service – Medication

Pre-Service – Overview of Developmental Disabilities

Pre-Service – Abuse and Neglect

Highlight the training item you which to apply to the learner.

Click the **Add to Learner** button to assign the selected item to the selected learner. The selected item is added to the list of Ontrack items for this one Learner.

# Classes & Events – Ontrack – Learner Enrollment

The screenshot shows the 'Ontrack - Learner Enrollment - demo example-one' page. At the top, there is a navigation menu with options like Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. Below the menu, there is a search section with radio buttons for 'Last Name', 'Learner Id', 'Group Code', and 'Job Code'. A search box contains 'example', and a 'Select learner' dropdown shows 'example-one, demo- CDSdemo'. Below this, there is a 'Training Item' dropdown and an 'Add to Learner' button. A message states 'There is 1 hidden item for this learner.' with a 'Show hidden items' checkbox and a 'Refresh' button. The main table displays the following data:

Name	Due	Completed	Comp.	Score	Contact Hours	CE Hours		
<a href="#">Pre-Service - CPR Certification</a>			No		6		Remove	Hide

At the bottom of the page, there is a copyright notice: 'Copyright © 2001 - 2011 MC Strategies, Inc. All rights reserved.' and links for 'Terms and Conditions', 'Privacy Policy', 'Registered User Agreement', and 'NADSP Credentialing'.

The Learner’s enrollment page redisplay with the Due date and a “Comp” completed, marked as NO.

In the example above, the Ontrack item “Pre-Service – CPR Certification” was added to Learner – demo example.

Click the name of the new item (displayed as a hyperlink).

A pop-up box opens for dates and other miscellaneous information displays.

# Classes & Events – Ontrack – Learner Enrollment

The screenshot shows a web browser window titled "Pre-Service - CPR Certification - Windows Internet Explorer". The address bar shows the URL: <http://app39.webinservice.com/KD550a/content/trainingminder/minderEditItem.asp?se=17>. The page content includes a header "Learner: demo example-one" and a form with the following fields:

- Scheduled Date: 5/25/10
- Complete Date: 5/25/10
- Completed:
- Score:
- Contact Hours: 6
- CE Hours:
- Notes:

At the bottom of the form, there are two buttons: "Save" and "Close Window". Both buttons are circled in red in the image.

Enter the following information as needed.

**Scheduled Date:** Enter the date the item is scheduled to be completed.

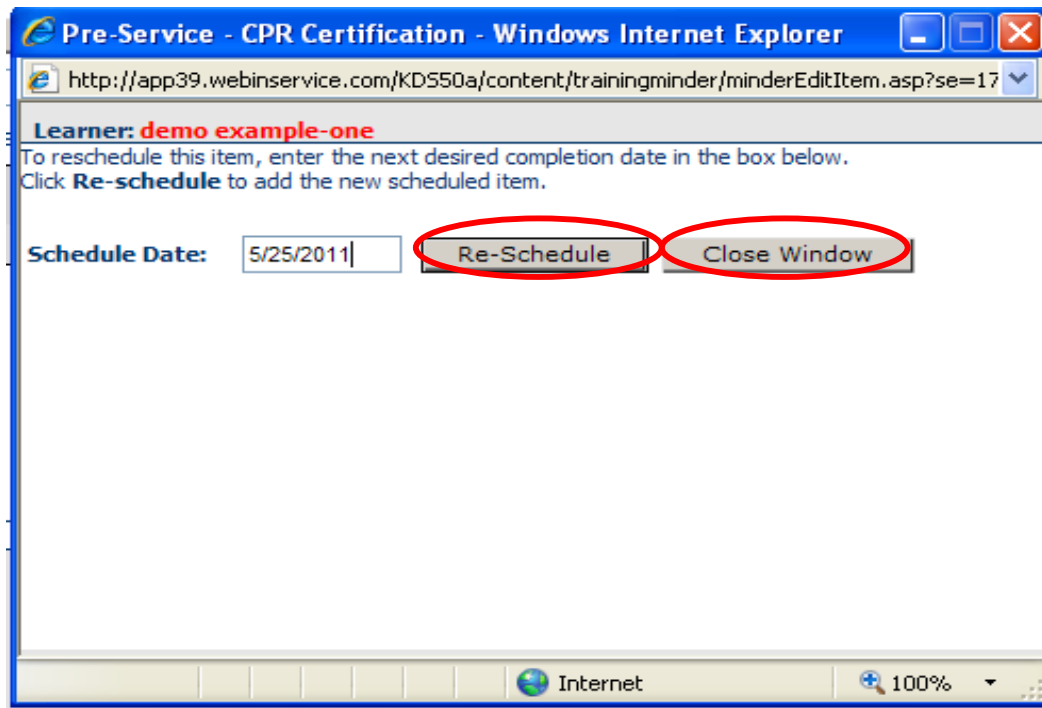
**Complete Date:** Enter the date the item was completed on.

Check the “**Completed**” box.

Optional. Add **Notes**.

Click the “**Save**” button. A new pop-up window will appear with a reschedule date (check the date and adjust if needed). If a reschedule date is not required click “Close Window” in the new pop-up window.

# Classes & Events – Ontrack



The “**Reschedule**” popup window opens. If a reschedule date is not required click “Close Window” in the new pop-up window.

Enter a new “**Schedule Date**” for the item (this date is the end of the certification period).

Click the “**Reschedule**” button. The scheduled/complete pop redisplay

Click the “**Close Window**” button.

Note: You must click “Close Window” to allow the page to refresh with the new information. If you “X” out of the pop-up window, the new information will not be added to the learner.

# Classes & Events - Ontrack

The screenshot displays the 'Ontrack - Learner Enrollment - demo example-one' page. At the top, there is a navigation menu with options: Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. Below the menu, there is a search section with radio buttons for 'Last Name', 'Learner Id', 'Group Code', and 'Job Code', and a 'Search' button. A 'Training Item' dropdown menu is set to 'Pre-Service - CPR Certification', with 'Filter' and 'Add to Learner' buttons. Below this, a message states 'There is 1 hidden item for this learner.' with a 'Show hidden items' checkbox and a 'Refresh' button. The main content area features a table with the following data:

Item Name	Due	Completed	Comp. Score	Contact Hours	CE Hours	
Pre-Service - CPR Certification	5/25/2010	5/25/2010	Yes	6	6	Hide
Pre-Service - CPR Certification	5/25/2011		No	6	6	Remove Hide

At the bottom of the page, there is a copyright notice: 'Copyright © 2001 - 2011 MC Strategies, Inc. All rights reserved.' and links for 'Terms and Conditions', 'Privacy Policy', 'Registered User Agreement', and 'NADSP Credentialing'.

The completed date displays along with the repeat of the item with a new due date.

The example shown above has Pre-Service CPR Certification shown with the completed date and repeats with the recertification date (new due date) of one year later.

**Note:** When the learner attends a re-certification training, the trainer will look up the learner and from the item list click the item name and complete the information required for the learner (new complete date, mark the learner as complete, then add a re-schedule date).

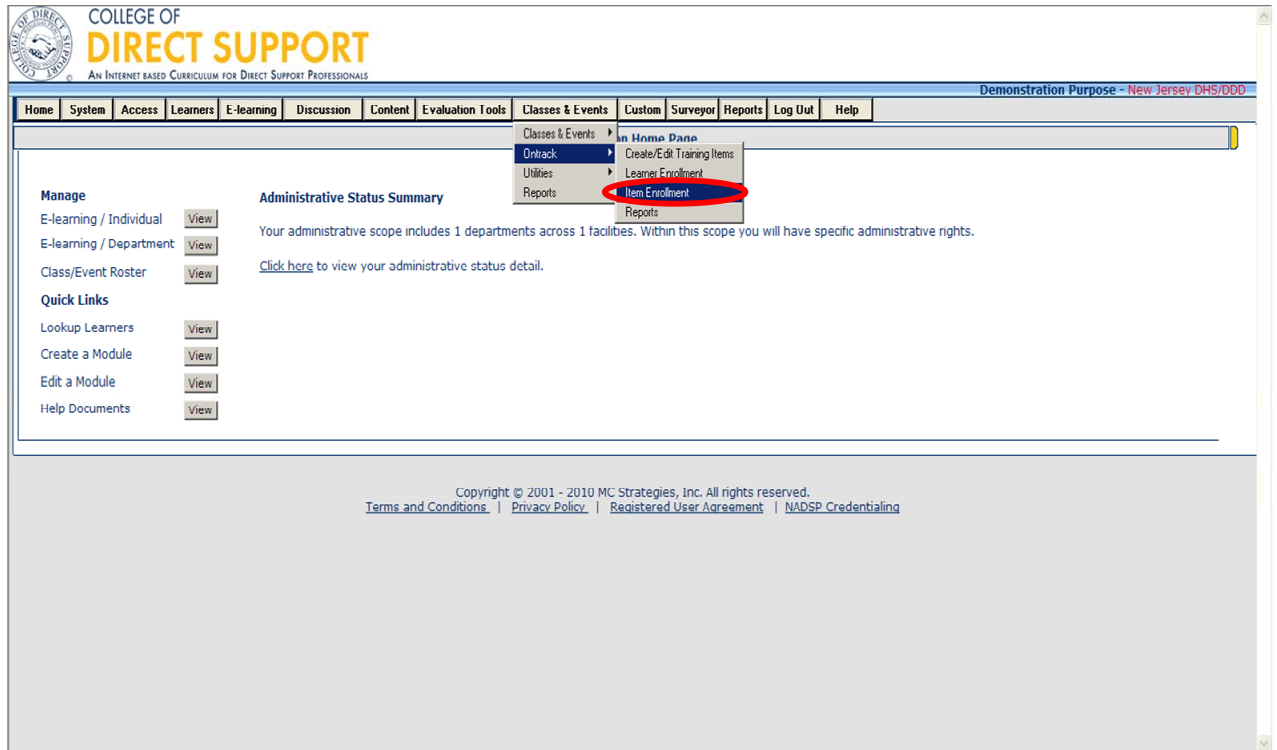
**Note:** Once a learner has been marked as complete the option to remove the item from the learner record is no longer available.

**Note:** To confirm enrollment, look up learner then review transcript.

# Ontrack: Steps to Enroll and Schedule an Item for Multiple Learners



# Classes & Events – Ontrack – Item Enrollment



**Enroll and schedule items to multiple Learners by facility, department and/or position.**

From the menu bar, select **Classes & Events — OnTrack — Item Enrollment**.

# Classes & Events – Ontrack – Item Enrollment

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Ontrack - Training Item Enrollment

Training Item: [dropdown] [Filter]

Start Date: [calendar icon] (mm/dd/yyyy) End Date: [calendar icon] (mm/dd/yyyy)

Select

Add Learners to Item

Re-Schedule Date: [calendar icon] (mm/dd/yyyy) Reschedule Selected

Save Changes Remove Selected

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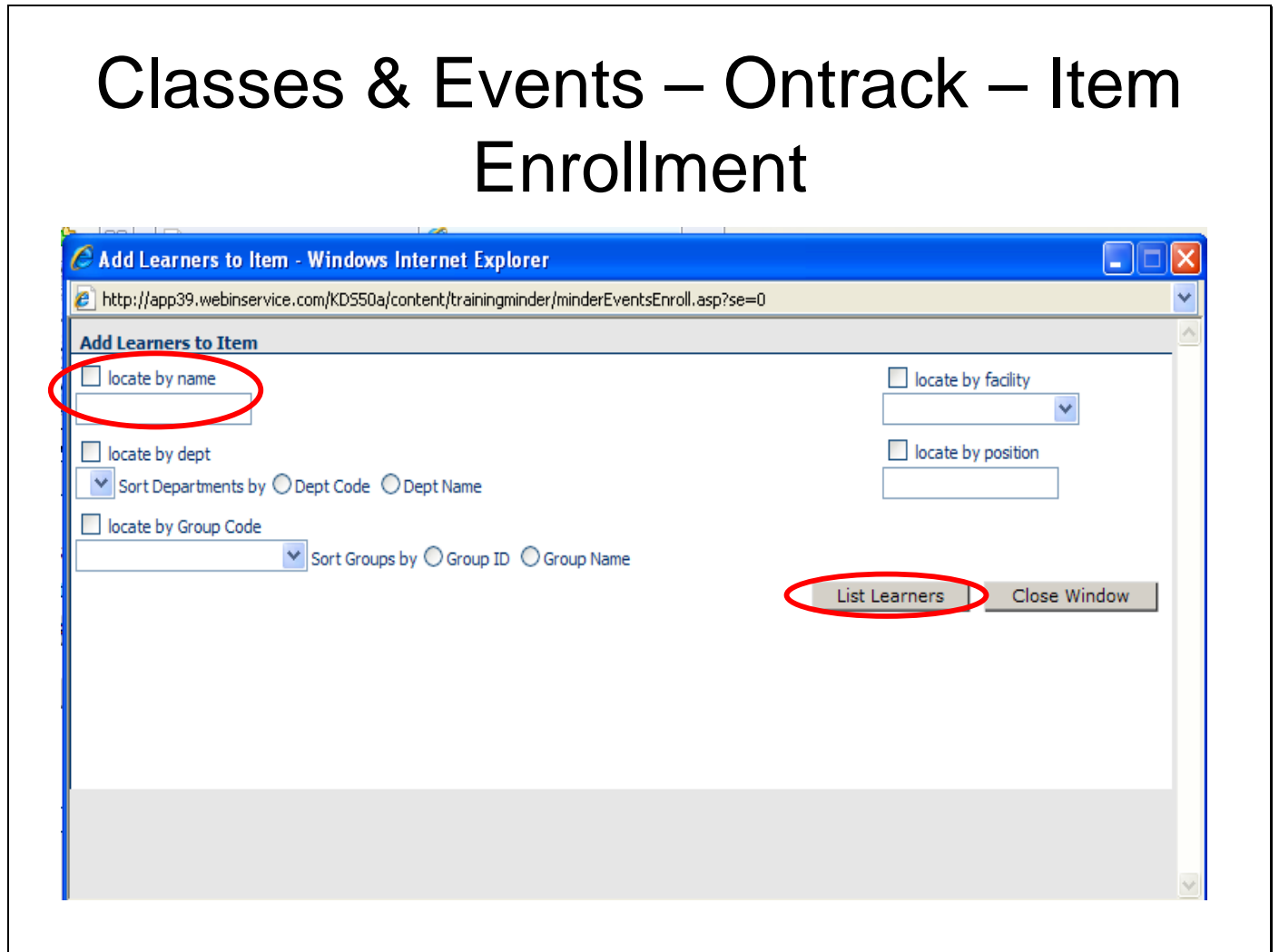
From the Training Item drop-down, select the Item you want to assign. You may use the Filter Item to refine the list of Items in the drop down. The Filter searches on the first word in the item name.

**Note:** If you want to find a specific item and you know the date of the training, enter the date to narrow your search. You must use both the **Start Date** and **End Date**.

Click the “**Add Learner’s to Item**” button.

The ‘Add Learners to Item’ pop-up window appears.

# Classes & Events – Ontrack – Item Enrollment



Select the checkbox from the following: 'locate by name', locate by Facility' locate by dept', 'locate by position' and/or 'locate by Group Code'. The more selections you make the more narrow you search results.

### **Search for your learner:**

'**locate by name**', if you search using a 'Last Name', you can search with a complete or partial name.

'**locate by learner id**', search by learner id

'**locate by facility**', use the drop-down to select the facility for the Learner, then you can select locates by 'Department', 'Group', and/or 'Position'.

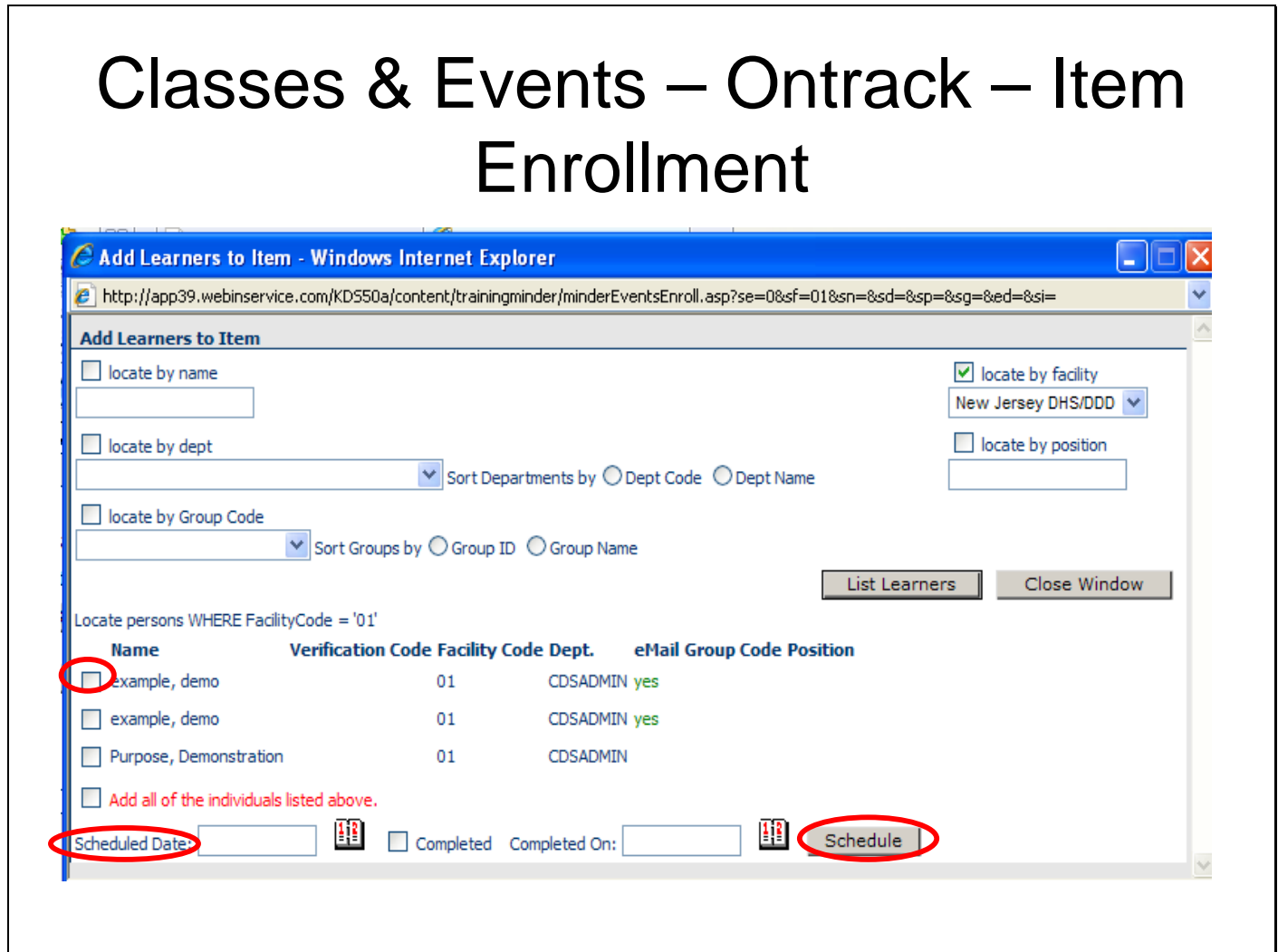
**'locate by dept'**: First select the facility. Select the checkbox for 'locate by dept' and then select to sort the drop-down by either 'Dept Code' or 'Dept Name'. Finally, use the drop-down to select a department.

**'locate by position'**: First select the facility for the department. Select the checkbox for 'locate by position' and then enter the name of the position.

Click the "**List Learners**" button on the lower right.

A list of Learners displays below.

# Classes & Events – Ontrack – Item Enrollment



From the list of learners, **select each learner by checkbox** you want to add to the Item.

**Tip:** If you want to select the entire list of Learner's, scroll to the bottom of the screen and select "Add all the Individuals listed above" checkbox.

To schedule the date of the item, scroll to the bottom of the list of learners.

Schedule the training. Click the calendar and select a '**Scheduled Date**' for the item, mark as '**Complete**' in the check box, then enter the '**Complete Date**'.

Click the "**Schedule**" button on the bottom right of the page. The pop-up window refreshes allowing you to add additional Learners; or you can close the window to return to the item.

**Tip:** Once you save an enrollment to an item, you can continue to add additional enrollments from other Facilities and Departments.

# Item Enrollment – Reschedule date

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Ontrack - Training Item Enrollment

Training Item: [dropdown] [Filter]

Start Date: [calendar] (mm/dd/yyyy) End Date: [calendar] (mm/dd/yyyy)

Select

Add Learners to Item

Re-Schedule Date: [calendar] (mm/dd/yyyy) Reschedule Selected

Save Changes Remove Selected

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Once you close the pop up window the page will refresh and you can also choose a reschedule date (only Learners marked as complete will be rescheduled).

Enter a reschedule date then click **“Reschedule Selected”**

## **OR**

If all learners assigned to the item displays

Click each box next to the learners you want to reschedule, from reschedule date enter a date, click **“reschedule selected”** then confirm by clicking **“Ok”**.

**Note:** To confirm enrollment, look up learner then review transcript.

# Ontrack: Removing Items from Learners

Sometimes not all the items a Learner is enrolled in are needed. When this happens you can remove Learners from an item as long as they have not been marked as completed.

**Note:** You can **remove** the item from this list; but once removed; it will be gone and not show up on any reports. Instead, you can select to **Hide** an item and then redisplay it as needed.

# Ontrack: Removing a Single Learner from an Item

If you have only one Learner to remove from an item, the easiest way is to use 'Learner Enrollment'. Generally if you have multiple Learners to remove from an item, the easiest way is to use 'Item Enrollment'.



# Removing Learner

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Demonstration Purpose - New Jersey DHS/DDD

Ontrack - Learner Enrollment - demo example

Search by :  Last Name  Learner Id  Group Code  Job Code

example Search Select learner: example, demo-CDSADMIN Select Learner

Training Item: [dropdown] Filter Add to Learner

There are no hidden items for this learner.

Item Name	Due	Completed	Comp.	Score	Contact Hours	CE Hours
CPR Certification	9/2/2010	9/2/2010	Yes	98.00	6	Hide

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## Steps to Remove a Single Learner from an Item

From the menu bar, select **Classes & Events — Ontrack — Learner Enrollment**.

**Search for the individual Learner** that you want to remove items from.

Select the radio button for how you want to search for a Learner: **Last Name, Learner Id, Group Code** or **Job Code**.

Enter your selection in the text box (e.g., Learner's last name).

Click the **Search** button (or press the ENTER button on your keyboard).

One or more Learners display on the right in a drop-down.

From the "Select learner" drop-down search results on the right, **select the Learner** from the drop-down.

Click **Select Learner** button.

Click the **Remove** button to the right of the 'Item's Name'.

**Note:** Any item that is not marked as completed, displays a 'Remove' button to its right. You can only remove a Learner from an item if the item is not marked 'Completed'.

**Note:** Notice that in this example, the Ontrack item has already been marked as complete and the remove button is not displayed.

# Ontrack: Removing Multiple Learners from an Item

# Removing Multiple Learners

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Ontrack - Training Item Enrollment

Training Item: CPR Certification [Filter]

Start Date: [mm/dd/yyyy] End Date: [mm/dd/yyyy]

**Select**

Add Learners to Item There are 2 hidden items.  Show hidden items Refresh

Re-Schedule Date: [mm/dd/yyyy] Reschedule Selected **Remove Selected** Save Changes

Scheduled Learners (1 listed)

Name	Facility	Dept.	Job Code	Due	Completed	Comp.	Comp. By	Score	Contact Hours	CE Hours	Hide	Reschedule
<input type="checkbox"/> demo example	01	CDSADMIN		9/2/2010	9/2/2010	<input checked="" type="checkbox"/>	Demonstration Purpose	98.00	6			

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From the menu bar, select **Classes & Events — Ontrack — Item Enrollment**.

From the 'Training Item', use the drop-down to **select the item you want to open**.

**Tip:** If you want to find a specific item and you know the date of the training, enter the date to narrow your search. You must use both the **Start Date** and **End Date**.

Click the **Select** button.

A table of 'Scheduled Learners' for the item displays.

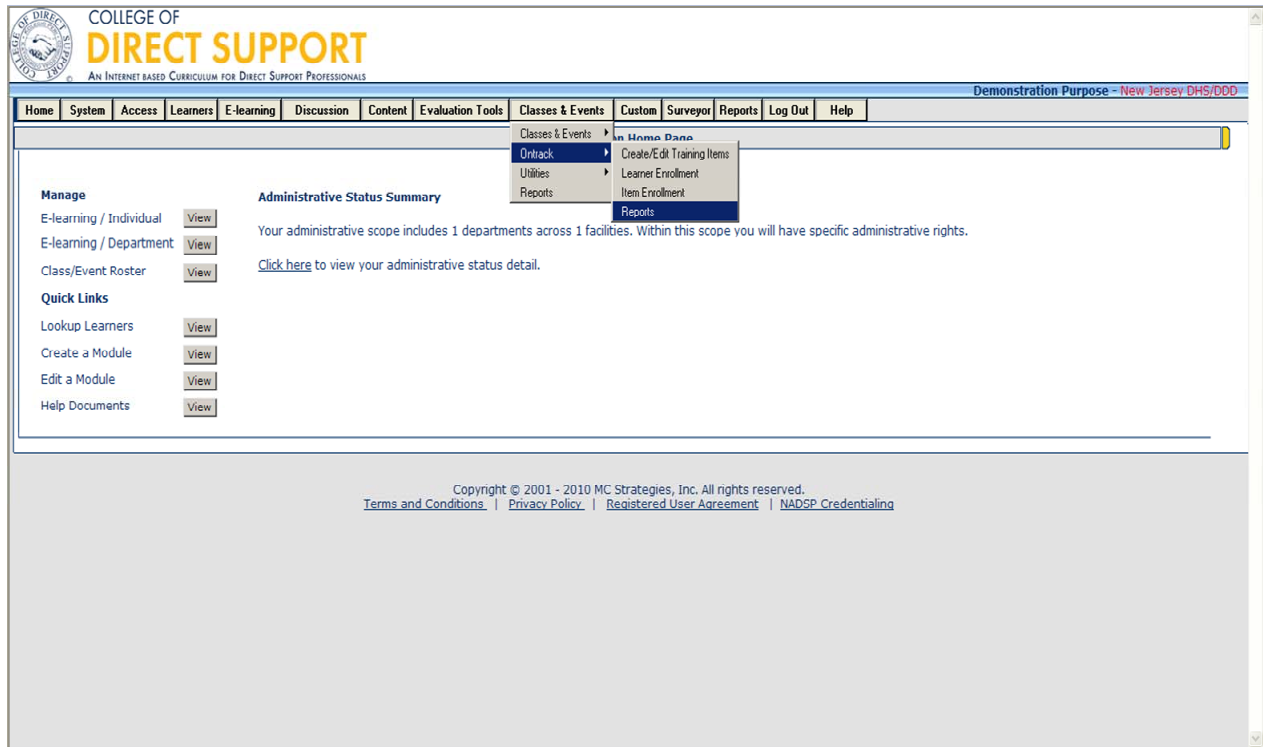
**Select the checkbox to the left of each Learner's name** you want to remove from the item.

Click the **Remove Selected** button. A message opens asking you to confirm you want to remove the selected Learners.

Click **OK**, and a confirmation displays across the top of the page displaying the names of the Learners that were removed from the item.

# Running Reports on Ontrack Items

# Classes & Events – Ontrack - Reports



You may export your OnTrack reports into an Excel spreadsheet.

## Steps to Open Reports

Click **Classes and Events — OnTrack— Reports**

The OnTrack Report Manager opens.

**Tip:** You may also open OnTrack reports from the Reports tab.

# Classes & Events – Ontrack – Reports

**OnTrack Report Manager**

Select the report to run from the those listed below by clicking on the link. If additional information is needed you will be prompted for it. Since you may want to print, the reports will not have any navigation links on them. Use the **Back** button in your browser to return to this page.

Item Reports		
Report Type	Reports Available	Description
<a href="#">Item Listing</a>	Master Item Listing	Lists all OnTrack items created on the system with details for each item.
Learner Reports		
Report Type	Reports Available	Description
<a href="#">Department Detail</a>	Department Detail Report	Listing of completion and incomplete data by department.
<a href="#">Completed Items By Complete Date</a>	Completed Items By Complete Date	Completed Items By Complete Date.
<a href="#">Completed Items By Scheduled Date</a>	Completed Items By Scheduled Date	Completed Items By Scheduled Date.
<a href="#">Incomplete Items By Scheduled Date</a>	Incomplete Items By Scheduled Date	Incomplete Items By Scheduled Date.
<a href="#">Incomplete Items By Created Date</a>	Incomplete Items By Created Date	Incomplete Items By Created Date.

## Item Listing Report (about Items)

Item listing reports list all OnTrack items created on the system with details for each item (e.g., CEU Hours, CEU Provider).

## Steps to Use the Item Listing Report

From OnTrack Report Manager, click **Item Listing**.

The OnTrack Item Listing Report opens.

# Classes & Events – Ontrack – Reports – Item Listing



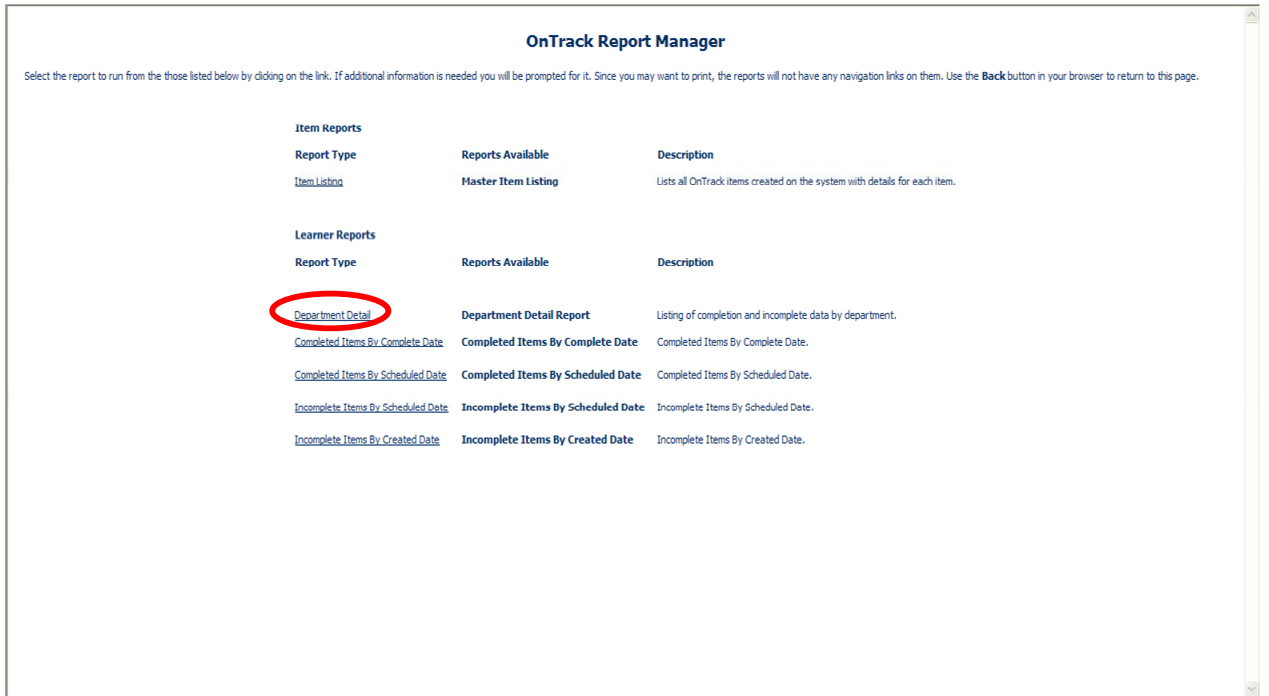
Master OnTrack Item Listing

<u>Item code</u>	<u>Item Description</u>	<u>CEU Hours</u>	<u>CEU Provider</u>	<u>Hours</u>	<u>Item Type</u>
	CPR Certification	2			Certification
	Fingerprinted - Cleared Background Check				Required
	Overview of Developmental Disabilities			8	Orientation Requirement
	TEST - Overview of DD completed prior to 2009				Required

Lists all OnTrack items created on the system with details for each item.



# Classes & Events – Ontrack – Reports



## Department Detail Report (about Learners)

Displays Facility, Department, Learner Name, Scheduled and Completed dates, and Scores for any Learner that completed the selected item. Totals for each department display and at the bottom of the report the grand totals display for Assigned, Completed, and a Completion Percentage.

If you select Show Inactive Learners, the inactive Learner details display as well as all the active Learners.

## Steps to Use the Department Detail Report

Click **Department Details**.

# Classes & Events – Ontrack – Reports

The screenshot shows a web form titled "Department Detail Report". At the top, there is a dropdown menu for "Training Item" set to "All Training", which is circled in red. Below this are two date input fields for "Start Date" and "End Date", both with calendar icons and the format "(mm/dd/yyyy)". A note below the dates states "(Note: Date range is based on scheduled date)". There are three checkboxes: "Show hidden items", "Show Inactive Learners", and "Show Current Department/Facility". Below these is a "Select a Facility" dropdown menu currently showing "New Jersey DHS/000" and a "Select Facility" button. At the bottom, there are radio buttons for "Sort Departments by" with options "Dept Code" and "Dept Name". A "Department:" label is followed by the text "Select a facility first." and a "Select" button, which is also circled in red.

From drop-down list, select an **OnTrack item** for the report.

Optional. Select a **Start Date** to narrow your search.

Optional. Select an **End Date** to narrow your search.

Optional. Select the **Show hidden items**

Optional. Select the **Show Inactive Learners**

Click the **Select** button.

Your totals display for each department and then grand totals display for all departments listed for assigned, completed and a completion percentage. The example below shows one facility with two departments and one Learner in the first department and two Learners in the second department that completed the item and each Learner scored 100 on the item. At the bottom of the report, the grand totals display for the 2 departments for assigned, completed, and completion percentage.

# Classes & Events – Ontrack – Reports



## OnTrack Reports (about Learners)

Displays a detailed listing of OnTrack Reports (e.g., by complete date, incomplete by schedule date).

### Steps to Use the (Learner) Ontrack Reports

Click “Ontrack Reports”

Select which report to run:

**Department Detail – all information for the department regarding Ontrack items**

**Completed, by Complete Date – gives information on all Learners in the department that have completed specific training(s) according to date is was completed by**

**Completed, by Scheduled Date** – gives information on all Learners in the department that have completed specific training(s) according to the date the training was scheduled

**Incomplete, by Scheduled Date** – gives information on all Learners in the department that have not completed specific training(s) according to the date the training was scheduled.

**Incomplete, by Created Date** – gives information on all Learners in the department that have not completed specific training(s) according to the date the training was created.

# Classes & Events – Ontrack – Reports – Report List

Completed, by Complete Date

Training Item: [dropdown]

Start Date: [calendar icon] End Date: [calendar icon]

Show hidden items  Show Inactive Learners  Show Current Department/Facility  
(not checked shows learner's department/facility at time of assignment)

Select a facility: [dropdown] [dropdown]

Sort Departments by:  Dept Code  Dept Name

Select department:

**There are no Departments**

[Select]

Grand Totals:      Assigned:      Completed:      Completion Percent: %

From drop-down list, select a **Training Item**.

Optional. Select a **Start Date** to narrow your search.

Optional. Select an **End Date** to narrow your search.

Select from the following optional selections:

Show hidden items

Show Inactive Learners

Show Current Department/Facility (if you do not select this checkbox, the Learner's department/Facility at the time of the assignment displays).

From the 'Select a facility' drop-down, select a **Facility's name**.

From 'Sort Departments by' select either **Dept Code** or **Dept Name**.

Click the "**Select**" button.

This report displays Item information for those that fit the criteria selected as displays the grand totals for assigned, completed and a completion percentage.

# **Assigning E-Learning (online training)**

There are several ways to assign E-Learning: by Individual, by Department and by Selected Learners (choosing multiple Learners from multiple areas within an agency).

# CDS Curriculum

- 24 Courses in the General CDS Curriculum
  - National Best Practice
  - Multi-media and interactive
  - 4-8 Lessons Each
  - Tests
  - Suggested On-the-Job Competency Demonstration
- Disability Intensive Courses
- Film for Thought
- College of Frontline Supervision & Management
- More courses added and updated annually

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## **Flexibility in Offering Coursework**

- Agencies may develop their own practices for offering courses/lessons to its staff
- Agencies have utilized the CDS for its state-of-the-art curriculum in many ways. This includes: on the clock/off the clock training, external/internal computer options, creative resources and motivation, seminars, and other flexible methods.
- Using the online trainings for continuing education opportunities for DSPs is encouraged.



# New Jersey Career Path

- Career Path Level I & II
  - College of Direct Support
    - 7 Training Courses in each level
      - 4 to 8 lessons in each module
      - At least an 80% on tests, can take up to 3X
  - Mentors support using skills on the job
  - The Portfolio documents that learning is used on the job and activities have been completed.
  - Current Career Path requirements differ from the model used in the pilot = Greater flexibility for agencies

## **College of Direct Support Courses incorporated with mentoring, on the job skill building, and portfolio completion**



### **Level 1 Courses Include:**

- Direct Support Professionalism
- Safety at Home and in the Community
- Documentation
- Community Inclusion
- Individual Rights and Choices
- Teaching People w/DD
- Cultural Competence



## **Level 2 Courses Include:**

- Employment Supports: Exploring Individual Preferences and Opportunities for Job Attainment
- Person-Centered Planning
- Supporting Healthy Lives
- You've got a Friend: Supporting Family Connections, Friends, Love and the Pursuit of Happiness
- Positive Behavior Support
- Working with Families
- Everyone Communicates



- Mentoring continues with a mentor with similar concentration expertise
- Portfolio development focused around concentration.

<b>Level III (Concentrations)</b> <small>*Amount of required training and mentoring TBD</small>	
Mental Health Supports* Aging/End of Life Health Supports Person Centered Planning/Inclusion Multiple Disabilities Traumatic Brain Injury Autism Supervision Positive Behavior Supports Leadership/Mentoring	Level 3 coursework to be completed online, using existing College of Direct Support courses and lessons uploaded to the CDS, in combination with classroom based training. NJ Specializations will align with NADSP specialization requirements, although there will be more specialization options in NJ.

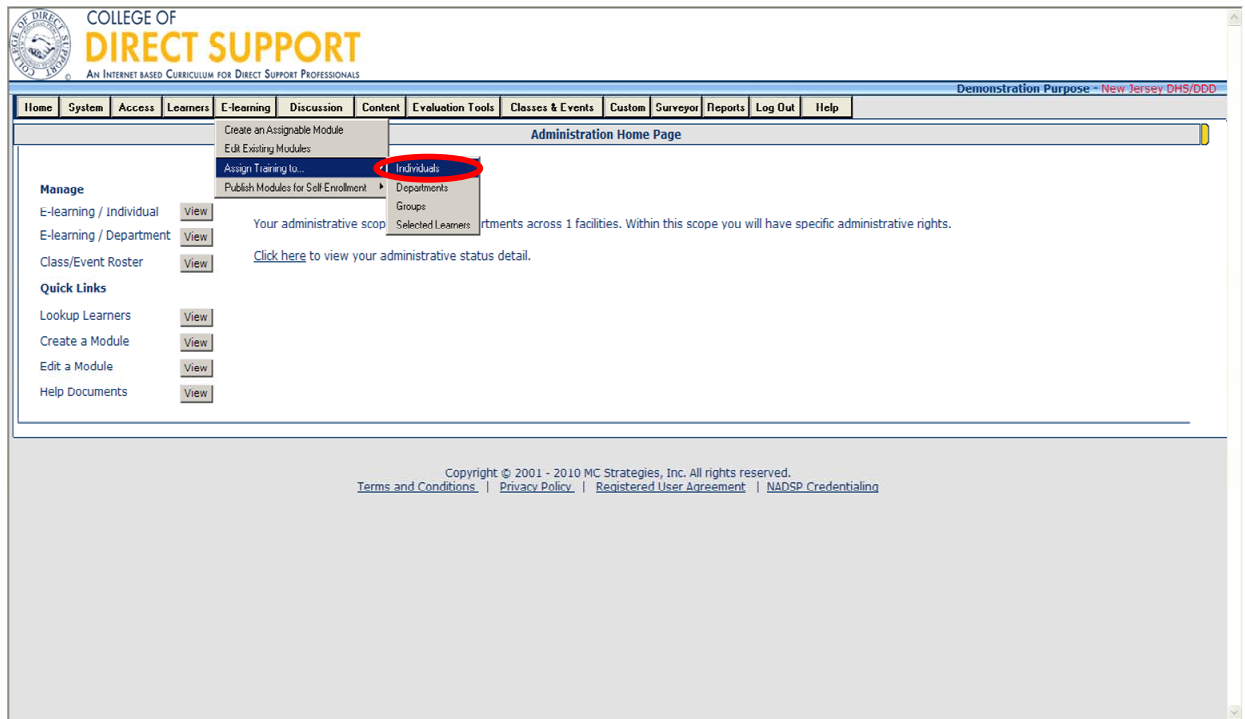
\*Currently in development

# Pilot Outcomes

- Agency Turnover Survey Results:
  - Overall Agency reduction from 36% to 26%
  - Reduction from 38% to 12% in the part of the agency where staff could voluntarily participate in the career path training.
  - Only 16% of the people participating in the career path left their organizations.
  - Reduction in turnover leads to cost savings which maybe reinvested in the workforce and organization.
- NJ Community College faculty review committee recommended that the Career Path be accepted as 9 credits toward an Associate's Degree in Human/Social Services. Raritan Valley Community College has operationalized this. We will work with stakeholders to make this this option available at multiple community colleges throughout the state.
- 100% of responding DSPs strongly agreed/agreed that they would recommend that all DSPs participate in the Career Path and that as a result of the Career Path they are more likely to continue their careers as DSPs.

# Assign E-Learning by Individual

# E-Learning – Assign training to – Individual



## Assign E-Learning to an individual Learner

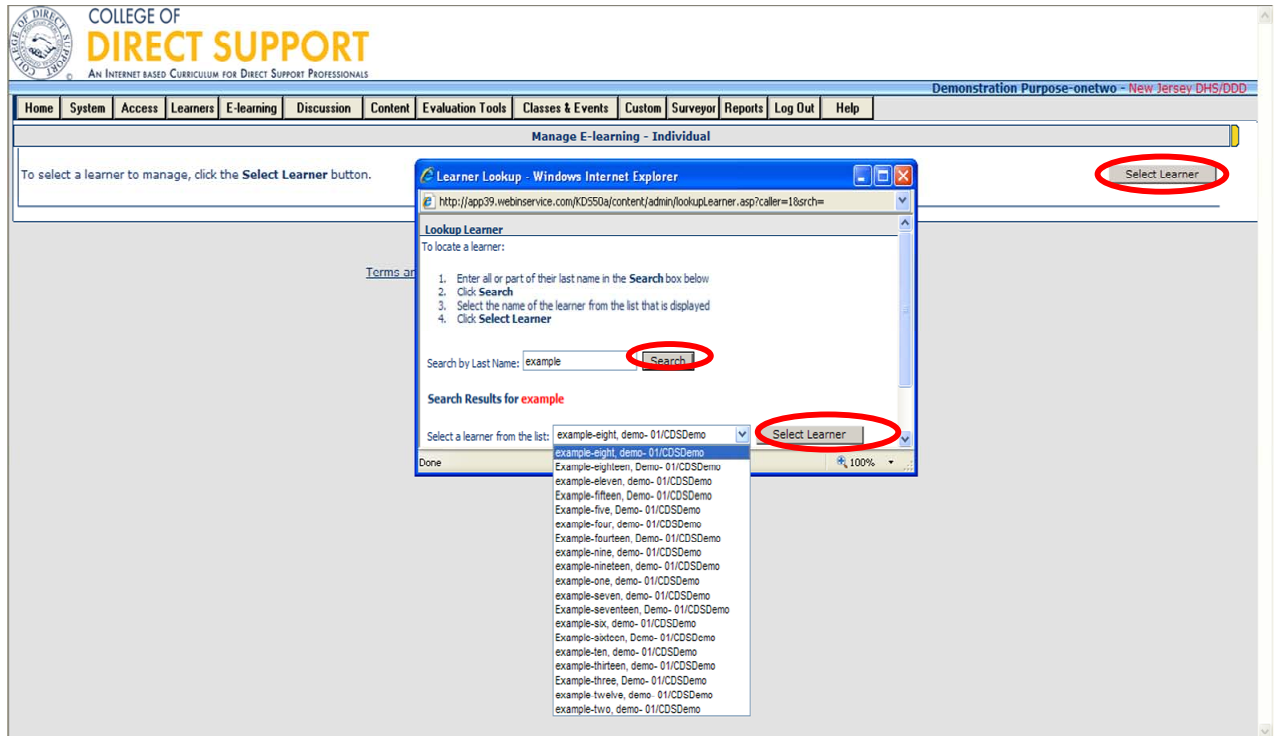
There are several different ways to assign E-Learning to an individual Learner.

**Note:** To add modules to one Learner at-a-time, you can also use the 'Manage Training' page from Lookup Learners (see Looking Up and Editing Learner Information in the manual). The advantage of using this page is that you can assign both modules and Classes & Events from the same page.

Modules can be assigned to individuals (one Learner at-a-time), department or the entire department and "selected Learners" (a group of Learners you create based on the position code you have created). The basic procedure for assigning modules is the same for each, these instructions focus on assigning a module to an individual.

From the menu bar, select **E-Learning — Assign Training To — Individuals**.

# E-Learning – Assign training to – Individual – Lookup Learner



Click the **Select Learner** button on the right.

From the “Lookup Learners’ pop-up, type in all or part of a Learner’s last name and click the **“Search”** button.

From the drop-down menu, click on a specific Learner from the list.

Click **“Select Learner”** button.

The ‘Manage E-learning’ page for the selected Learner opens.



# Individual – E-Learning Assign Modules

The screenshot displays the 'Manage E-learning - demo example' interface. At the top, there is a navigation menu with tabs: Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The 'E-learning' tab is active, and the 'E-learning Assign Modules' sub-tab is selected. Below the navigation, there is a 'Select Learner' button. The main content area is titled 'Manage assignments for: example, demo'. It contains two sections for selecting modules: 'Modules your Department Created' and 'Modules available to Everyone'. Each section has a dropdown menu and buttons for 'Edit', 'View', 'Assign Now', and 'Assign Later'. The 'Assign Now' button in the 'Modules available to Everyone' section is highlighted. Below these sections, there is a table of assigned modules with columns for 'Assigned Module Name' and 'Assignment Priority'. The table shows one module: 'EMB- DSP Professionalism'. At the bottom of the page, there is a copyright notice: 'Copyright © 2001 - 2010 MC Strategies, Inc. All rights reserved. Terms and Conditions | Privacy Policy | Registered User Agreement | NADSP Credentialing'.

Select the **E-Learning Assign Modules** tab.

Select a module from either the drop-down for **Modules your Department Created** (including all uploaded trainings created by your agency) or the drop-down for **Modules available to Everyone**.

Optional. If you want to see all the lessons in the module, you can click the **View** button.

Optional. If you want to edit the module and lesson properties or delete lessons from the module, click the **Edit** button.

Click on either the **Assign Now** or **Assign Later** button.

**Assign Now** – Adds the selected module in the Learner’s lesson plan immediately.

**Assign Later** – Adds the module in a “holding area” that keeps the module off the Learner’s lesson plan until the Learner has 3 or less incomplete lessons in his/her lesson plan. The next time a Learner logs in the module in the holding area will be assigned.

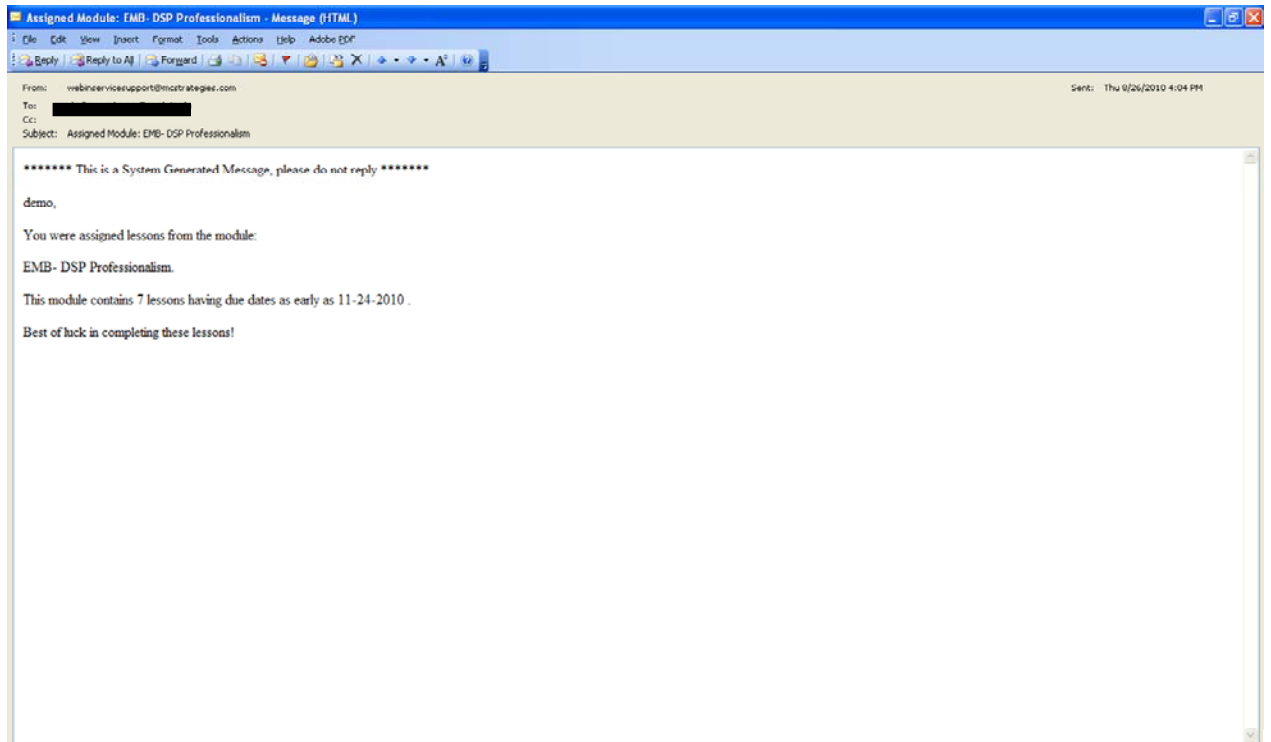
**Note:** If you use **Assign Later** the lessons do not appear until the next time a Learner logs in. If they have completed all the lessons in their lesson plan and they think they have completed their training they may not log in again and will not receive the next module.

**Note:** If you selected the ‘Assign Now’ button, you receive a popup to make the assignment and send email to the Learner. Click OK if you want to send the assignment and the email. OR, click Cancel if you only want the assignment made no email will be sent. You do not get the option to send the email elect to assign the module later.

**Tip:** You will be directed back to the ‘E-learning Assign Modules’ tab where you can continue to add more modules as needed for the selected Learner.

**Tip:** From this screen you can also remove and reassign modules as well as edit a module and view the lessons within a module.

# Email that module was assigned



Once a learner has been assigned a module or lesson they will receive a email confirming the assignment.

# E-learning – Assign training – Individual – E-learning detail

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Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Manage E-learning - demo example

To select a learner to manage, click the **Select Learner** button.

E-learning Detail E-learning Assign Modules E-learning Lesson Management Class & Event Completions Class & Event Management Class & Event Enrollment

E-learning Detail - by Module Assigned  
Learner: example, demo

Sort by Complete By Date Sort by Module Name

Module: **EMB- DSP Professionalism** Remove Reassign

Assigned Lesson (click to view Introduction)	Credits By	Due Date	Completed On	Learning Completed	Testing Completed	Score	Pretest Completed	Pretest Score
<a href="#">Direct Support Professionalism: Introduction</a>		11-24-2010						
<a href="#">Direct Support Professionalism: Becoming a Direct Support Professional</a>		11-24-2010						
<a href="#">Direct Support Professionalism: Contemporary Best Practices</a>		11-24-2010						
<a href="#">Direct Support Professionalism: Applying Ethics in Everyday Work</a>		11-24-2010						
<a href="#">Direct Support Professionalism: Practicing Confidentiality</a>		11-24-2010						
<a href="#">Direct Support Professionalism: Working with Your Strengths and Interests</a>		11-24-2010						
<a href="#">Direct Support Professionalism: Health Insurance Portability and Accountability Act (HIPAA)</a>		11-24-2010						

Awaiting assignment

Lesson Name (click to view Introduction)	Module Name	Complete Days	Complete Lesson By	Priority

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Back at the Manage E-Learning Page you can also view the E-Learning Detail – detailed description of all E-Learning lessons assigned to the Learner. On this page you can view the E-Learning Detail for the learner and sort it by complete by date or by module name.

# Individual – E-Learning Lesson Management

COLLEGE OF DIRECT SUPPORT  
AN INTERNET-BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Demonstration Purpose - New Jersey DHS/DDO

Manage E-learning - demo example

To select a learner to manage, click the **Select Learner** button.

E-learning Detail E-learning Assign Modules **E-learning Lesson Management** Class & Event Completions Class & Event Management Class & Event Enrollment

Manage lessons for: **example, demo**  All Lessons  Incomplete Lessons Show Save Changes

Edit	Assigned Lesson (click to view Introduction)	Due	Pri.	Complete	Score	Pretest Score	Remove
<input type="checkbox"/>	<a href="#">Direct Support Professionalism: Introduction</a>	11-24-2010	4				<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Direct Support Professionalism: Becoming a Direct Support Professional</a>	11-24-2010	4				<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Direct Support Professionalism: Contemporary Best Practices</a>	11-24-2010	4				<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Direct Support Professionalism: Applying Ethics in Everyday Work</a>	11-24-2010	4				<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Direct Support Professionalism: Practicing Confidentiality</a>	11-24-2010	4				<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Direct Support Professionalism: Working with Your Strengths and Interests</a>	11-24-2010	4				<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Direct Support Professionalism: Health Insurance Portability and Accountability Act (HIPAA)</a>	11-24-2010	4				<input type="checkbox"/>

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You can also view E-Learning Lesson Management which allows you to view all or incomplete lessons, lessons assigned, the date each lesson is due, priority of each lesson, dated lesson was completed, final score and pretest score for the learner. You can also remove or edit each lesson assigned to the learner. When assigning modules and/or lessons you can change the priority level and due dates.

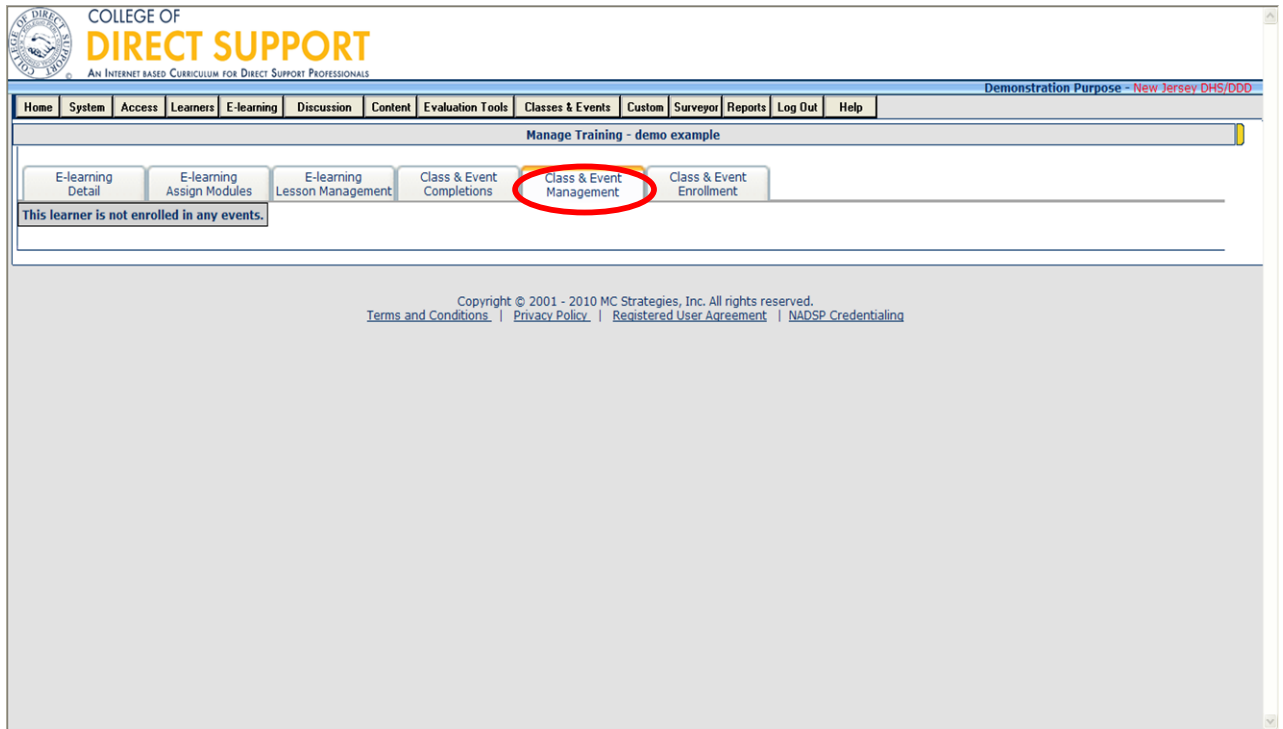
**Note:** Remember to click “**Save**” before moving on from the current page.

# Manage Training – Class & Event Completions

The screenshot displays the web interface for the College of Direct Support. At the top left is the logo and name 'COLLEGE OF DIRECT SUPPORT' with the tagline 'AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS'. A navigation menu includes links for Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The current page title is 'Manage Training - demo example'. Below the navigation, there are several tabs: 'E-learning Detail', 'E-learning Assign Modules', 'E-learning Lesson Management', 'Class & Event Completions' (which is circled in red), 'Class & Event Management', and 'Class & Event Enrollment'. A message box below the tabs states 'This learner has not attended/completed any events.' At the bottom of the page, there is a copyright notice: 'Copyright © 2001 - 2010 MC Strategies, Inc. All rights reserved.' and links for 'Terms and Conditions', 'Privacy Policy', 'Registered User Agreement', and 'NADSP Credentialing'.

From the Manage Training tab you can view Class/Event completions for the Learner.

# Manage Training – Class & Event Management



From the Manage Training tab you can manage Classes/Events...

# Manage Training – Class & Event Enrollment

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AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Manage Training - demo example

E-learning Detail E-learning Assign Modules E-learning Lesson Management Class & Event Completions Class & Event Management **Class & Event Enrollment**

Search for courses like:  Start Date: 9/2/2010 (mm/dd/yyyy)  
At Facility: All End Date: 12/1/2010 (mm/dd/yyyy) List Events

No events by that subject were found at that ANY location.

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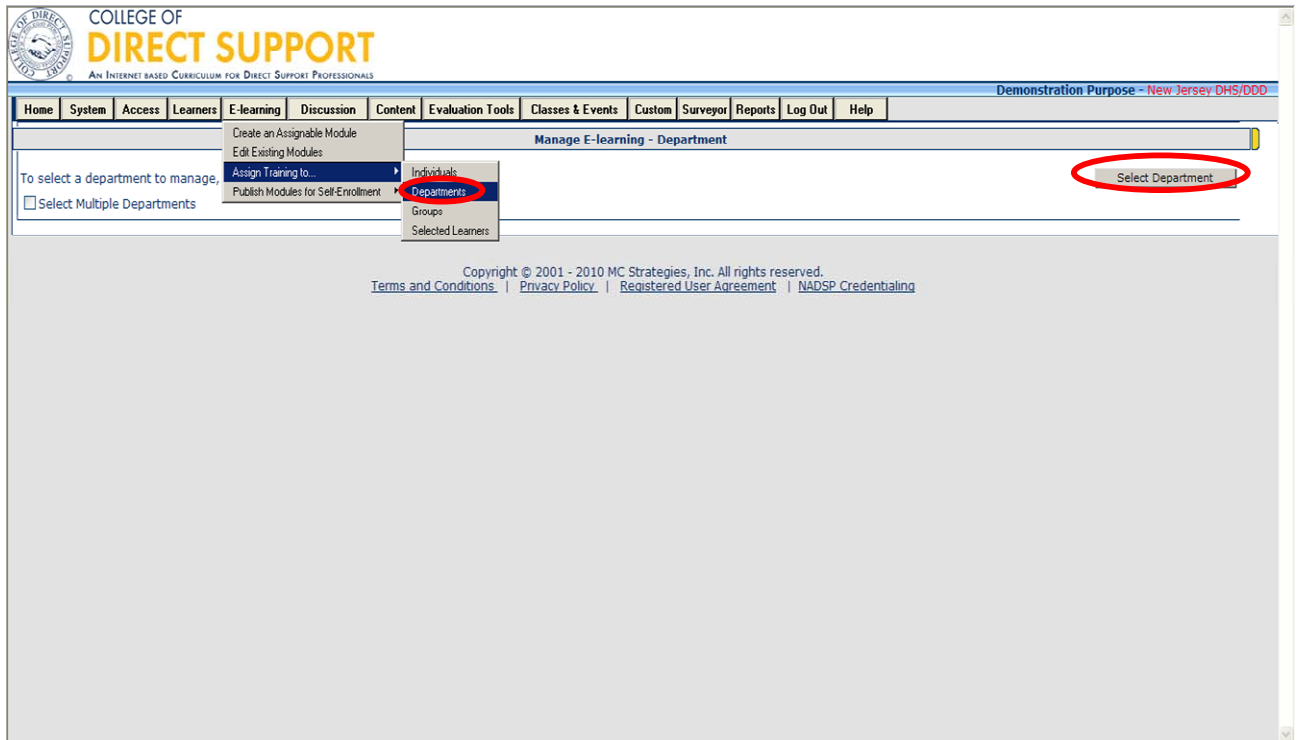
And enroll the Learner in Classes and Events.

Note: You can search for Classes & Events by course title, facility or start and end dates. Once you have entered your search criteria, click “**List Events**” and choose the class/event to be assigned to the Learner.



# Assign E-Learning by Department

# E-learning – Assign Training – Department



## Assigning training to the entire department (agency)

The procedure for assigning training to the entire department is slightly different than assigning training to an individual Learner (as demonstrated earlier in the manual).

**Note:** You will only be able to assign training to your own department (agency) unless otherwise specified.

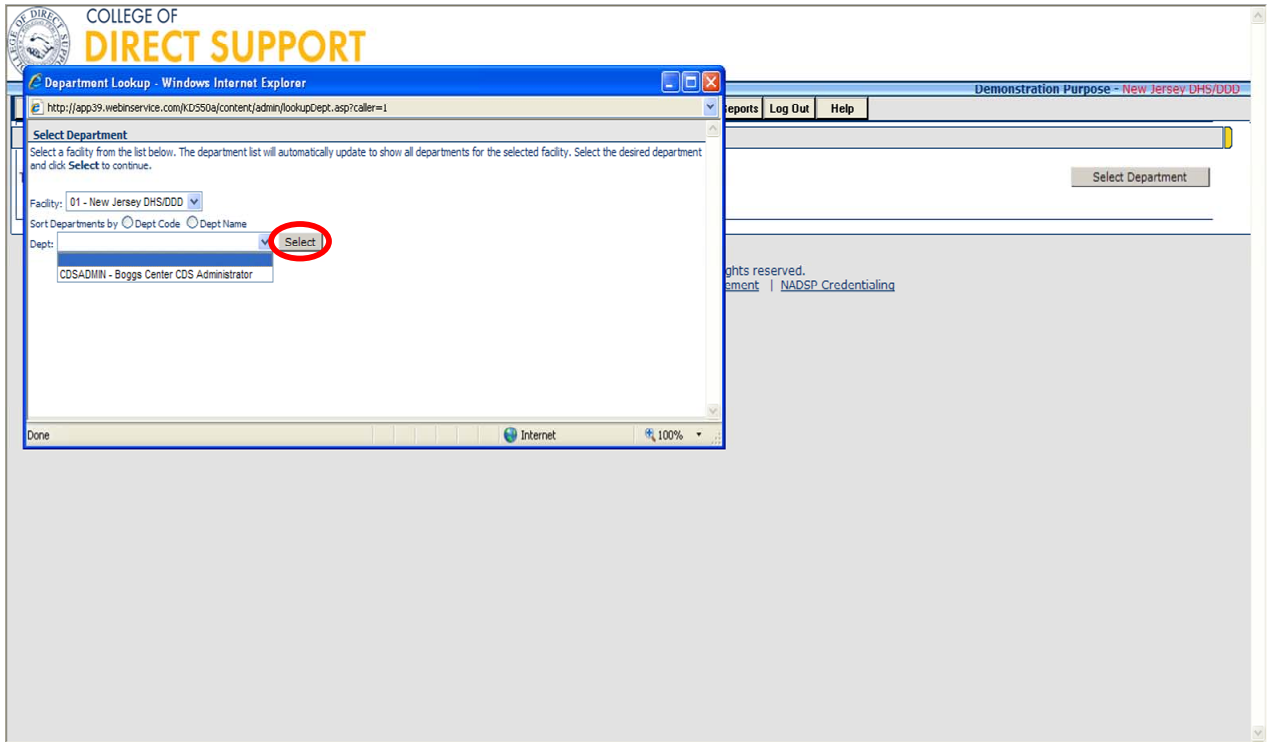
From the menu bar, select **E-Learning – Assign Training To – Departments**.

Click **“Select Department”**.

**Note:** If you have access to multiple departments (multiple agencies) and you want to select more than one Department, click the ‘Select Multiple Departments’ checkbox on the left before clicking **“Select Department”**.

The ‘Department Lookup’ popup opens.

# E-Learning – Assign Training – Department



Your facility will be New Jersey DHS/DDD (unless otherwise specified) and your department will be (the name of your agency, unless otherwise specified).

Once you have chosen the facility and department, click **"Select"**.

# E-Learning – Assign Training – Department

The screenshot displays the 'Manage E-learning - Department' page. At the top, there is a navigation menu with options like Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. Below the menu, there is a 'Select Department' button and a 'View Dept learners' button, both of which are circled in red. The main content area is divided into two sections: 'Modules your Department Created' and 'Modules available to all Facilities'. Each section has a dropdown menu for selecting a module and buttons for 'Edit', 'View', 'Assign Now', and 'Assign Later'. The 'Assign Now' buttons in both sections are also circled in red. Below these sections, there is a table for 'Assigned Module Name' with columns for 'Learners', 'Remove', and 'Reassign'. At the bottom, there is a section for 'Awaiting Assignment to Department' with an 'Assignment Priority' column.

Click on the Modules you want to assign from '**Modules your Department Created**' (specific modules your agency created including those uploaded into the system) or '**Modules available to all Facilities**' (all modules available to all agencies through DDD).

Optional. If you want to see all the lessons in the module, you can click the **View** button.

Optional. If you want to edit the module and lesson properties or delete lessons from the module, click the **Edit** button.

**Note:** You can view the Department Learners before assigning the Modules. Click "View Dept. Learners"

Once you have chosen the Modules you want to assign to the department, click either the "**Assign Now**" or "**Assign Later**" button.

**Assign Now** – Adds the selected module in the Learner’s lesson plan immediately.

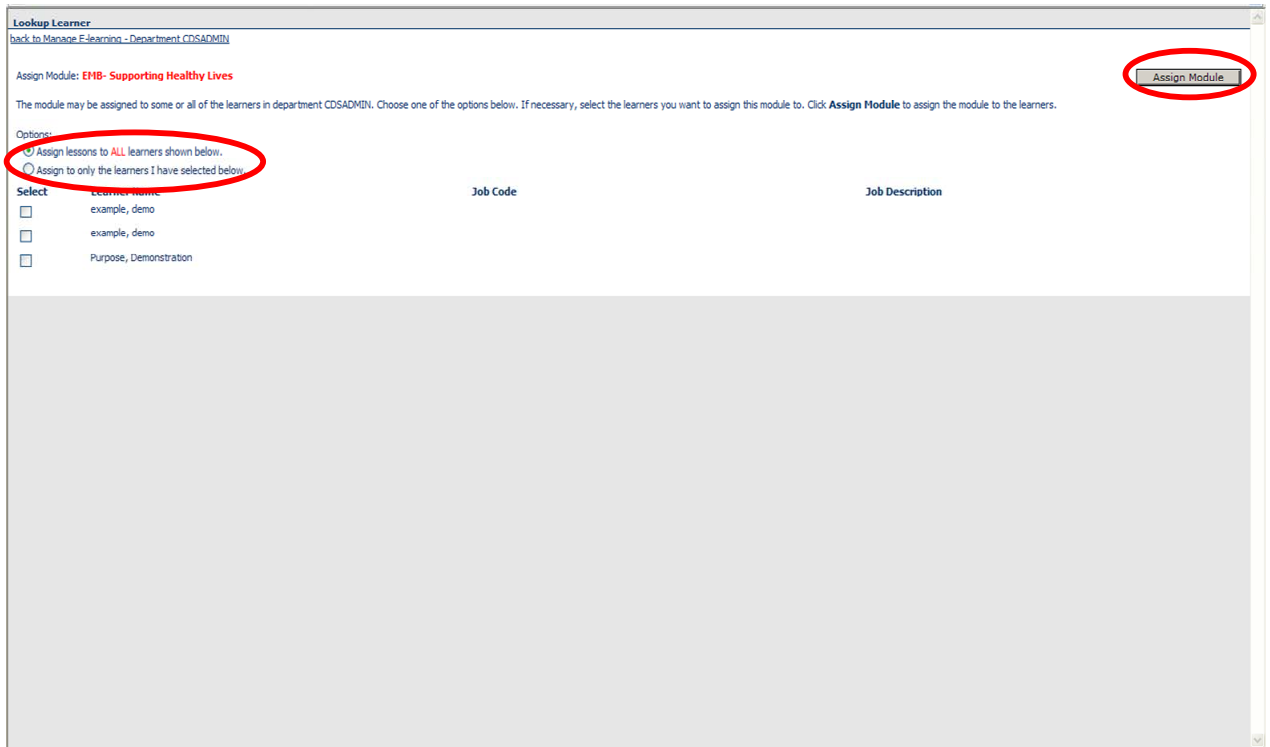
**Assign Later** – Adds the module in a “holding area” that keeps the module off the Learner’s lesson plan until the Learner has 3 or less incomplete lessons in his/her lesson plan. The next time a Learner logs in the module in the holding area will be assigned.

**Note:** If you use **Assign Later** the lessons do not appear until the next time a Learner logs in. If they have completed all the lessons in their lesson plan and they think they have completed their training they may not log in again and will not receive the next module..

If you selected the ‘Assign Now’ button, you receive a popup to make the assignment and send email to the Learner. Click “**OK**” if you want to send the assignment and the email. OR, click **Cancel** if you only want the assignment made no email will be sent. You do not get the option to send the email elect to assign the module later.

A new popup window will appear showing all Learners in the department.

# E-Learning – Assign Training – Department



You can choose to assign the training to all of the learners in a department (click “**Assign lessons to ALL learners shown below**”), or to select learners (click “**Assign to only the learners I have selected below**”, then click on the box next to Learner(s) you want to assign the lessons to) to have the training assigned to from within the department.

Click “**Assign Module**”.

# Viewing Department Learners Before Assigning Training

The screenshot shows a web browser window titled "Active Learners in Department CDSADMIN - Windows Internet Explorer". The address bar shows the URL: <http://app39.webservice.com/KDSS0a/content/admin/lookupDeptLearners.asp?dept=CDSADMIN>. The page header includes the College of Direct Support logo and the text "COLLEGE OF DIRECT SUPPORT". The main content area displays a table of active learners assigned to the department CDSADMIN. The table has columns for "Lastname", "First", "MI", and "Last Login Active". Below the table, there are buttons for "Edit", "View", "Assign Now", and "Assign Later". At the bottom of the page, there is a section titled "Awaiting Assignment to Department" with the text "No modules are awaiting assignment." and a link for "Assignment Priority".

Lastname	First	MI	Last Login Active
example	demo		Yes
example	demo		Yes

Purpose: Demonstration 9/2/2010 Yes

Buttons: Edit, View, Assign Now, Assign Later

Buttons: View, Assign Now, Assign Later

Buttons: Learners, Remove, Reassign

Assignment Priority

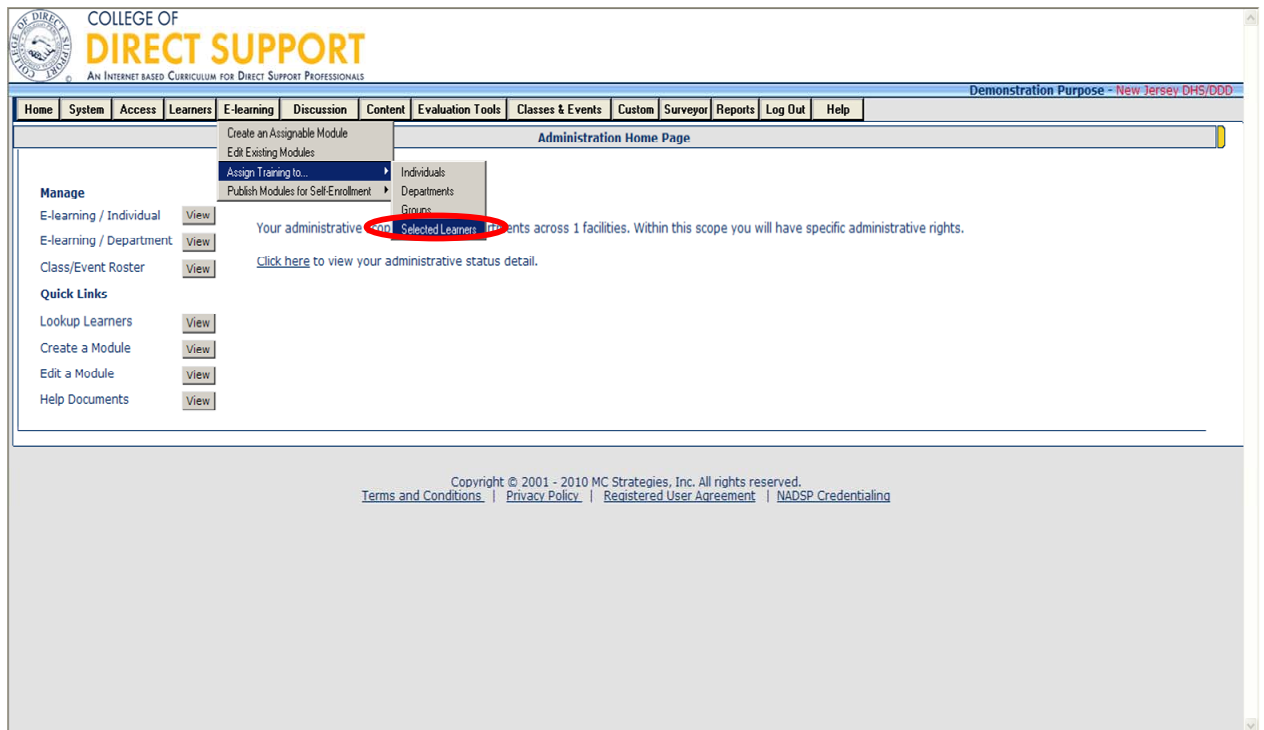
Awaiting Assignment to Department  
No modules are awaiting assignment.

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# Assign E-Learning by Selected Learners



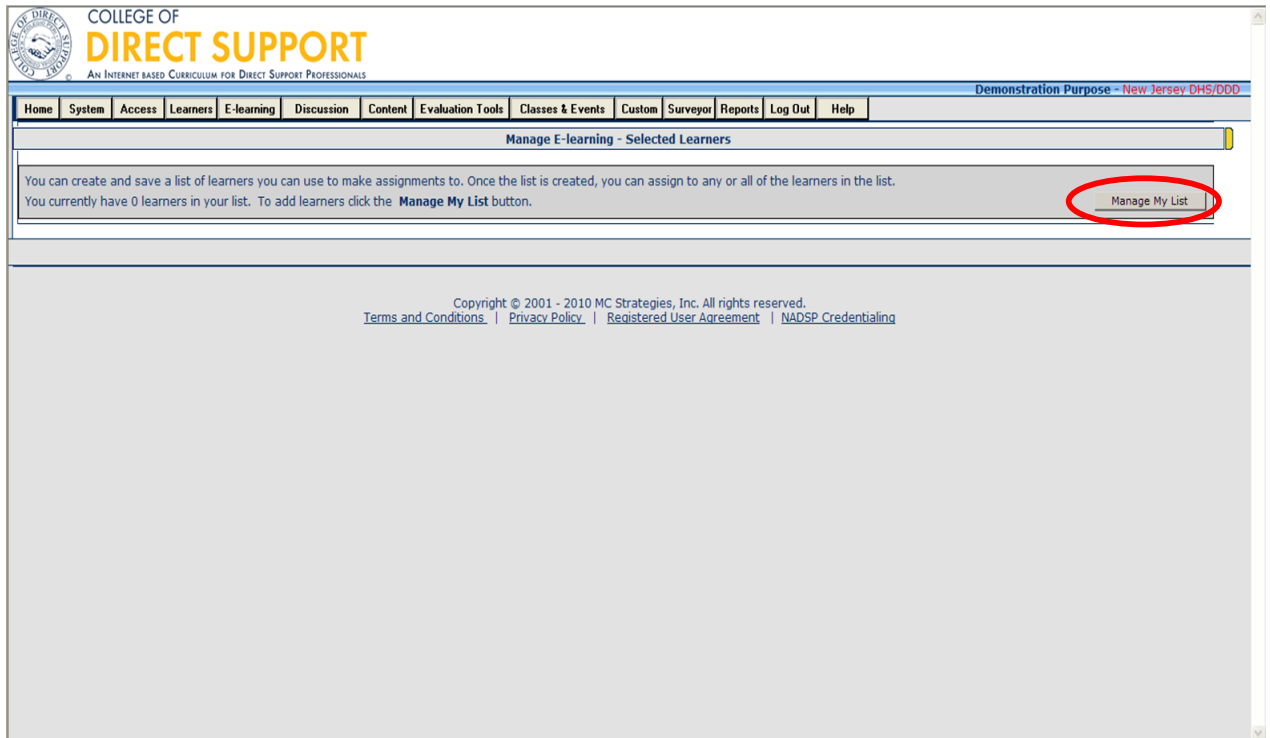
# E-Learning – Assign Training – Selected Learners



When you want to group Learners from different departments to assign training to, you might want to create a list of selected Learners. You have one list of selected Learners; however, you can easily edit the list as needed.

From the menu bar, select **E-Learning – Assign Training To – Selected Learners**.

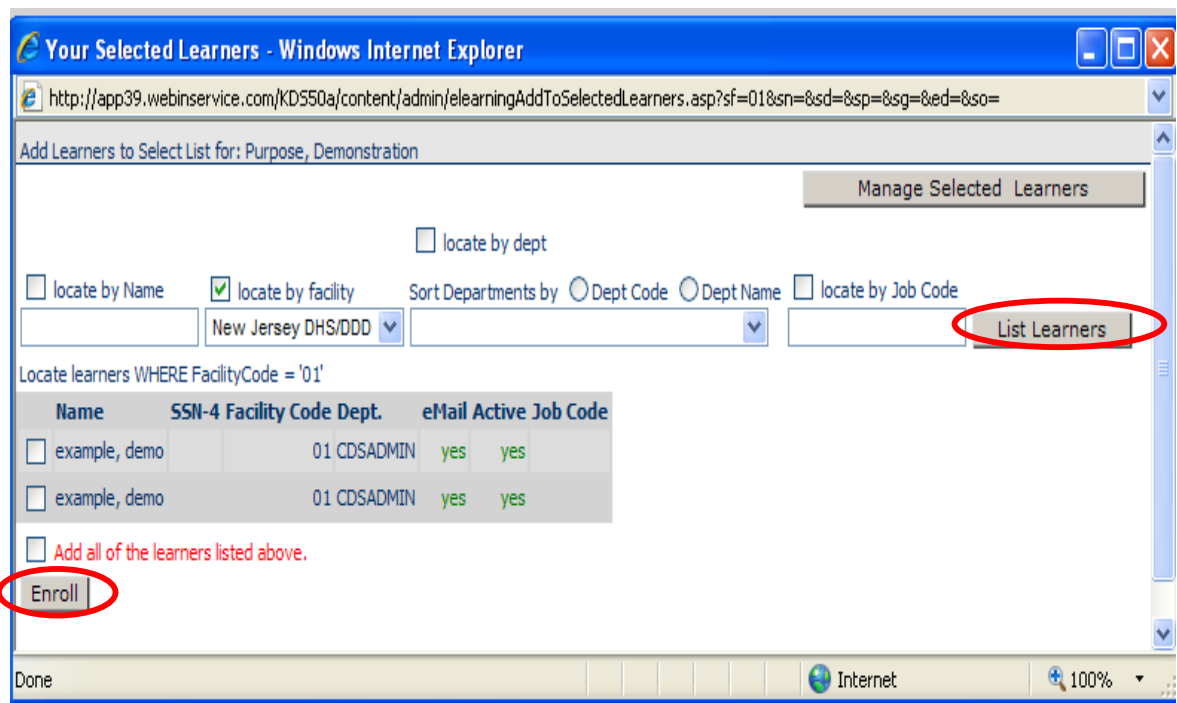
# E-Learning – Assign Training to – Select Learners



Click “**Manage My List**” button to add Learners to the list.

In the popup window, click “**Add Learners**”.

# E-Learning – Assign Training – Selected Learner



**Note:** This is a great way to assign lesson to multiple learners all at once (i.e. assigning training to Learners by position codes). You can only create one List, but you can make adjustments to the list when necessary.

You can locate learners by name, facility, department, and/or job code.

Enter search information to find one or more Learners. You must also select the checkbox for each of your search selections.

**Tip:** If you want one specific Learner, enter the last name of the Learner. If you want to narrow your search, enter a Facility. Department and/or Job Code.

**Tip:** If you want to return multiple Learners, use a ‘ % ‘ sign to return all names from your other selected items.

Click “**List Learners**”

Check the boxes of each Learner’s name you would like to include, then click “**Enroll**”.

**Tip:** If you want to include all the Learners listed, click the ‘Add all of the Learners listed above’ checkbox.

# Learners Are Added to List

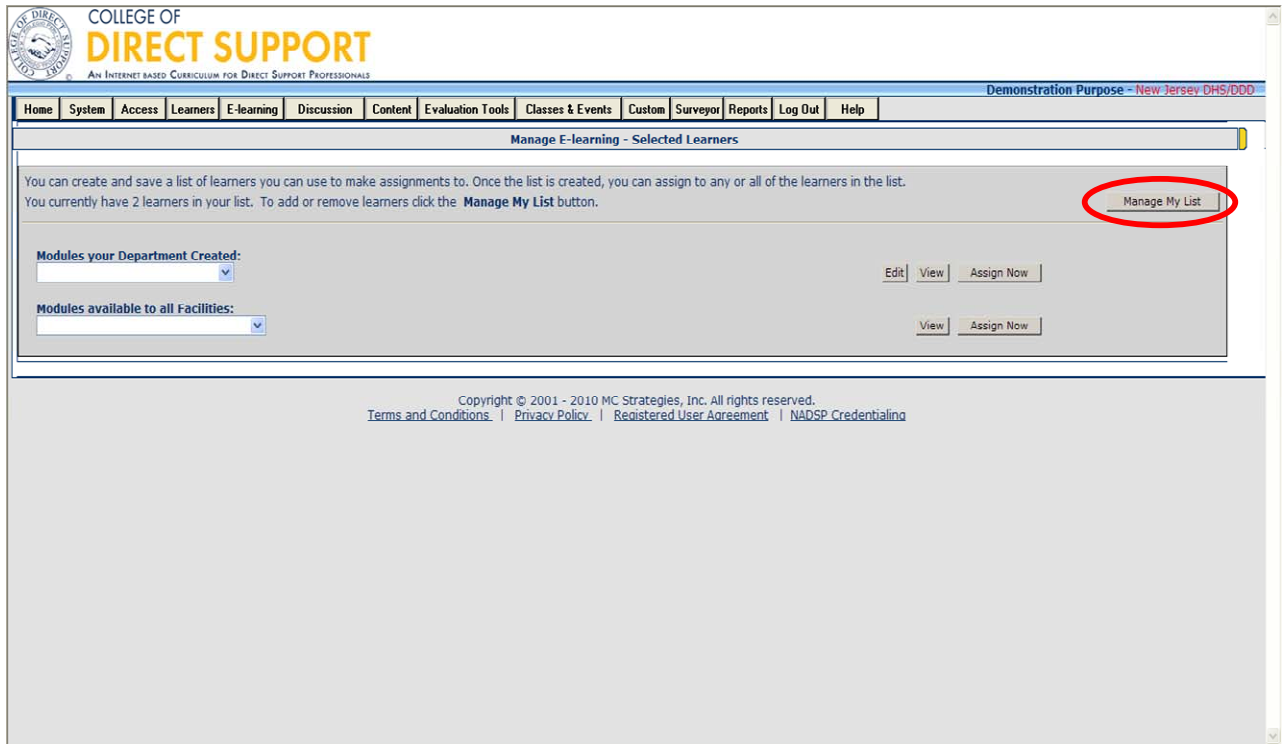
The screenshot shows a web application window titled "Add Learners to Select List for: Purpose, Demonstration". The interface includes several search filters: "locate by Name" (checked), "locate by facility" (unchecked), "locate by dept" (unchecked), and "locate by Job Code" (unchecked). There are also radio buttons for "Sort Departments by" with options "Dept Code" and "Dept Name". A "List Learners" button is visible on the right. A red circle highlights a message that says "2 learners were added to your list".

A message displays at the top of the page telling you how many Learners were added.

**Note:** You can continue to add additional Learners from the search boxes above.

Click the 'Close' button in the upper right of the page when you're done.

# Selected Learners – Choose Training to Assign



From the menu bar, select **E-Learning – Assign Training To – Selected Learners**.

The 'Selected Learners' page opens and tells you how many Learners are attached to the list. The example below shows that 7 Learners are attached to the list.

To see the names, click the **"Manage My List"** button, also from 'Manage My List', you can add and remove names after clicking 'Manage My List' and choosing from the buttons in the upper right corner – remove selected, remove all, and add learners.

Select a module from either the drop-down for **Modules your Department Created** or the drop-down for **Modules available to Everyone**.

Click on either the **Assign Now** or **Assign Later** button.

Optional. If you want to see all the lessons in the module, you can click the **View** button.

Optional. If you want to edit the module and lesson properties or delete lessons from the module, click the **Edit** button.

Click either the **Assign Now** or **Assign Later** button.

**Assign Now** – Adds the selected module in the Learner’s lesson plan immediately.

**Assign Later** – Adds the module in a “holding area” that keeps the module off the Learner’s lesson plan until the Learner has 3 or less incomplete lessons in his/her lesson plan. The next time a Learner logs in the module in the holding area will be assigned.

**Note:** If you use **Assign Later** the lessons do not appear until the next time a Learner logs in. If they have completed all the lessons in their lesson plan and they think they have completed their training they may not log in again and will not receive the next module.

If you selected the ‘Assign Now’ button, you receive a popup to make the assignment and send email to the Learner(s). Click **OK** if you want to send the assignment and the email. OR, click **Cancel** if you only want the assignment made no email will be sent. You do not get the option to send the email elect to assign the module later.

From the ‘Assign Module to Select List’ popup opens. Either assign the lessons to ALL Learners listed, or select individual Learner names using the checkboxes to the left, then click the **Assign Module** button in the upper right.

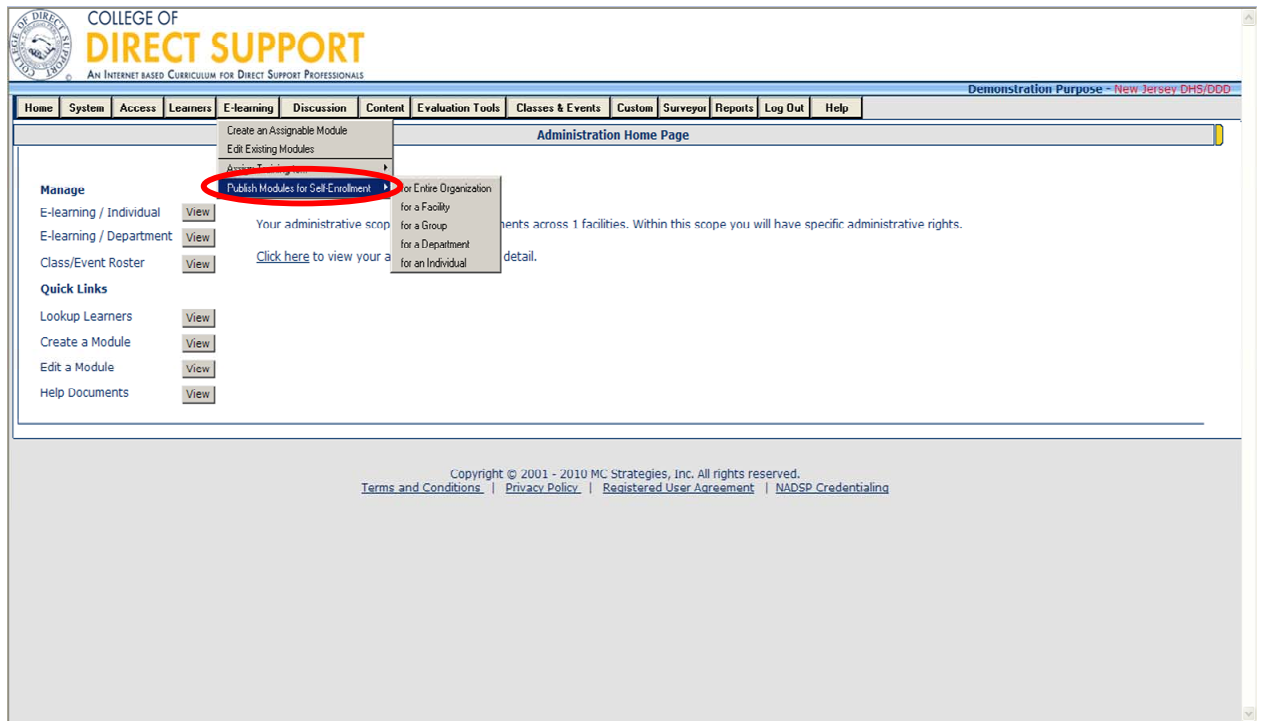
The names list in alphabetical order that were assigned the module.

Then close window to return to the ‘Manage E-Learning – Selected Learner’ page.

# E-Learning: Allowing for Learner Self Enrollment



# E-Learning – Publish Modules for Self-Enrollment



The LMS allows you to add self-enrollment lessons for your Learners. Self-enrollment allows the Learners the option to take a module of lessons or select individual lessons from within the module. This is convenient for you because it allows you to make training available to a defined demographic of Learners but not actually assign the training. This is useful for training that may not be mandatory but should be made available for Learners to educate themselves or get extra credit.

Click **E-Learning – Publish Modules for Self-Enrollment**.

Select a publishing scope. This is the ‘scope’ of publication for the module (e.g., department). If you want everyone in a given facility to have the option to enroll in a module, you would click “for a Facility. Or, you only want the module to be available to a specific department then you would select “for a Department,” and so on.

# E-Learning – Publish Modules for Self-Enrollment

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose – New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

**Publish E-learning Modules**

**Publish Modules for a Department**

Select a facility from the list. You will be presented with a list of departments in that facility. Choose a department from the list and click **Select Department**.  
*Only facilities and departments included in your administrative scope will be displayed.*

**Facilities:** 01 - New Jersey DHS/DDD

**Departments:** All Departments

**Module Selection**

Select the module you wish to publish from the list below. Click **View** to see the lessons contained in the module. Click **Publish** to designate the module for self enrollment by anyone in the department.

There are no local modules available for you to select.

**Global Modules:**

Modules published for facility: New Jersey DHS/DDD - Dept: Boggs Center CDS Administrator

*There are no modules published for self enrollment by this department*

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Depending on the publishing option you selected (e.g., for a Department”) you next must define the demographics of the Learners you want to have the ability to self-enroll using a series of drop-down menus.

Before publishing you may also view the lessons that are in a module. Select the module to be published from one of the drop-down menus. You can select a module from ‘Local Modules’ and ‘Global Modules,’ then click either “**View**” button to see the lessons in the selected module.

Click the “**Publish**” button to the right of the select module.

The module displays at the bottom of the page with the name of the module, the publishing date and time, and a “Remove” button.

# Additional Helpful Tools

# Announcements

# Manage Announcements



As an Administrator you can create announcements and then assign them to your Learners. You can manage the start date and end date for each announcement as well as edit, copy and delete announcements as needed.

# Manage Announcements

Type	Priority	Acknowledgement	Announcement	Active	Inactive	Start Date	Expires	
Announcements	!	✓	<a href="#">Save the Date - Direct Support Professionals Week</a>	0	0	8/25/2010	9/18/2010	Copy X Delete Print

Once you create the announcement you can assign the announcement to one or more of your Learners, facilities, departments or all Learners.

Announcements have a start date that the each announcement was sent to the assigned Learners and a date set to expire each announcement.

You can view your announcements three ways. By default the announcements display only the active (current) announcements. You can also view 'All' or "Expired." "All" includes both expired and active announcements and "Expired" includes only expired announcements.

**Tip:** When an announcement expires, it automatically removes from the Learner's list of announcements.

# Add New Announcements

Here you can create, edit, and assign announcements. An announcement will not be viewable by a learner until it has been published. Once published, an announcement's properties cannot be changed. You can only extend the end date and add new assignments to a published announcement. [Return to Announcements List](#)

Title:  Starting Date:  Expiration Date:

**Announcement Properties**

High Importance  Acknowledgement Required  
 Persistent *Note: Persistent announcements will always remain visible to assigned learners regardless of the announcement expiration date.*

Announcement Type:  [Add/Edit Announcement Types](#) Acknowledgement Text:  [Add/Edit Acknowledgement Text](#)

Display announcement on:  
 LMS personal page  Imaging home page *Note: If acknowledgement is required, the announcement can only appear in one place.*

**Rich Text Editor:**

Paragraph Font Size Color  
 B I U abc x x  
 [Rich text editor toolbar icons]

[Rich text editor text area]

When you create an announcement you have the option to select a date the announcement is to display for the Learners (Start date), the date they the announcement is to expire from the Learners view (Expires date), write a title that informs the Learners what the announcement is about and add body text that gives more details about the announcement. The body text can be typed into an area that works like a typical word processor.

If you create an announcement with a current date, it's available for learners to see the next time each Learner in your group(s) logs on. You can also set the date to a future date so the announcement waits to run automatically on that date.

**Acknowledgements-** Administrators may require learners to acknowledge they read and understand the announcement. The acknowledgement will be documented on the learner's transcript.

Announcement Type - Administrators may add, edit or delete Announcement types Ex: General information, Meeting minutes, Practice Change.

**Tip:** If you have a similar existing announcement you might want to copy it and edit it instead of making a new announcement from scratch.

**Tip:** The text fields do not have a spell-checker.



# Add New – Example

Here you can create, edit, and assign announcements. An announcement will not be viewable by a learner until it has been published. Once published, an announcement's properties cannot be changed. You can only extend the end date and add new assignments to a published announcement. [Return to Announcements List](#)

**Title:**  **Starting Date:**  **Expiration Date:**

**Announcement Properties**

High Importance  Acknowledgement Required  
 Persistent *Note: Persistent announcements will always remain visible to assigned learners regardless of the announcement expiration date.*

**Announcement Type:**  [Add/Edit Announcement Types](#) **Acknowledgement Text:**  [Add/Edit Acknowledgement Text](#)

**Display announcement on:**

LMS personal page  Imaging home page *Note: If acknowledgement is required, the announcement can only appear in one place.*

Paragraph Font Size Color

**B** *I* U abc ~~X~~ ~~X~~

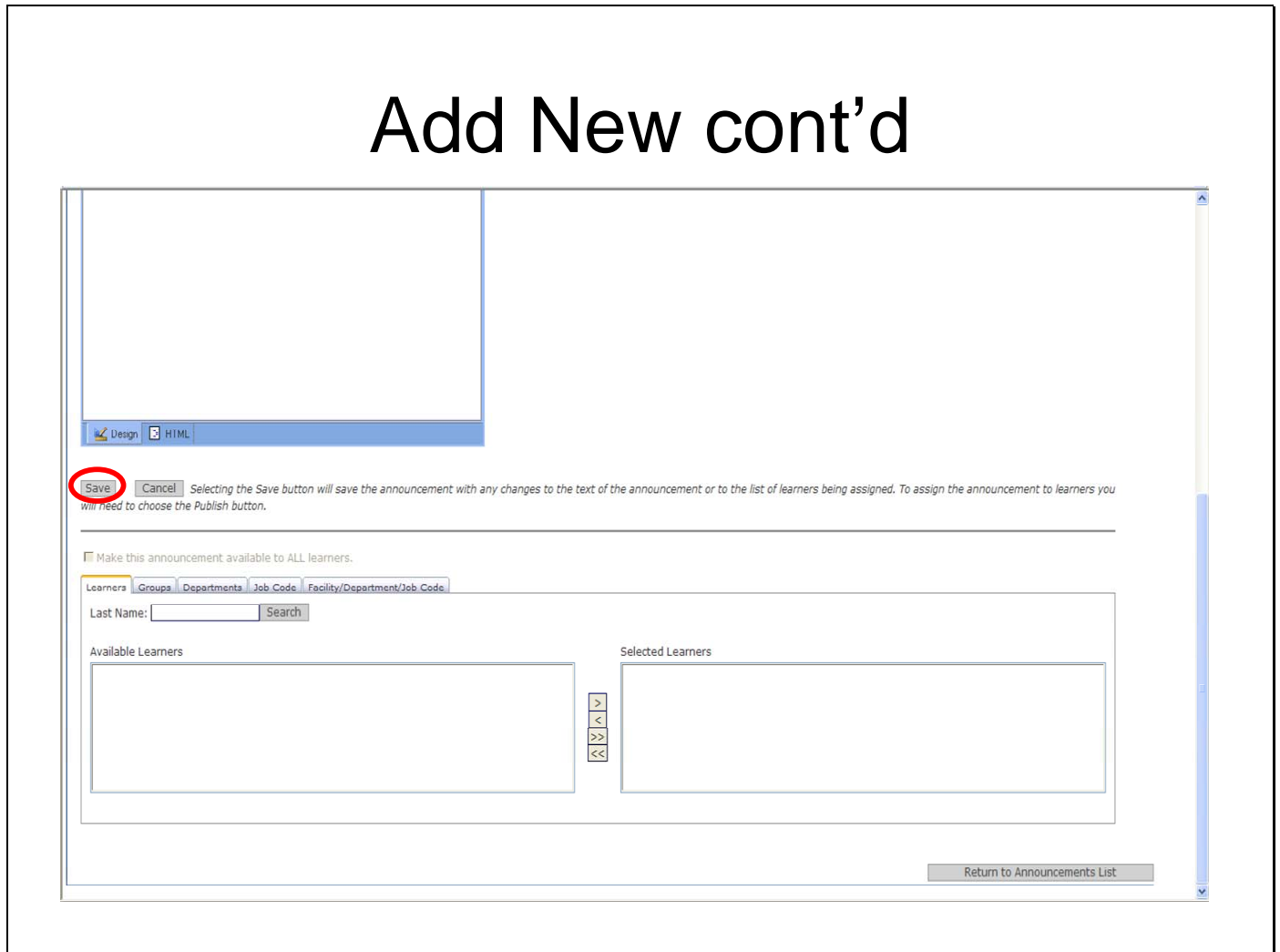
**It's Official! Senate Declares National DSP Recognition Week 2010**

On June 16, 2010, the U.S. Senate approved Resolution 558, designating the week beginning September 12, 2010, as "National Direct Support Professionals Recognition Week." Co-authors were Senators Nelson, Kerry, Brownback, Dodd, Bingaman, Johanns, Collins, Bunning, Carper, Brown of Ohio, and Udall of Colorado.

The resolution describes the important role of DSPs, the current situations of low wages and high turnover, and the need to attract more career-seekers to the direct support workforce.

Enter the **message** for the announcement using the word processing area as shown below. You can use the editing tools to format the content within the announcement (e.g., bold, italics, underline, font size).

# Add New cont'd



Click the **Save** button below.

You must save the announcement before you can publish it to learners.

You are now ready to assign Learners to the announcement.

# Announcement - Publish



Once you have created an announcement, you can assign it to all Learners, one or more individual Learners, one or more groups of Learners, or to the entire department.

All assignments are made from the 'Edit Announcement' page. You may need to scroll down the page to assign the announcement.

There are several buttons used to assign and unassign announcements between the left and right panes.

Move one or more selections to the left pane so they are not selected to receive an announcement. Move one or more selections from the left pane to the right pane where they are selected to receive an announcement. Move all items listed in the right pane to the left pane so they are not selected to receive an announcement. **Move all items listed in the left pane to the right pane where they are selected to receive an announcement.**

Whatever is added to the right pane (e.g., group name), receives the open announcement. More than one item may be listed on the right.

**Note:** To see the left and right panes, you must make sure that the “**make available to all**” checkbox is **not selected**. If it is selected, **remove the checkmark** from the checkbox with a click, then click OK to clear.

Click “**Update**” then “**Publish**”.

Click “Return to Announcements List to view your new announcement.

# Running Reports

Reporting tools effectively collect data on all aspects of learning by several different criteria. Reports can gather information by Facility, Department, Single Learner, Lesson, Module (Group of Lessons) and/or other criteria.

**Access to:**

Online Learning  
Classes & Events  
Ontrack  
Acknowledgments  
Discussion

# Reports

The screenshot shows the 'Administration Home Page' of the College of Direct Support. The page features a navigation menu at the top with items: Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Survey, Reports, Log Out, and Help. The 'Reports' menu is currently open, displaying a list of options: Online Learning, Classroom/Events, Ontrack, Acknowledgements, Discussions, Surveyor, and Admin Reports. The 'Online Learning' option is highlighted. The main content area includes sections for 'Manage' (with links for E-learning / Individual, E-learning / Department, and Class/Event Roster), 'Administrative Status Summary' (with a link to view administrative status detail), and 'Quick Links' (with links for Lookup Learners, Create a Module, Edit a Module, and Help Documents). The footer contains copyright information for MC Strategies, Inc. and links to Terms and Conditions, Privacy Policy, Registered User Agreement, and NADSP Credentialing.

Select **Reports** – **Online Learning**

# Reports – Online Learning

**Report Manager**

Select the report to run from those listed below by clicking on the link. If additional information is needed you will be prompted for it. Since you may want to print, the reports will not have any navigation links on them. Use the **Back** button in your browser to return to this page.

Report Type	Reports Available	Description
<a href="#">Facility Summary</a>	<b>Facility Summary</b>	Displays the assignment and completion summary data for each facility in your administration scope.
<a href="#">Group Summary Lessons Due</a>	<b>Group Summary Lessons Due</b>	Displays by learner within a group with incomplete lessons. Lists the total lessons assigned, complete, due and the percent complete.
<a href="#">Group Summary Lessons</a>	<b>Group Summary Lessons</b>	Displays by learner within a group with lessons. Lists the total lessons assigned, complete, due and the percent complete.
<b>Group Reports</b>	<a href="#">Group Summary by Facility</a>	Group Completion Summary by Facility
	<a href="#">Group Summary by Module</a>	Group Summary by Module.
	<a href="#">Group Summary Detail</a>	Group Summary Detail Report.
	<a href="#">Group Summary</a>	Summary report for one or more groups/modules assigned.

**IMPORTANT**  
The reports below require selection of a facility before they can be run. Please select a facility from those in the list.

Select a facility: Select a Facility

Current Facility Selected: None

<b>Department Reports</b>	<b>Department Summary Report</b>	Gives a completion status summary, by department, for all departments you manage.
	<b>Department Detail Report</b>	Details individual learner progress for each learner in a department.
<b>Learner Reports</b>	<b>Individual Lesson Progress</b>	Details the completion status of individual lesson items in a learner's lesson plan
	<b>Individual Lessons Due</b>	Details the lessons that are beyond the assigned completion date.
	<b>Individual Completion History</b>	Lists the scores for all lessons a learner has completed. This summary includes every score for each test taken.
	<b>Individual Test Summary</b>	Lists the score for the selected test, the question, the learner's answers and the correct answer.
<b>Classroom Events Reports</b>	<b>Individual Summary</b>	Lists a summary of the lesson plan assigned to a learner. Lessons that are incomplete and beyond assigned completion date are indicated with an * sign.
	<b>Department Completed Learners</b>	This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.

The Report Manager is the starting point for reports regarding online learning.

**Facility Summary** - Displays the assignment and completion summary data for each facility in your administration scope.

This report displays *Facility Name and Code, Total Learners Enrolled, Total Lessons Assigned, Total Lessons Completed, Percent Completed, and Credit Hours.*

Select a facility from the drop down menu and click **Select Facility (unless otherwise specified use New Jersey DHS/DDD...)**

# Reports – Online Learning- Department Reports

Select a facility: New Jersey DHS/DDD Select Facility

Current Facility Selected: **New Jersey DHS/DDD**

<b>Department Reports</b>	<b>Department Summary Report</b> <b>Department Detail Report</b>	<p>Gives a completion status summary, by department, for all departments you manage.</p> <p>Details individual learner progress for each learner in a department.</p>
<b>Learner Reports</b>	<b>Individual Lesson Progress</b> <b>Individual Lessons Due</b> <b>Individual Completion History</b> <b>Individual Test Summary</b> <b>Individual Summary</b>	<p>Details the completion status of individual lesson items in a learner's lesson plan</p> <p>Details the lessons that are beyond the assigned completion date.</p> <p>Lists the scores for all lessons a learner has completed. This summary includes every score for each test taken.</p> <p>Lists the score for the selected test, the question, the learner's answers and the correct answer.</p> <p>Lists a summary of the lesson plan assigned to a learner. Lessons that are incomplete and beyond assigned completion date are indicated with an * sign.</p>
<b>Classroom Events Reports</b>	<b>Department Completed Learners</b> <b>Department Enrolled Learners</b> <b>Event Attendance Listing</b>	<p>This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.</p> <p>This report will list all learners who have enrolled in a selected course and the date of the event they are scheduled to attend.</p> <p>This report will allow you to select a course and department to generate a list of learners who have attended events within a selected date range for that course.</p>
<b>Lesson Reports</b>	<b>Lesson Summary</b> <b>Instructor's Guide</b> <b>Test Analysis</b> <b>Test Score</b>  <b>Detail Summary</b>	<p>Details the total number of learners that have completed and the total number of learners that have not completed a lesson.</p> <p>Lists the test questions and the correct answers for a lesson.</p> <p>Shows the number of times each answer was chosen for each question in the test.</p> <p>Gives the individual scores for each learner who has taken the test and an overall average of the scores by department and by facility.</p> <p>Provides summary of completed learners, incomplete learners, percent complete and percent due. Click on the number of completed/incomplete learners for a detailed list of the learners by department.</p>
<b>Module Reports</b>	<b>Department Module Report</b> <b>Module Completed by Learner</b> <b>Module Due by Learner</b>	<p>Details the completion status of a module by department for all departments.</p> <p>Details by Learner, the module(s) that have been completed.</p> <p>Details by Learner, the module(s) that have not been completed.</p>
<b>Module Credited Hours</b>	<b>Credited Hours Report</b>	<p>Details the total hours credited for the modules for all learners.</p>



# Online Learning – Report Manager – Department Reports

**Department Reports**  
New Jersey DHS/DDD

1. Please enter the Time Period. If no time period is selected the report will pull all data available.

Start Date:   End Date:

2. Check "All Learners" to see all the learners in a department. If this is not selected, only learners with lessons assigned will appear on report.

Show all Learners

Sort Departments by  Dept Code  Dept Name

3. Choose a specific department or all departments.

All Department  
All Department  
CDSADMIN - Boggs Center CDS Administrator

4. Select one of the following reports:

Department Detail Report  
Department Summary Report  
\*Lessons Past Due by Department  
\*Lessons Due by Department  
\*Ontrack Learner Item Detail  
\*Show Learner by Dept.  
All Assignments

Select single department before running the All Assignments report.

\*Lessons Due and Lessons Past Due do not use Date Range specifications.

[Home/ Learner Reports/ Lesson Reports](#)

## Department Reports

Click on **Department Reports** link

Select a Time Period if desired - if no time period is selected the report will pull all available data.

Select the check box next to **Show all Learners** if desired. If chosen this will pull all learners in the database that meet the criteria you select, regardless if they have been assigned anything or not.

Choose a specific department from the list if desired, the default is **ALL DEPARTMENTS (You must find your dept./agency in this drop down)**

**Department Detail Report** - Details individual learner progress for each learner in a department. This includes total lessons assigned, total completed, completed this period and complete percentages and percentages still due. Department totals for each and a grand total for all departments listed, (If more than one)

**Department Summary Report** – Gives a completion status summary, by department, for all departments you manage. This includes total lessons, total completed, those completed this period and the percent completed for each department and a grand total.

**Lessons Past Due By Department** – Shows all learners in each department who have not completed lessons by their due date. Gives hire date (if available) lessons assigned, lessons due, lessons PAST due and the percent that are past due. Also gives totals for each department.

**Lessons Due By Department** - Shows all learners in each department who have not completed lessons Gives hire date (if available) lessons assigned, lessons due and the percent that are past due. Also gives totals for each department

**OnTrack Learner Item Detail** – Shows all OnTrack Items for learners in each department. This report gives all items for each learner, a description of each, the completion date, hours earned and any notes left by the facilitator.

**All Assignments** – Shows all learning for each learner. Separated by learner, everything assigned to each learner is listed, Online Lessons, Events, OnTrack Items or Evaluator items. It shows a description of each item, the scheduled date, the completed date, any hours or CEU's and has an Icon to denote which type of item it is.

**Note:** You will only be able to see the department (or facility) to which you have administrative access to.

# Reports – Online Learning – Learner Reports

Select a facility: New Jersey DHS/DDD

Current Facility Selected: **New Jersey DHS/DDD**

<b>Department Reports</b>	<b>Department Summary Report</b> <b>Department Detail Report</b>	<p>Gives a completion status summary, by department, for all departments you manage.</p> <p>Details individual learner progress for each learner in a department.</p>
<b>Learner Reports</b>	<b>Individual Lesson Progress</b> <b>Individual Lessons Due</b> <b>Individual Completion History</b> <b>Individual Test Summary</b> <b>Individual Summary</b>	<p>Details the completion status of individual lesson items in a learner's lesson plan</p> <p>Details the lessons that are beyond the assigned completion date.</p> <p>Lists the scores for all lessons a learner has completed. This summary includes every score for each test taken.</p> <p>Lists the score for the selected test, the question, the learner's answers and the correct answer.</p> <p>Lists a summary of the lesson plan assigned to a learner. Lessons that are incomplete and beyond assigned completion date are indicated with an * sign.</p>
<b>Classroom Events Reports</b>	<b>Department Completed Learners</b> <b>Department Enrolled Learners</b> <b>Event Attendance Listing</b>	<p>This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.</p> <p>This report will list all learners who have enrolled in a selected course and the date of the event they are scheduled to attend.</p> <p>This report will allow you to select a course and department to generate a list of learners who have attended events within a selected date range for that course.</p>
<b>Lesson Reports</b>	<b>Lesson Summary</b> <b>Instructor's Guide</b> <b>Test Analysis</b> <b>Test Score</b> <b>Detail Summary</b>	<p>Details the total number of learners that have completed and the total number of learners that have not completed a lesson.</p> <p>Lists the test questions and the correct answers for a lesson.</p> <p>Shows the number of times each answer was chosen for each question in the test.</p> <p>Gives the individual scores for each learner who has taken the test and an overall average of the scores by department and by facility.</p> <p>Provides summary of completed learners, incomplete learners, percent complete and percent due. Click on the number of completed/incomplete learners for a detailed list of the learners by department.</p>
<b>Module Reports</b>	<b>Department Module Report</b> <b>Module Completed by Learner</b> <b>Module Due by Learner</b>	<p>Details the completion status of a module by department for all departments.</p> <p>Details by Learner, the module(s) that have been completed.</p> <p>Details by Learner, the module(s) that have not been completed.</p>
<b>Module Credited Hours</b>	<b>Credited Hours Report</b>	<p>Details the total hours credited for the modules for all learners.</p>

# Online Learning – Report Manager – Learner Reports

The screenshot displays the 'Learner Reports' interface. At the top, it says 'Learner Reports' and provides instructions: 'To run a report, locate the learner you want to see a report for, then select the report to run. Use Search to locate the learners alphabetically by last name.' Below this, there are two main sections:

- 1. Locate the learner you want to report on.** This section includes a search field with a 'Search' button and a list of learners under the heading 'Last, First MI - Dept.'. The first two entries are 'example, demo - CDSADMIN', with the second one selected (highlighted in green).
- 2. Select the report you want to view or print from those listed below:** This section lists several report options, each with a description and a button:
  - Learning Summary:** Transcript summary of all learning (online, events and other). Includes an unchecked checkbox for 'Include date range'.
  - Learning Due:** Transcript summary of all learning (online, events and other) due.
  - Lesson Progress:** Details the completion status of individual lesson items in a learner's lesson plan.
  - Lessons Due:** Details the lessons that are beyond the assigned completion date.
  - Completion History:** Lists the scores for all lessons a learner has completed. This summary includes every score for each test taken.
  - Testing Summary:** Lists the score for the selected test, the question, the learner's answers and the correct answer.
  - Completion Summary:** Lists a summary of the lesson plan assigned to a learner. Lessons that are incomplete are indicated with an \* sign.

At the bottom of the interface, there is a breadcrumb trail: [Home/ DepartmentReports/ LessonReports](#).

## Learner Reports

Select a facility from the drop down menu and click **Select Facility**

Click on **Learner Reports** link

Search for a learner by typing their last name in the search field and then clicking **Search**.

Click the radial button to the left of the learner you want

Then click report you want to view or print:

**Learning Summary** - Shows all assigned to each learner. Shows Online Lessons, Events, OnTrack Items or Evaluator items. It shows a description of each item, the scheduled date, the completed date, test scores, any hours or CEU's and has an Icon to denote which type of Item it is.

**Learning Due** – Shows all lessons, Events, OnTrack Items and Evaluator items assigned to a learner that have not yet been completed. Gives a description for each, the scheduled date and has an icon to denote which type of item it is.

**Lesson Progress** – Shows completion Status of individual lesson items for a selected learner. This report gives the lesson name, start and complete date, scores and credits. Also gives total credits earned.

**Lessons Due** – Shows all lessons incomplete past a selected completion date. If the date field is left blank this report will pull all incomplete lessons.

**Completion History** – This report shows all tests taken by the learner for lessons the learner has successfully completed. This gives the lesson name, the Test Date and time, and the score. If the learner takes the test more than one time it will have an entry for each attempt- also gives an average of all tests.

**Testing Summary** – Displays test questions with the answers given by the selected Learner. All instances of a test appear.

**Completion Summary** – Focuses on the total number of lessons assigned, completed and due.

# Reports – Online Learning – Classroom Events Reports

Select a facility:

Current Facility Selected: **New Jersey DHS/DDD**

<b>Department Reports</b>	<b>Department Summary Report</b> <b>Department Detail Report</b>	<p>Gives a completion status summary, by department, for all departments you manage.</p> <p>Details individual learner progress for each learner in a department.</p>
<b>Learner Reports</b>	<b>Individual Lesson Progress</b> <b>Individual Lessons Due</b> <b>Individual Completion History</b> <b>Individual Test Summary</b> <b>Individual Summary</b>	<p>Details the completion status of individual lesson items in a learner's lesson plan</p> <p>Details the lessons that are beyond the assigned completion date.</p> <p>Lists the scores for all lessons a learner has completed. This summary includes every score for each test taken.</p> <p>Lists the score for the selected test, the question, the learner's answers and the correct answer.</p> <p>Lists a summary of the lesson plan assigned to a learner. Lessons that are incomplete and beyond assigned completion date are indicated with an * sign.</p>
<b>Classroom Events Reports</b>	<b>Department Completed Learners</b> <b>Department Enrolled Learners</b> <b>Event Attendance Listing</b>	<p>This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.</p> <p>This report will list all learners who have enrolled in a selected course and the date of the event they are scheduled to attend.</p> <p>This report will allow you to select a course and department to generate a list of learners who have attended events within a selected date range for that course.</p>
<b>Lesson Reports</b>	<b>Lesson Summary</b> <b>Instructor's Guide</b> <b>Test Analysis</b> <b>Test Score</b>  <b>Detail Summary</b>	<p>Details the total number of learners that have completed and the total number of learners that have not completed a lesson.</p> <p>Lists the test questions and the correct answers for a lesson.</p> <p>Shows the number of times each answer was chosen for each question in the test.</p> <p>Gives the individual scores for each learner who has taken the test and an overall average of the scores by department and by facility.</p> <p>Provides summary of completed learners, incomplete learners, percent complete and percent due. Click on the number of completed/incomplete learners for a detailed list of the learners by department.</p>
<b>Module Reports</b>	<b>Department Module Report</b> <b>Module Completed by Learner</b> <b>Module Due by Learner</b>	<p>Details the completion status of a module by department for all departments.</p> <p>Details by Learner, the module(s) that have been completed.</p> <p>Details by Learner, the module(s) that have not been completed.</p>
<b>Module Credited Hours</b>	<b>Credited Hours Report</b>	<p>Details the total hours credited for the modules for all learners.</p>

# Online Learning – Report Manager – Department Completed Learners

Department Reports  
New Jersey DHS/DDD

1. Please enter the Time Period you require the reports for

Start Date: End Date:

2. Select department to run report:  
All Department

3. Select Course:  
All courses

Completed Learners

## Department Completed Learners

Enter Time Frame

Select **Department** fro Drop Down menu

Choose **Course Code** from Drop Down menu

This report displays Department, Code Name, Course Code, Learner Name, Learner ID, Start Date and any credits, contact hours or CEUs for learners in Events that meet the criteria selected.

# Online Learning –Report Manager – Department Enrolled Learners

The screenshot shows a web interface titled "Classroom Enrolled Learners By Department". It contains three main sections: 1. "Please enter the Time Period. If no time period is selected the report will pull all data available." with "Start Date:" and "End Date:" labels and two date pickers. 2. "Choose a department." with a dropdown menu currently showing "All Departments". 3. "Choose a Course" with a dropdown menu currently showing "All courses" and a "Submit Query" button to its right.

## **Classroom Enrolled Learners by Department**

Enter Start and End Dates

Choose a department

And then choose a course

Click **“Submit Query”**



# Online Learning – Report Manager – Event Attendance Listing

The screenshot shows a web application interface titled "Welcome to the Course Attendance Manager". It contains several sections for user input:

- Please select the course listing for which you would like to generate an attendance report**: A dropdown menu labeled "Course List" with the selected value "Becoming an Effective Mentor - Mentor101".
- Please select the Facility for which you would like to generate an attendance report**: A dropdown menu labeled "Facility List" with the selected value "New Jersey DHS/DDD".
- Please select the department for which you would like to generate an attendance report**: A dropdown menu labeled "Department List" which is currently empty.
- Please select the criteria**: Two radio button options. The first is selected: "Learners by current facilityCode and department". The second is "Learners by Facilitycode and department at the time of the event".
- Please enter a date range for the report:**: Two date input fields. The first is labeled "Start Query Date:" and the second is labeled "End Query Date:". Both fields have a calendar icon to their right.
- Click here to generate report ->**: Two buttons, "Generate Report" and "Reset".

At the bottom center of the page, there is a small copyright notice: "Copyright - 2004 | Webservice".

## **Event Attendance Listing**

Choose a **course** from the dropdown Course List

Select a **facility** from the Facility List

Choose a **department** from the dropdown list (If Desired)

Choose **List learners by Current Facility Code and Department** or **Learners by Facility Code and Department at the time of the event.**

Choose **Date Range**

Click **Generate Report**

This will give the totals of learners for the criteria selected that Completed the course, Are still incomplete or were no shows. The Totals are clickable Hyperlinks that will take you to a list of the learners.

# Reports – Online Learning – Lesson Reports

The screenshot shows a web interface for report management. At the top, there is a 'Select a facility:' dropdown menu with 'New Jersey DHS/DDD' selected and a 'Select Facility' button. Below this, it says 'Current Facility Selected: New Jersey DHS/DDD'. The main content area is a table of reports, organized into categories on the left:

- Department Reports:**
  - Department Summary Report: Gives a completion status summary, by department, for all departments you manage.
  - Department Detail Report: Details individual learner progress for each learner in a department.
- Learner Reports:**
  - Individual Lesson Progress: Details the completion status of individual lesson items in a learner's lesson plan.
  - Individual Lessons Due: Details the lessons that are beyond the assigned completion date.
  - Individual Completion History: Lists the scores for all lessons a learner has completed. This summary includes every score for each test taken.
  - Individual Test Summary: Lists the score for the selected test, the question, the learner's answers and the correct answer.
  - Individual Summary: Lists a summary of the lesson plan assigned to a learner. Lessons that are incomplete and beyond assigned completion date are indicated with an "X" sign.
- Classroom Events Reports:**
  - Department Completed Learners: This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.
  - Department Enrolled Learners: This report will list all learners who have enrolled in a selected course and the date of the event they are scheduled to attend.
  - Event Attendance Listing: This report will allow you to select a course and department to generate a list of learners who have attended events within a selected date range for that course.
- Lesson Reports (circled in red):**
  - Lesson Summary: Details the total number of learners that have completed and the total number of learners that have not completed a lesson. Lists the test questions and the correct answers for a lesson.
  - Instructor's Guide: Shows the number of times each answer was chosen for each question in the test.
  - Test Analysis: Gives the individual scores for each learner who has taken the test and an overall average of the scores by department and by facility.
  - Test Score: Provides summary of completed learners, incomplete learners, percent complete and percent due. Click on the number of completed/incomplete learners for a detailed list of the learners by department.
  - Detail Summary: (No description provided)
- Module Reports:**
  - Department Module Report: Details the completion status of a module by department for all departments.
  - Module Completed by Learner: Details by Learner, the module(s) that have been completed.
  - Module Due by Learner: Details by Learner, the module(s) that have not been completed.
- Module Credited Hours:**
  - Credited Hours Report: Details the total hours credited for the modules for all learners.

The Lesson reports contain completion information by lesson including scores for individual Learners as well as test questions and correct answers for each lesson.

**Note:** From the Report Manager you must first **select a Facility** and click the **Select Facility** button.

## Steps to Run Any of the 'Lesson Reports'

Click **Reports – Online Learning** – the Report Manager opens.

Scroll down to 'Select a Facility drop-down, **select a Facility** – click the **Select Facility** button.

Scroll-down, and click **Lesson Reports**.

Enter any part of the lesson name. OR, you can click the radio button to the left of the lesson you want to run the report for. Use the Next button on the bottom to display more lessons.

**Tip:** You can list all lessons by leaving the search box blank and then click Go.

Click the **Go** button.

Click the radio button of the lesson you want to run the reports for.

Click one of the report buttons:

**Summary Report** – You can view two totals: the total the number of Learners that complete the selected lesson and the total number of Learners that have not completed the selected lesson.

**Instructors Guide** – You can view the test questions and the correct answers for the selected lesson.

**Test Analysis** – You can view the number of times each answer was selected for each question in the test. You can set a date range for this report.

**Test Score** – You can view individual Learner scores for each Learner that has taken the test as well as an overall average of scores by department and by facility.

**Detail Summary** – You can view Learners that have completed and Learners that did not complete the selected lesson, percent complete and percent due.

You can also click the total number due for a detailed list of the name of each Learner for Complete date and score by department.

**Tip:** To close an open report and keep the Report Manager open, click the **Back** button on your browser as many times as needed to return to the Report Manager menu.

# Reports – Online Learning Module Reports

Category	Report Name	Description
Department Reports	Department Summary Report	Gives a completion status summary, by department, for all departments you manage.
	Department Detail Report	Details individual learner progress for each learner in a department.
Learner Reports	Individual Lesson Progress	Details the completion status of individual lesson items in a learner's lesson plan
	Individual Lessons Due	Details the lessons that are beyond the assigned completion date.
	Individual Completion History	Lists the scores for all lessons a learner has completed. This summary includes every score for each test taken.
	Individual Test Summary	Lists the score for the selected test, the question, the learner's answers and the correct answer.
	Individual Summary	Lists a summary of the lesson plan assigned to a learner. Lessons that are incomplete and beyond assigned completion date are indicated with an * sign.
Classroom Events Reports	Department Completed Learners	This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.
	Department Enrolled Learners	This report will list all learners who have enrolled in a selected course and the date of the event they are scheduled to attend.
	Event Attendance Listing	This report will allow you to select a course and department to generate a list of learners who have attended events within a selected date range for that course.
Lesson Reports	Lesson Summary	Details the total number of learners that have completed and the total number of learners that have not completed a lesson.
	Instructor's Guide	Lists the test questions and the correct answers for a lesson.
	Test Analysis	Shows the number of times each answer was chosen for each question in the test.
	Test Score	Gives the individual scores for each learner who has taken the test and an overall average of the scores by department and by facility.
	Detail Summary	Provides summary of completed learners, incomplete learners, percent complete and percent due. Click on the number of completed/incomplete learners for a detailed list of the learners by department.
Module Reports	Department Module Report	Details the completion status of a module by department for all departments.
	Module Completed by Learner	Details by Learner, the module(s) that have been completed.
	Module Due by Learner	Details by Learner, the module(s) that have not been completed.
Module Credited Hours	Credited Hours Report	Details the total hours credited for the modules for all learners.

The Module reports focus on lesson completion by module. All these reports can be exported to Excel.

The reports below the Group Reports require you to **first select a Facility to get started**, and click the **Select Facility** button.

**Department Module Report** – Focuses on completion status of lessons in a module by department. Totals display by department; however, you can drill-down to more specific information (e.g., list of all lessons in the module, list of learners assigned the module).

**Module Completed by Learner** – Focuses on all lessons from the module that have been completed.

**Module Due by Learner** – Focuses on Learners who have not completed a module. It includes both modules where due dates are in the future and those that are past due.

**Module Past Due by Learner** – Focuses only on Learners where modules are past due.

### **Steps to Open and Select a Module Report**

Click **Reports – Online Learning** – the Report Manager opens.

Scroll down to ‘Select a Facility drop-down (below IMPORTANT), **select a Facility** – click the **Select Facility** button.

Scroll-down, and click **Module Reports**.

A new page opens up.

Optional. Date range for the report. If you don’t select a date range, it returns all results.

Click the ‘Start Date’ calendar for the report and select a date for the start of the time period.

Click the ‘End Date’ calendar for the report and select a date for the end of the time period.

From the scrolling text box, select a module. (or you can select ‘All Modules’)

You are now ready to select from the reports listed below.

# Reports – Online learning – Module Credited Hours

<b>Classroom Events Reports</b>	<a href="#">Department Completed Learners</a>	indicated with an  sign. This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.
	<a href="#">Department Enrolled Learners</a>	This report will list all learners who have enrolled in a selected course and the date of the event they are scheduled to attend.
	<a href="#">Event Attendance Listing</a>	This report will allow you to select a course and department to generate a list of learners who have attended events within a selected date range for that course.
<b>Lesson Reports</b>	<b>Lesson Summary</b>	Details the total number of learners that have completed and the total number of learners that have not completed a lesson.
	<b>Instructor's Guide</b>	Lists the test questions and the correct answers for a lesson.
	<b>Test Analysis</b>	Shows the number of times each answer was chosen for each question in the test.
	<b>Test Score</b>	Gives the individual scores for each learner who has taken the test and an overall average of the scores by department and by facility.
	<b>Detail Summary</b>	Provides summary of completed learners, incomplete learners, percent complete and percent due. Click on the number of completed/incomplete learners for a detailed list of the learners by department.
<b>Module Reports</b>	<b>Department Module Report</b>	Details the completion status of a module by department for all departments.
	<b>Module Completed by Learner</b>	Details by Learner, the module(s) that have been completed.
	<b>Module Due by Learner</b>	Details by Learner, the module(s) that have not been completed.
<b>Module Credited Hours</b>	<b>Credited Hours Report</b>	Details the total hours credited for the modules for all learners.
<b>Archive Report</b>	<b>Archive Report</b>	Lists archived history for a specified learner.
<b>Program Reports</b>	<b>Program Summary</b>	Program completion summary for a selected program.
	<b>Program Summary - Department</b>	Program summary by department.
	<b>Program Summary - Incomplete Learners</b>	Program listing of all learners who have not completed the selected program training.
	<b>Program Summary - Incomplete by Facility</b>	Program listing of all learners who have not completed the selected program training, by Facility.
<b>Administrator Applications</b>	<a href="#">Group Scan Manager</a>	Allows administrators to manage groups.
	<a href="#">Awaiting Module Assignment List</a>	Allows System Administrator to view modules awaiting assignments.

This report displays credit hours where available to all Learners by module. It shows the Learner's Name, Department and Module Name. And includes if applicable, Start Date, Complete Date and Total Hours. If the module is completed, the column displays a 'Y' and if not completed it displays an 'N'.

## Steps to Run the 'Credited Hours Report' for Modules

Click **Reports – Online Learning** – the Report Manager opens.

Scroll down to 'Select a Facility drop-down, **select a Facility** – click the **Select Facility** button.

Scroll-down, and click **Module Credited Hours** report.

# Reports – Online Learning – Archive Report

Classroom Events Reports	<a href="#">Department Completed Learners</a>	indicated with an "S" sign. This report allows you to select a classroom event course title to list all learners who have completed the course based on selected departments.
	<a href="#">Department Enrolled Learners</a>	This report will list all learners who have enrolled in a selected course and the date of the event they are scheduled to attend.
	<a href="#">Event Attendance Listing</a>	This report will allow you to select a course and department to generate a list of learners who have attended events within a selected date range for that course.
Lesson Reports	<a href="#">Lesson Summary</a>	Details the total number of learners that have completed and the total number of learners that have not completed a lesson.
	<a href="#">Instructor's Guide</a>	Lists the test questions and the correct answers for a lesson.
	<a href="#">Test Analysis</a>	Shows the number of times each answer was chosen for each question in the test.
	<a href="#">Test Score</a>	Gives the individual scores for each learner who has taken the test and an overall average of the scores by department and by facility.
	<a href="#">Detail Summary</a>	Provides summary of completed learners, incomplete learners, percent complete and percent due. Click on the number of completed/incomplete learners for a detailed list of the learners by department.
Module Reports	<a href="#">Department Module Report</a>	Details the completion status of a module by department for all departments.
	<a href="#">Module Completed by Learner</a>	Details by Learner, the module(s) that have been completed.
	<a href="#">Module Due by Learner</a>	Details by Learner, the module(s) that have not been completed.
<a href="#">Module Credited Hours</a>	<a href="#">Credited Hours Report</a>	Details the total hours credited for the modules for all learners.
<a href="#">Archive Report</a>	<a href="#">Archive Report</a>	Lists archived history for a specified learner.
Program Reports	<a href="#">Program Summary</a>	Program completion summary for a selected program.
	<a href="#">Program Summary - Department</a>	Program summary by department.
	<a href="#">Program Summary - Incomplete Learners</a>	Program listing of all learners who have not completed the selected program training.
	<a href="#">Program Summary - Incomplete by Facility</a>	Program listing of all learners who have not completed the selected program training, by Facility.
Administrator Applications	<a href="#">Group Scan Manager</a>	Allows administrators to manage groups.
	<a href="#">Awaiting Module Assignment List</a>	Allows System Administrator to view modules awaiting assignments.

You can retrieve archived lesson data for either active or inactive Learners using this report. If you select 'archive', you can display all archived lessons along with due date complete date, scores, number of credits and the provider. There is also summary information (e.g., total number of lessons assigned) at the bottom of the report.

After you open the Report Manager, you need to move below the Group Reports to **select a Facility to get started.**

## Steps to Open a Learner's Archived Report

Click **Reports – Online Learning** – the Report Manager opens.

Scroll down to 'Select a Facility drop-down, **select a Facility** – click the **Select Facility** button.

Scroll-down the page, click **Archive Report**.

A page opens with directions for using the report.

Enter the **Learner ID**, you can type this, or use the **Select Learner** button on the right to find a specific Learner.

From the right of the Learner ID, select **Archive** if not selected.

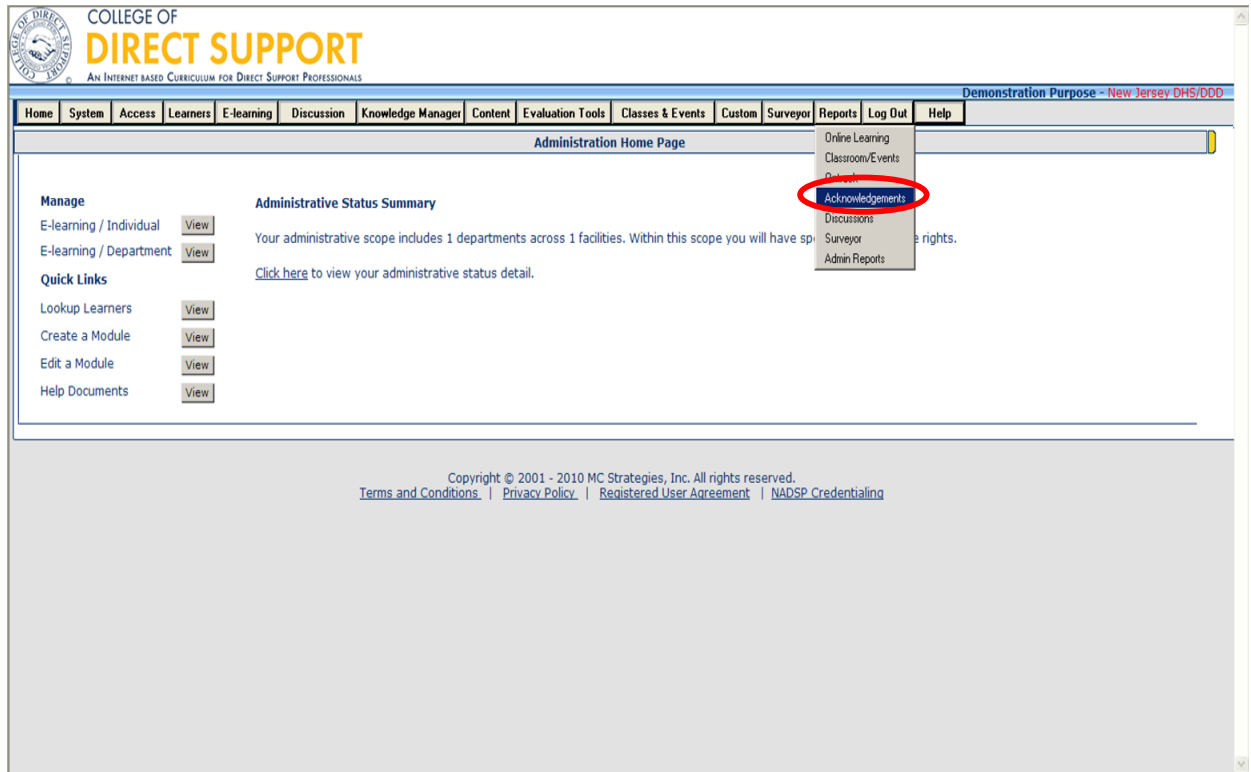
From the 'Select Department' drop-down, click a department, if you do not select a department the default is **All Departments**.

Click the **Report** button.

The archived history opens for the specified Learner, and summary information displays across the bottom of the report.



# Reports – Acknowledgements



Reports - Acknowledgements lists all Announcements that require acknowledgements.

You open the Acknowledgments Report from the Reports menu on the Administrator home page. You can select from a Facility and all or one of the Department in that facility.

Acknowledgements display by announcement name for all announcements that require an acknowledgment. The expiration date displays to the right of each announcement.

## Steps to Open the Acknowledgement Report

Click **Reports — Acknowledgements**

From the Facility drop-down, select a Facility for the report.

From 'Department' drop-down select either **one Department** or '**All**' departments.

Click the **Go** button.

The 'Acknowledgements Report' opens. From this report you can drill-down for more details from the following: title of Announcement, # Active Assigned, # Inactive Assigned, #Active Acknowledged, # Inactive Acknowledged, and # Active Due.

# Reports – Acknowledgements

Acknowledgements Report  
as of 8/26/2010

Facility:  Department:

<u>Announcement</u>	<u>Expiration Date</u>	<u># Active Assigned</u>	<u># Inactive Assigned</u>	<u># Active Acknowledged</u>	<u># Inactive Acknowledged</u>	<u># Active Due</u>
<a href="#">Meeting Tomorrow</a>	5/19/2009	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>
<a href="#">Beam me up Scotty</a>	5/19/2009	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>
<a href="#">Mandatory Staff Meeting on UIR procedures</a>	10/22/2008	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>	<a href="#">0</a>

It shows the number of learners it was assigned to the number acknowledged and the number due.

The numbers are hyper links to a detailed list of the learners.

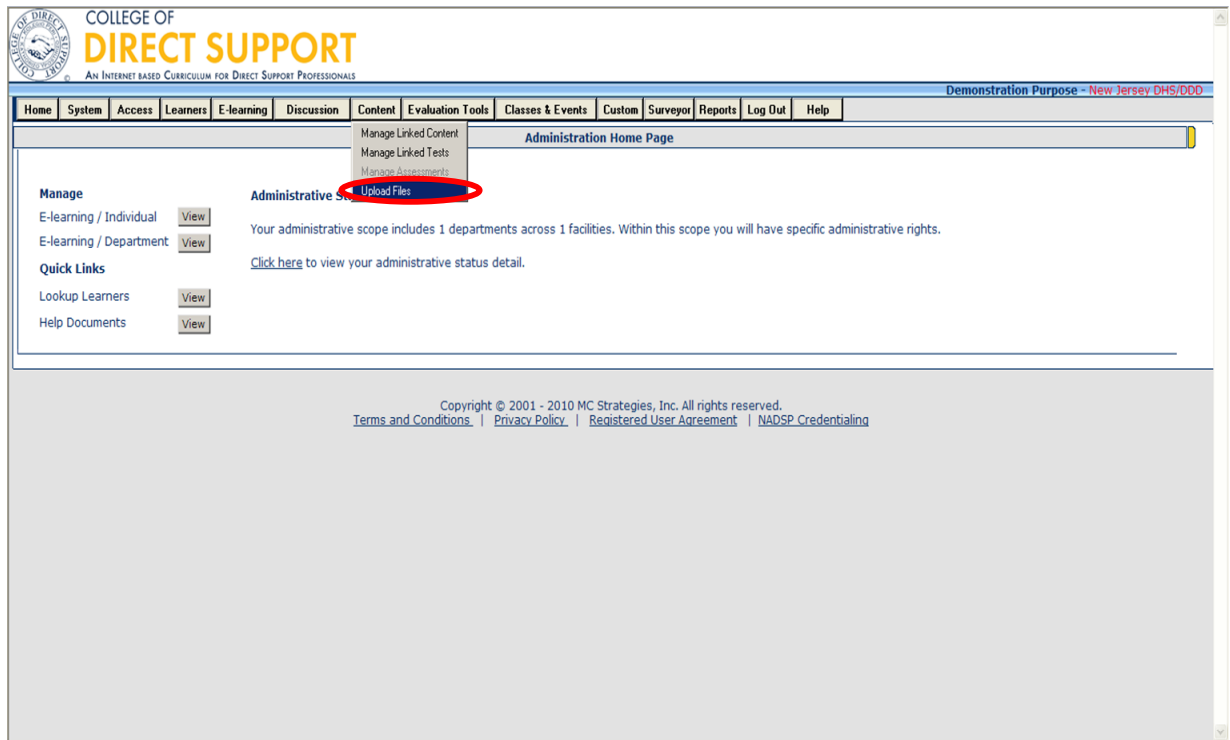
# **E-Learning: Adding Agency Specific Online Training to the CDS**

**Note: The name for the document you are linking to the CDS must start with the name of your agency, (i.e. Boggs Center Orientation). Linked content that do not follow the naming rule will be deleted by the System Administrator.**

It is very important that you decide where your document will be hosted, or stored. You will need to work with your System Administrator if you would like your document stored on MC Strategies' servers. Should you decide to store your document on your own servers, please make sure you note where the document is located. You'll have to know the URL (web address) where the file is saved.

Example: <http://www.yourwebaddress.org.com> etc or whatever link you have the web page stored in. Your IT department should be able to help you with this in the event you choose to store on your own page.

# Content – Upload Files



**\*Note: When uploading content to the system remember to name the lesson beginning with your agency's name (i.e. Boggs Center Orientation). Failure to adhere to the naming requirements will result in deletion of the posted class/event by the System Administrator.**

You can “upload” and “link” your own content/lessons (web based) using the Content Upload Files feature. This means you no longer need the assistance of Client Services to create the URL for linked lessons. Your lessons can be created in PowerPoint, Microsoft Word, or a web-authoring product you may already have (see the complete list below). Selecting Upload Files presents administrators the option to browse their desktop to upload a file to the MCS server for use as a lesson in the LMS. The files upload from your computer to a MCStrategies FTP site.

## **What File Types (Content) You Can Upload**

The following is a list of allowed content file types: .txt, .ppt, .html, .pdf, .jpg, .gif, .doc, docx, .xls, .bmp, .png, .tiff, .swf, .CSV, .csvx, .wps, .xlsx, wav, .wmv, .mp3.

## ***Uploading Files and Modules***

You can upload one or more files and/or folders. You can also make folders (See 'Creating a New folder on the Remote System' later in this document) to organize your uploads on the FTP site as well as remove files from the FTP site.

**Tip:** Create folders to organize your uploaded content.

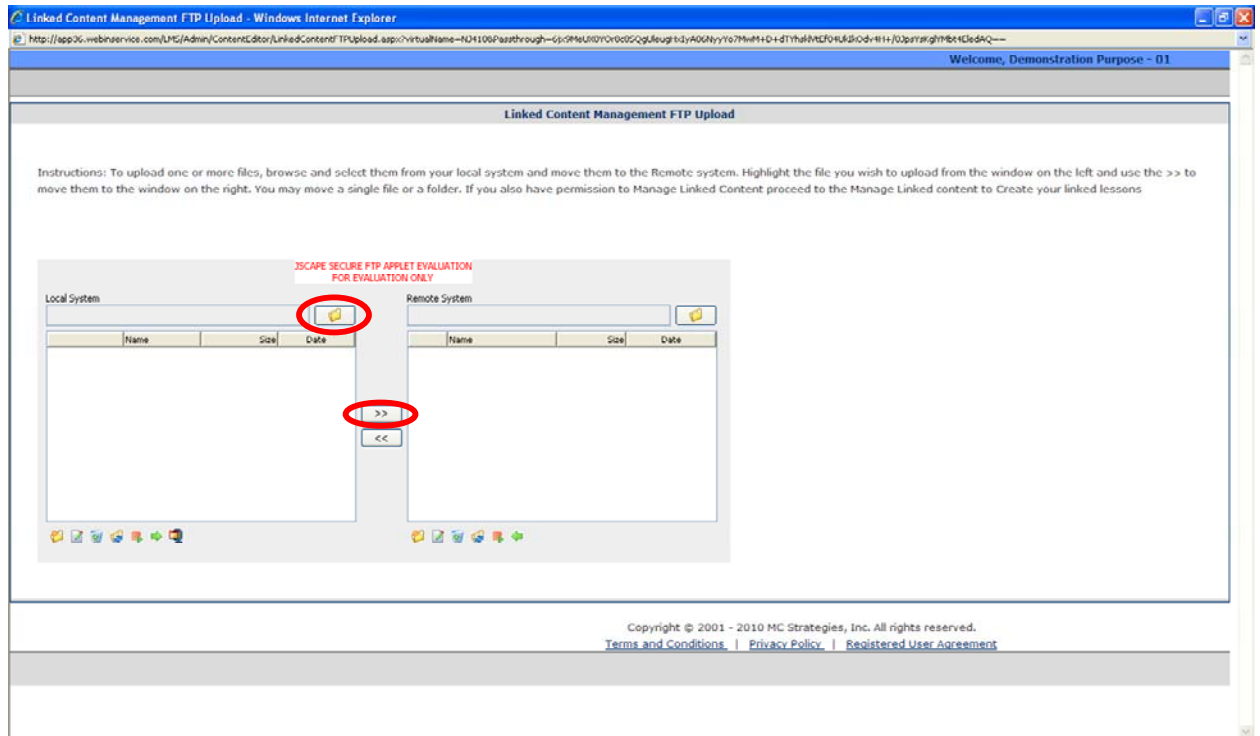
**Note:** You cannot remove linked content that has been assigned.

**Note:** After you upload your content, you must 'link' the content. Once linked, it can be added to a module.

## **Steps to Upload One or More Files**

Click **Content – Upload Files**. (The page may take several moments to load)

# Content – Linked Content – Upload



Click **"Browse"** button, and find the file/folder you want to upload

**Note:** Your folders and files list on the left. If you do not see the file you are looking for, you may need to open your folders. Or, if you need to move up one-level at-a-time, while searching for the file/folder, click the ".." and your search moves up one level.

After you find the file, **highlight the file**. Optional. If you want to upload more than one file at this time, browse for the additional files and select.

Click the Upload icon (a green arrow) below or the (double-arrows). The selected file(s)/folder(s) uploads to the remote site.

**IMPORTANT:** Now that the file/folder is uploaded, you must now manage the linked content by adding the new uploaded lesson(s) by naming the file/folder a lesson name a description of the lesson, and link to the uploaded file. See linked content information.

### **Creating a New Folder on the Remote System**

You can create folders to organize your uploads on the FTP site.

**Tip:** If you need to move up one-level at-a-time, while searching for the file/folder you want to upload, click the “..” and you search moves up one level.

From the ‘Remote System’ window on the right, **click anywhere on the right window** of the Remote System.

Click the **yellow folder (MKDIR)** from the lower left corner of the ‘Remote System’ window on the right.

A popup opens: ‘Create remote directory’.

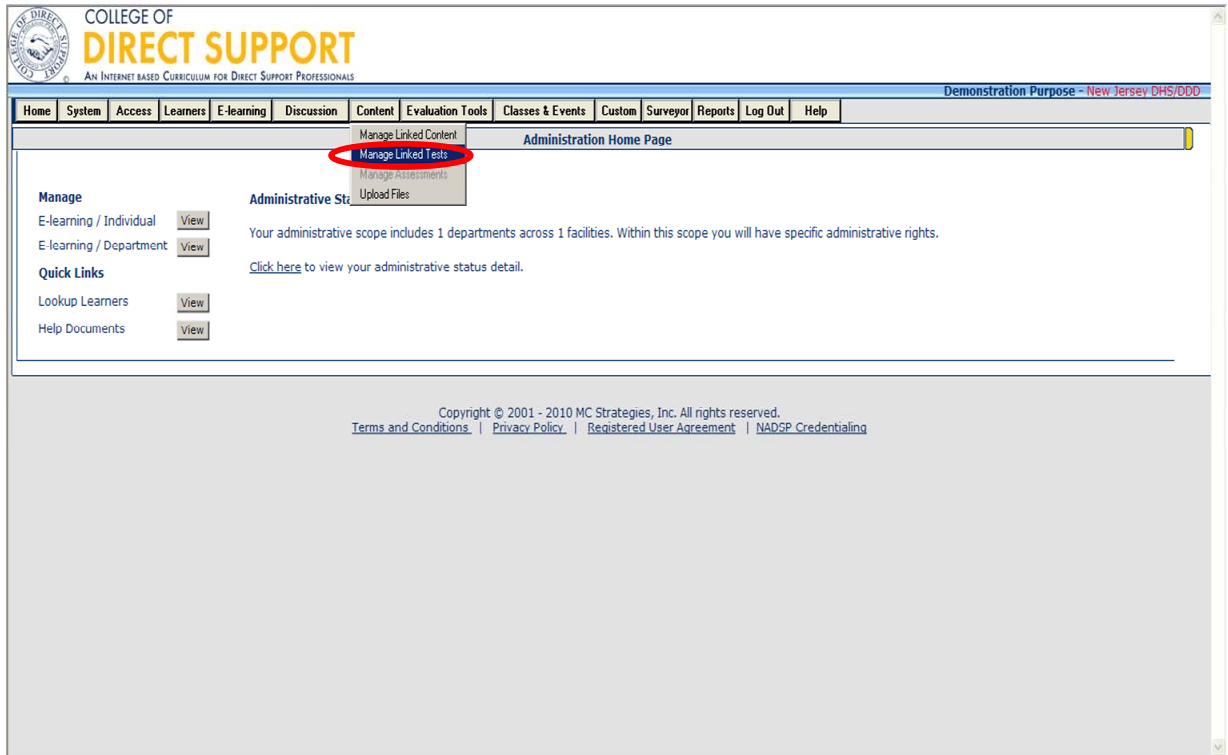
Enter the name for the new folder.

Click **OK**.

Click the **Upload** icon (green arrow) below or the (double-arrows)

You selected file/folder uploads to the remote site.

# Content – Manage Linked Tests



You can create tests to go with the lessons you want to link. These tests can be either multiple choice with either single answers or multiple answers (up to six answers on a single question) or true/false type questions.

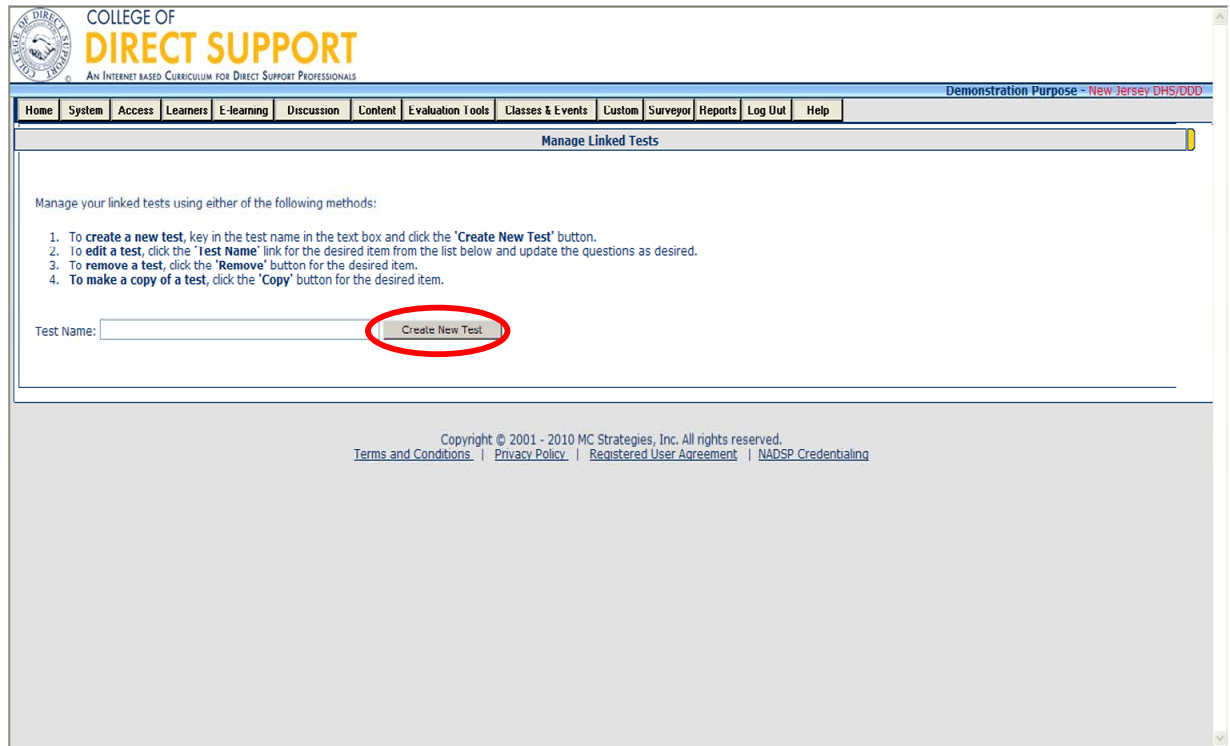
**\*Note: When creating tests remember to name the test beginning with your agency's name (i.e. Boggs Center Orientation Test). Failure to adhere to the naming requirements will result in deletion of the posted class/event by the System Administrator.**

**Note:** If you do not want to add a test to the Linked Content, move ahead to Manage Linked Content.

Select **Content — Manage Linked Tests** from the main menu.  
The 'Manage Linked Tests' page opens.



# Content – Manage Linked Tests



**Note:** The same naming rule applies when adding tests to the CDS, (i.e. Boggs Center Orientation Test). Tests in the system that do not follow the naming rule will be deleted by the System Administrator.

From 'Test Name' enter the **name** for the **test** (i.e. Boggs Center Orientation Test).

**Tip:** Consider titling the test the same as the lesson but also adding the word "**test**" to differentiate between the lesson name and the test name – they cannot be titled the same. (e.g., med surg\_test)

**Note:** If you attempt to save a new test with a name that already exists you will get a message stating "The name you selected already exists, please select another name".

Click "**Create New Test**". The name of your new test will be displayed on the list.

**Tip:** To list the test names alphabetically, click the column name 'Test Name'. And you can click the column name 'Created' to list the test names in numerical order.

# Content – Manage Linked Tests

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Demonstration Purpose - New Jersey DHS/DDD

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

### Manage Linked Tests

Manage your linked tests using either of the following methods:

1. To **create a new test**, key in the test name in the text box and click the 'Create New Test' button.
2. To **edit a test**, click the 'Test Name' link for the desired item from the list below and update the questions as desired.
3. To **remove a test**, click the 'Remove' button for the desired item.
4. To **make a copy of a test**, click the 'Copy' button for the desired item.

Test Name:

Test Name	Created		
<a href="#">Boggs Center Test</a>	10-28-2010	<input type="button" value="Remove"/>	<input type="button" value="Copy"/>

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Click the title's link for the new test (i.e. Boggs Center Test).

The Managed Linked Tests – Create Test Questions page will open.

# Content – Manage Linked Tests

COLLEGE OF DIRECT SUPPORT  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Home System Access Learners E-learning Discussion Content Evaluation Tools Classes & Events Custom Surveyor Reports Log Out Help

Demonstration Purpose - New Jersey DHS/DDD

Manage Linked Tests - Create Test Questions

Create Questions for: **Boggs Center Test**

Use this form to manage questions, answer choices, and answer rationales for the test you selected. This feature allows you to enter up to six answer choices, one or more correct answers, with optional use of answer rationale.

To add a question:

- Select the desired 'Question type' radio button. If you chose the default 'Multiple Choice', then you may optionally choose to mark the 'Multiple Answers' checkbox when you want to allow more than one answer to the multiple choice question. For 'Check all that apply' questions, the rationale for all responses is taken from a single rationale entry and all answers will be listed with this rationale. Click on the 'Select Type' button if you change your mind about the question type. The page will refresh and display answer choices based upon each of the options you selected.
  - When 'True/False' is selected then two answer choices/rationales are displayed.
  - When 'Multiple Choice' is selected then six answer choices/rationales are displayed.
- Key in question text, answer text, one or more correct answers, and at your option answer rationale(s).
- When 'Multiple Choice' is selected you must enter at a minimum two and up to a maximum of six possible answer choices. You may choose to enter one or more answer rationale. Answer rationale will display on the report summary page for the learner for each incorrect response to a question.
- Click the 'Add Question' button to add the question to your list of 'Current Questions'.

To edit a question, select it from the list at the bottom of the screen.

Question

Question #:  0 Questions

Answer

Answer A

Rationale A

Answer B

Question type:  
 Multiple Choice  
 Multiple Answers  
 True/False

From 'Question Type' in the upper right, select either 'Multiple Choice' or 'True/False'. If you select Multiple Choice, and if your question is going to have more than one answer, select 'Multiple Answers'. Click the **"Select Type"** button.

If you selected True/False or Multiple Choice with Multiple Answers, your page refreshes to accommodate true and false question types or the Multiple Answers types.

If you want the multiple choice type question to have multiple answers, select the 'Multiple answer'.

From 'Question', enter the question for the test.

(Optional) If you want to include a rationale, enter the rationale as needed. If the multiple choice question has one answer, each of the six answers can have a rationale.

If this is a multiple choice question, enter the six possible **Answers** below.

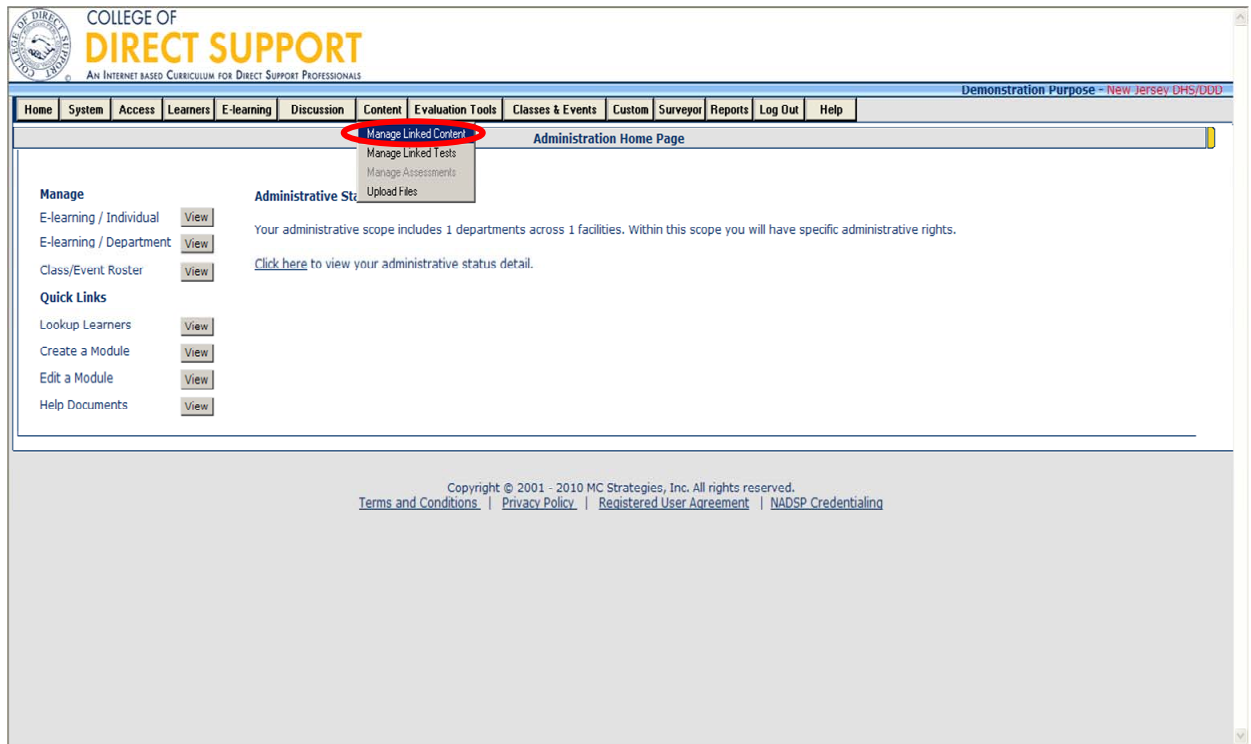
When you have finished adding answers, click the correct answer.

Click the **Add Question** button in the lower right corner of the page. The page refreshes and the second question opens. From the Question # a 2 displays, for question number two, and '1 Questions' displays beneath, telling you one question is currently complete for the test.

**Note:** Your question appears at the bottom of the page. Click the Edit button to change/update this question or the Delete button to delete the question from the test. Numbering is automatically recalculated if you delete a question.

**IMPORTANT: \*\*Any changes to the test questions or lesson content itself, will automatically be updated in the lessons/tests assigned to Learners.**

# Content – Mange Linked Content



Linking Content – You can make your own lessons and “link” these lessons using the Content Linking feature. Your lessons can be created in PowerPoint, Microsoft Word, and just about any web-authoring product you may already have.

From the menu bar **Select Content – Manage Linked Content**

# Content – Linked Content Management – Add New Lessons

Linked Content Management - Windows Internet Explorer

http://app36.webserver.com/IMS/Admin/ContentEditor/LinkedContentMod.aspx?VirtualName=H3110A/Passthrough=4j\*9M6L807/Ce8c85QgJctj3VoraA635v70q/Vbu3VYL85+Eu9LB16QC21+Is17hg0X00c4EUTV3g12Q==

Welcome, Demonstration Purpose - 01

Linked Content Management

Manage Lesson **Add New Lessons** Lesson Properties

Use this utility to link web-based content you have created and placed online. Supply the information below to register your lesson in the system. Once registered, your lesson will appear in the Course Listing under **Linked Content - CBT/WBT**

Lesson Name:  Save

Description:

Current Lesson URL:

NEW LESSON URL:  Enter URL  Link to uploaded file

Test:  Link a test to this lesson.

Options:  Allow anyone to assign this course. Leave it un-checked if only you will use it.  
 Popup Window Width:  Popup Window Height:   
 Enable web browser toolbar and controls in your lesson popup window.

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Click **“Add New Lessons”** tab

From ‘Lesson Name’ **enter a name for the lesson**

Enter a description. The learner sees the description as an introduction before going into the lesson. Optional. You may use HTML this window if you want.

Click the radio button for **“link to upload file”**. The drop-down refreshes with selections from the upload.

Click the drop-down and **select the uploaded lesson** to register your lesson in the system.

Optional. Check **Link a test to this lesson** and use the **‘Test name’ drop-down** to select the test that you want to link to this lesson.

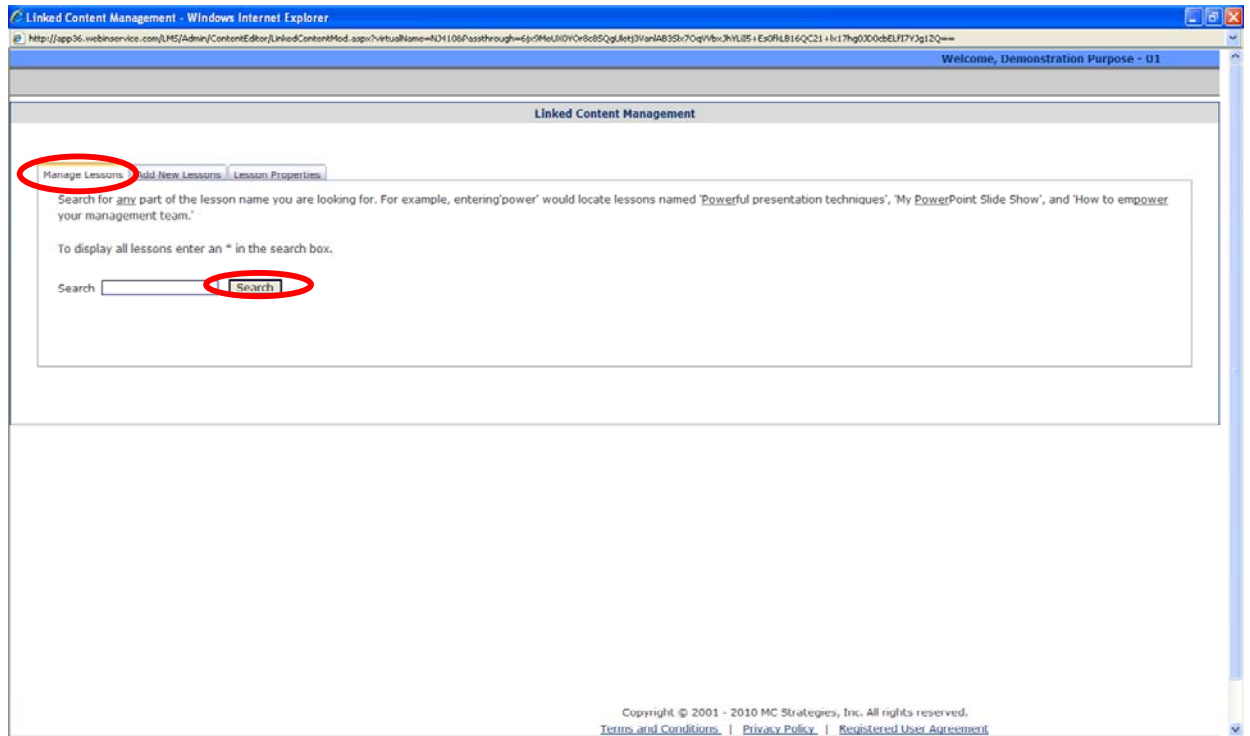
Check or leave blank the box “**Allow anyone to assign...**” depending on whether you would like for anyone to be able to assign this lesson to Learners.

Enter values for the Popup Window size. This value determines how large a window your lesson will display in. You can come back and change this later if you would like. The system will default to 640 for the width and 480 for the height if no value is entered. You can come back and change this later if you would like. Another option to insure that when a lesson opens it is full size of the learner’s window you may type the following in the intro to your lesson “TO ENLARGE THIS LESSON WINDOW, PLEASE CLICK ON F11 ON THE TOP OF YOUR KEYBOARD”.

Check or leave blank the box “**Enable web browser...**” depending on whether you want the Learner to see the web browser menu. The browser menu consists of "Back", "Forward", "Stop", "Refresh," etc. Remember most training has controls for the user already in it.

Click the “**Save**” button.

# Content – Manage Linked Content – Manage Lessons



## Removing Linked Content

You can remove linked content, however, the following applies:

**Linked Lesson:** If you attempt to remove a linked lesson that has been assigned, you will receive a message stating that the lesson is assigned and may not be removed.

**Linked Test:** If you attempt to remove a linked test that is linked to a lesson, you will get a message noting the tests is linked to a lesson and may not be removed.

## Where to Find Your Linked Lesson

In order to use your new linked lesson it must now be put into a module. Your new lesson lists under the course: **Linked Content – CBT/WBT**.

**Note:** Always test your linked lessons before assigning to other learners. Assign the lesson first to yourself and make sure all pages display properly.



# Discussion – Create a Discussion

The screenshot displays the 'COLLEGE OF DIRECT SUPPORT' web application. The header includes the college logo and the text 'AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS'. A navigation menu at the top contains: Home, System, Access, Learners, E-learning, Discussion, Content, Evaluation Tools, Classes & Events, Custom, Surveyor, Reports, Log Out, and Help. The 'Discussion' menu item is highlighted with a red circle, and a dropdown menu is visible with options: 'Create Discussion', 'View/Edit Discussions', and 'Grade Participants'. The main content area is titled 'Administration Home Page' and includes sections for 'Manage' (E-learning / Individual, E-learning / Department), 'Quick Links' (Lookup Learners, Help Documents), and 'Administrative Status Summary' (Your administrative scope includes 1 departments across 1 facilities. Within this scope you will have specific administrative rights. [Click here](#) to view your administrative status detail.). The footer contains copyright information: Copyright © 2001 - 2010 MC Strategies, Inc. All rights reserved. and links for Terms and Conditions, Privacy Policy, Registered User Agreement, and NADSP Credentialing.

Discussions can be used for both training-related and organization-related activities where you want to discuss/ exchange ideas related to training and or organizational needs in an online environment. As an administrator with Discussions permission you can act as the Moderator of the Discussion.

Discussions can be graded or ungraded.

## Ungraded Discussion Requirements

Create the Discussion and choose Not Graded.

Create the at least one topic and question.

Assign one or more Moderators to manage and respond to the postings.

Change the Assignable' radio button to 'Yes' from the Discussion Modification page General tab. when you are ready to add the Discussion to a module. (Must have at least one topic to be available for assignment.

Add the Discussion to a new or existing module. Important: Once you use a Discussion in a module, it is no longer available for use; it can be copied and renamed for use in another module.

### **Graded Discussion Requirements**

Create the Discussion and choose the Points Assigned option.

Create the Topics and questions you wish learners to discuss.

Assign one or more Moderators to manage and respond to the postings.

Change the Assignable' radio button to 'Yes' from the Discussion Modification page General tab. when you are ready to make the Discussion available to add to a module. Note a Discussion must have at least one topic to be available to assign. Add the Discussion to a new or existing module (Important: Once you use a Discussion in a module, it is no longer available for use in another module; If you wish to assign the discussion at a later date you may copy and rename the discussion.)

Assign graders the Discussion when you Edit the module.

Assign the Module with the Discussion(s) to Learners.

Moderator(s) manage postings by editing and answering postings from participating Learners as needed.

Change the Discussion Status' to 'Locked' when the Discussion is completed and you are ready for it to be graded. The Discussion is graded for each participating Learner.

Change the Discussion 'Status' to 'Closed', when grading is complete.

Note: If you are going to grade the Discussion, you should include instructions for the participating Learners about how they will be graded (e.g., number of times a Learner posts to a topic).

# Discussion Modification

Discussion Modification

Return to Discussion List

General

Title\*:  (max. 220 characters)

Assignable\*:  No  Yes  
Hint: A topic must be added before the discussion can be assigned.

Status\*:   
Hint: The discussion cannot be reopened once it has been closed. Only OPEN discussions can be edited.

Description:

Goals/Objectives:

Instructions:

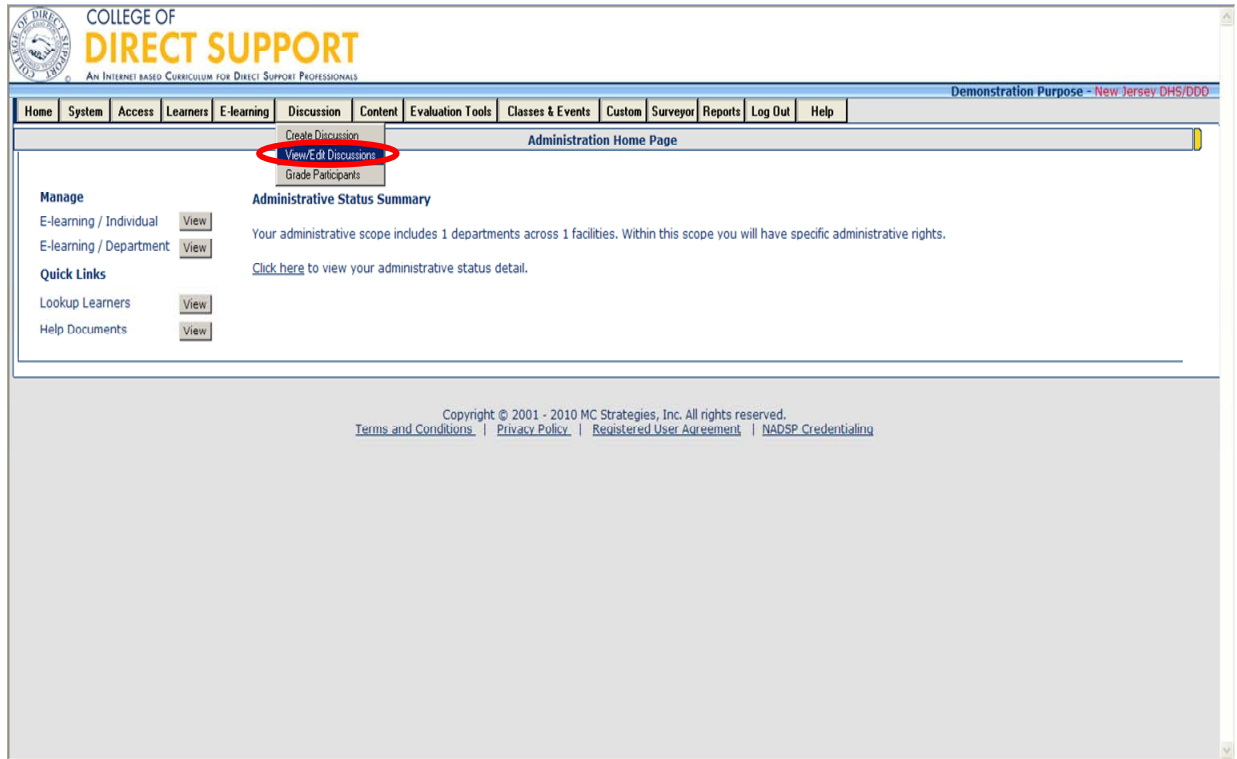
Required fields are denoted by a red asterisk \*.

Created: N/A by Purpose, Demonstration  
Last Updated: N/A by Purpose, Demonstration

Enter the title, description and goals/ objectives for the discussion. Also include any specific instructions you may have regarding the discussion then click **“Save”**.

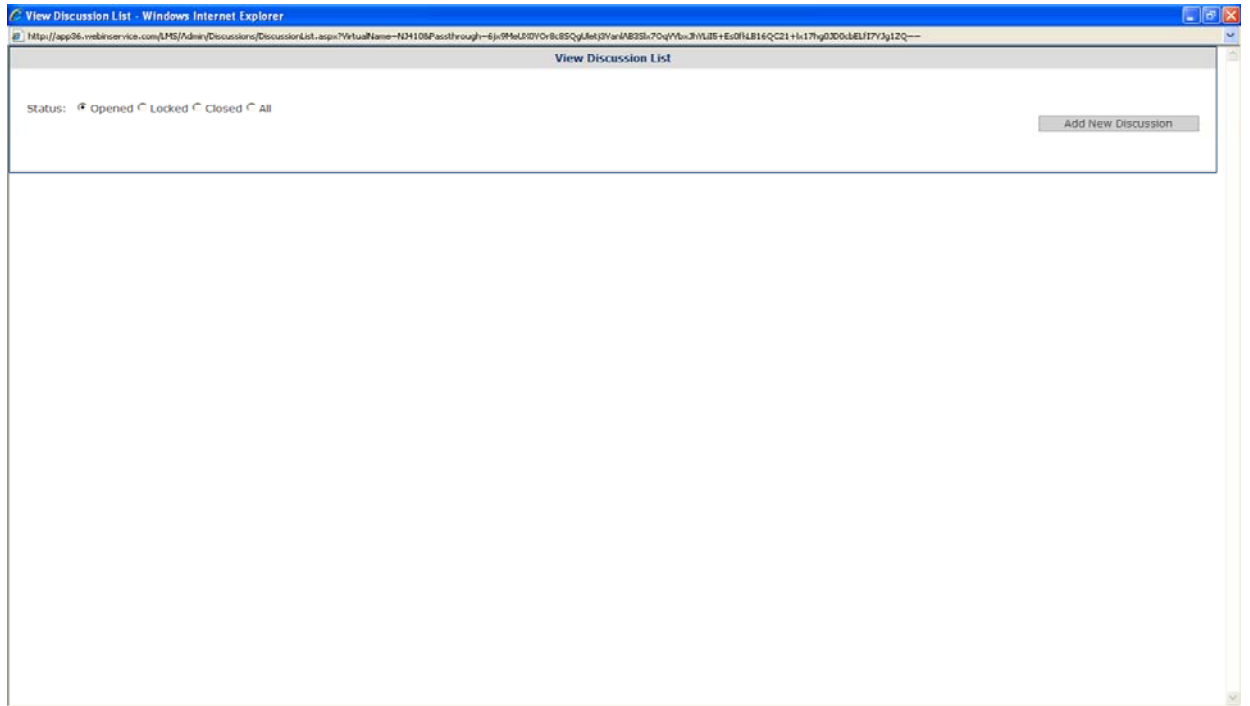
Once you have written your discussion you can assign it to individual learners or groups of learners (identified by job code).

# Discussion – View/Edit Discussion



Moderators manage Discussions including monitoring participants postings including responding to and/or editing each participant's posts.

# Discussion – View/Edit Discussions



# Annotations

# Annotations

COLLEGE OF  
**DIRECT SUPPORT**  
AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS

Home | E-learning | Classes & Events | Surveyor | Discussion | Tools | Administration | Logout | Help

Demonstration Purpose - New Jersey DHS/DDD

Personal Page for: [Demonstration Purpose](#)

**Manage**

My E-learning Lessons [View](#) 5 lessons due

My Classes & Events [View](#) 0 event scheduled in the next 15 days

My Announcements [View](#) 1 new announcements,  
0 acknowledgements due,  
0 acknowledgements overdue.

My Surveys [View](#)

My Discussions [View](#) 0 Discussions scheduled in next 30 days 0 New Postings

My Ontrack Items [View](#) 0 ontrack item due in the next 30 days

**Quick Links**

Self Enroll - Classes & Events [View](#)

Self Enroll - E-learning [View](#)

Change My Password [View](#)

References [View](#)

**Reports**

My Transcript - All Training [View](#)

Credits Earned [View](#)

Click Below To Access Additional Information about the CDS Product

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Annotations allow you to put additional content specific to your department directly into a lesson. Since lessons are copyrighted material, changing the actual lesson is not allowed. Adding an annotation does not change the lesson, but allows you to add information related to your organizational needs.

Note: Annotations display automatically at the bottom of any page where annotations have been added.

Tip: You can add images and web addresses to the annotations.

Click on the **“My Learner Home Page”** from the home tab, then click on the **“My E-Learning Lessons”**.

Click on the lesson you wish to add an annotation to. The lesson will open up in a new window. Move to the page where you want to add an annotation.

Click the “**Annotation**” button on the toolbar that runs across the top of the page. A new window will appear.



# Annotations

Add Additional Information to the Lesson - Windows Internet Explorer

http://app39.webservice.com/KDS50a/content/learning/edit/Info.asp?Lesson=bn736PCP0-01.asp&Editor=dpurpose1234&Facility=01&bl=Sertoma-PCP00

Type the annotation(s) (one at a time) you want to include for this screen. Learners will automatically see your annotation(s) below the lesson content. The link title(s) will not be displayed on the lesson screen, but will be used to manage your annotation(s). You must type a title if you plan to use both local and global annotations. Your annotation text may also contain HTML tags, so you can embed links to images or other web sites. The buttons below can assist you with HTML tagging. Simply highlight the text you wish to modify and click the desired button to bold, bullet, etc. Be sure to click the Save button to save your annotation.

Additional Information:

Link Title:

Subheading Bold Italics Heading Ordered List Bullets List Item Paragraph Image

Save Delete Close Window

Enter the **“Link’s Title”**. Enter the information you wish to add to the lesson in the box, click **“Save”**, then **“Ok”**.

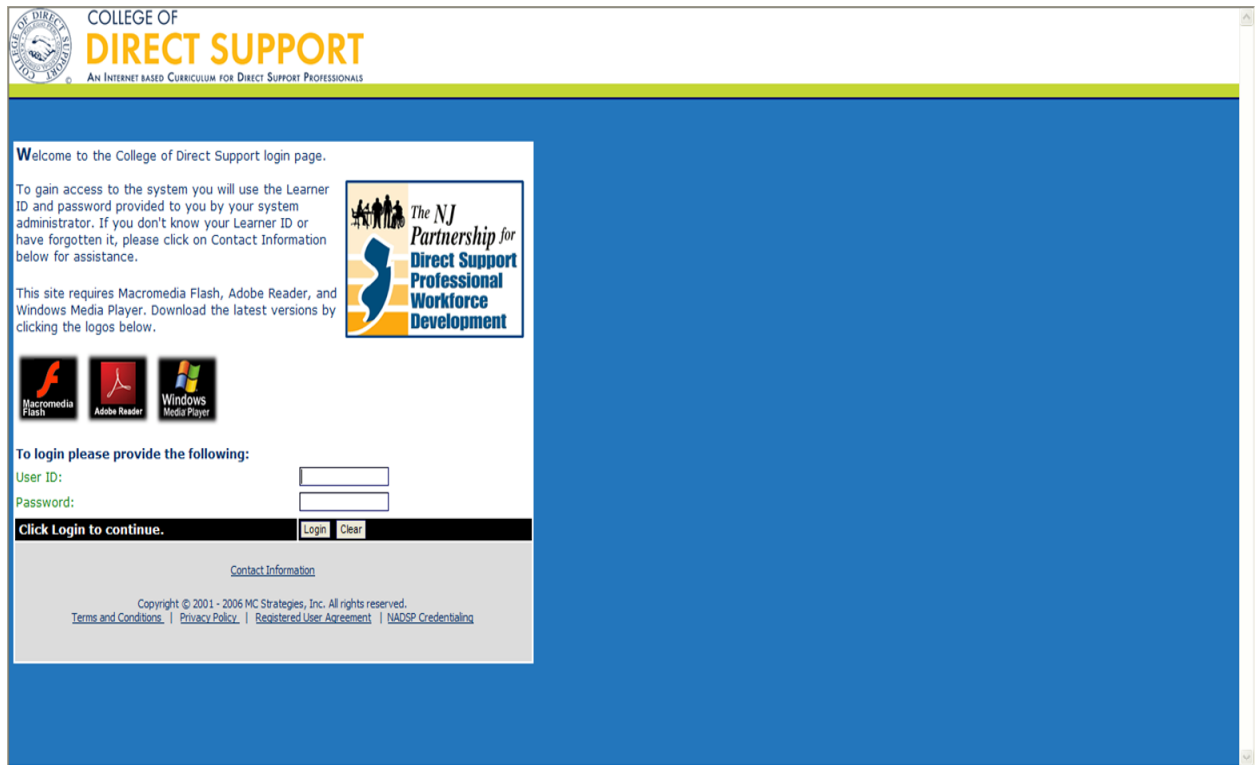
Click the **“Close”** window at the bottom of the screen. Annotations will appear automatically at the bottom of the content page for your learners.

Note: You can edit any part of an annotation by going to the page where you want to edit an annotation. Click the **“Annotation”** button on the tool bar and click the **“Edit”** button. Make the edit(s) to the annotation then click **“Save”**, **“Ok”**, then **“Close Window”**.

Note: You can also delete an annotation by opening the lesson to the page where you want to remove the annotation. Click the **“Annotation”** button, then **“Edit”**, **“Delete”**, **“Ok”**, then **“Close Window”**.

# Working with Learners

# What Learners See - 1



## **Quick Reference Guide for Learners**

### **Accessing the MC Strategies Learning Management System (LMS)**

The LMS is an Internet-based application, getting there is as simple as getting to any page on the Internet.

#### ***Getting Started***

Double click the **Internet Explorer** icon on the Windows Desktop

Type <http://www.collegeofdirectsupport.com/embcenter/> on the address line (URL) and press <ENTER>

**You can now add this page to your Favorites or create a Desktop shortcut to quickly access your Log-in page in the future.**

Enter your **Learner ID** – this should have been provided by your manager

Enter your **password**. If this is the first time you have logged in your default password is **hello**.

Click the **Log In** button

The first time you log in you will see the **Registered User Agreement**

Read the agreement and check the **agree checkbox** located at the bottom of the page

**Note:** You cannot continue until you **accept** the agreement.

Click the **Send My Response** button

Your **Personal Page** should now be open

### **Change Your Password**

Once you are logged in your Personal Page opens. If this is the first time you have logged in it is a good time to change your password.

Click the **View** button next to Change My Password at the bottom of your screen

Enter current password

Enter new password

Enter new password again in Confirm Password

Click **Submit** button

# What Learners See – 2

The screenshot displays the 'College of Direct Support' website interface. At the top, the logo and name 'COLLEGE OF DIRECT SUPPORT' are visible, along with the tagline 'AN INTERNET BASED CURRICULUM FOR DIRECT SUPPORT PROFESSIONALS'. A navigation menu includes 'Home', 'E-learning', 'Classes & Events', 'Surveyor', 'Discussion', 'Tools', 'Administration', 'Logout', and 'Help'. The user is logged in as 'Demonstration Purpose - New Jersey DHS/DDD'. The main content area is titled 'Personal Page for: Demonstration Purpose' and features several sections:

- Manage:**
  - My E-learning Lessons: View 5 lessons due
  - My Classes & Events: View 0 event scheduled in the next 15 days
  - My Announcements: View 1 new announcements, 0 acknowledgements due, 0 acknowledgements overdue.
  - My Surveys: View
  - My Discussions: View 0 Discussions scheduled in next 30 days, 0 New Postings
  - My Ontrack Items: View 0 ontrack item due in the next 30 days
- Quick Links:**
  - Self Enroll - Classes & Events: View
  - Self Enroll - E-learning: View
  - Change My Password: View
  - References: View
- Reports:**
  - My Transcript - All Training: View
  - Credits Earned: View

At the bottom, there is a copyright notice: 'Copyright © 2001 - 2010 MC Strategies, Inc. All rights reserved.' and links for 'Terms and Conditions', 'Privacy Policy', 'Registered User Agreement', and 'NADSP Credentialing'.

## Personal Page

Each time you log your Personal Page opens. There is a series of Menu Tabs across the top of the page and a set of Quick Links down the left side of the page. The quick links take you directly to the page they describe while the menu tabs offer you additional options.

## E-Learning

**My E-Learning Lessons** – takes you to your Lesson Plan and the ability to view and sort you lessons a variety of ways.

**E-Learning Not Completed** - This page lists only your incomplete lessons.

**E-Learning All My Lessons** – This page lists all of your online lessons both complete and incomplete.

**E-Learning by Program** - This page sorts all of your lessons by a Program. If your manager has asked that you complete all of your HIPAA lessons, you could use the Program sort to

ensure you have completed all lessons assigned by the HIPAA program. Not all managers assign lessons by Program so this page could be blank even though you have lessons assigned.

**E-Learning by Module** – This page sorts all of your online lessons by the module used for assignment. A module is group of lessons assigned together by the administrator based on training objectives. Your manager may ask you to complete all of the lessons in the Mandatory module. Click on the tab for E-Learning by Module to locate these lessons.

**E-Learning Self Enroll** - This page lists all on line lessons that are available for you to choose to assign to yourself. On this page you have the choice to see what lessons are available to the entire organization, only your facility, only your department, only groups that you belong to, or just for you. You may remove any incomplete lessons from your lesson plan that you added by the self enroll process.

**E-Learning Self Enrollment** – takes you directly to the **E-Learning Self Enroll** page.

**Calendar** – shows what days you have lessons due and the number of lessons due

### **Classes & Events**

**My Classes and Events** –

**Class & Events Not Completed** – a list of any Classroom Events you are scheduled to attend

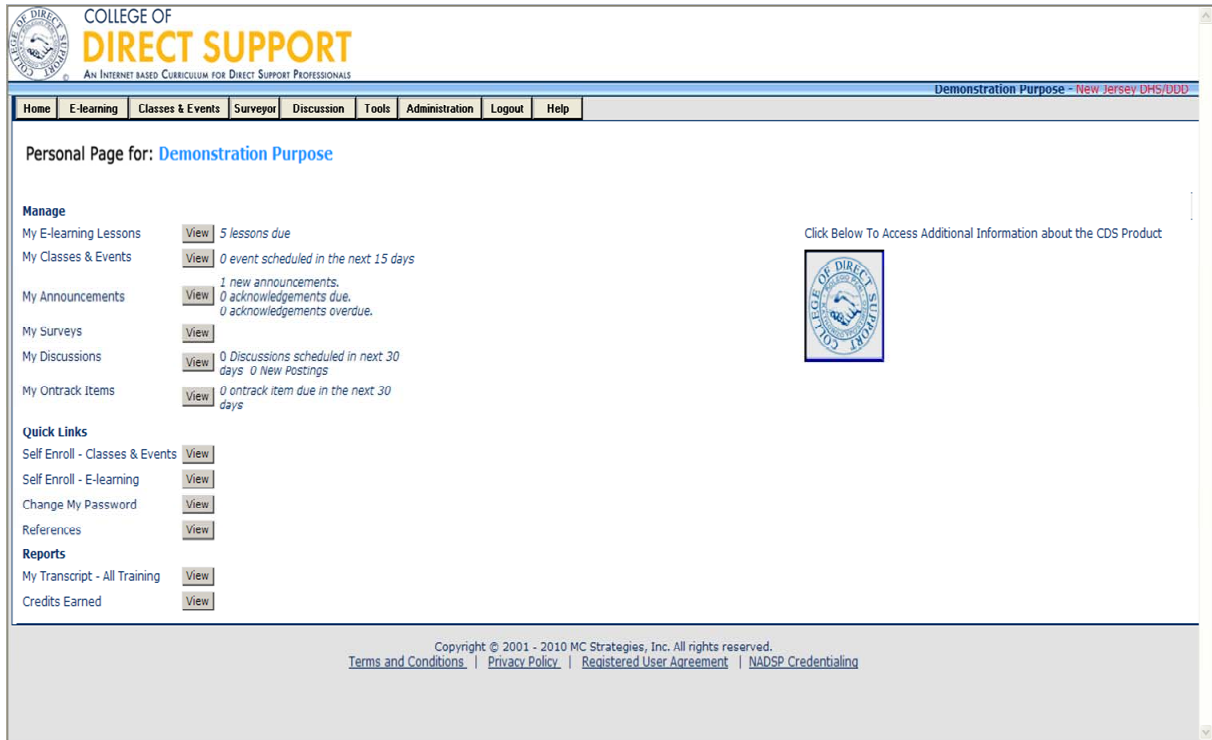
**Class & Event All My Events** – a list of all Classroom Events both scheduled and completed

**Class & Event Completed** – a list of all Classroom Events that you have already attended

**Class & Event Self Enroll** –allows you to register for classes and events that are open for registration

**Class & Event Self Enroll** – takes you directly to the **Class & Event Self Enroll** page

# What Learners See – 3



## **Calendar**

A monthly calendar identifies the days you have lessons due or events scheduled.

## **Surveyor**

Displays a list of all surveys you have completed as well as not completed.

## **Reports**

**Transcript all Training** - Transcripts include due dates, start and complete dates, scores and CEUs.

**Show all** – lists all training, e-learning, classroom and On-track events whether complete or incomplete.

**E-learning** – lists only E-learning lessons, complete and incomplete.

**Classes & Events** – lists only classroom training items, complete and incomplete

**OnTrack** – lists all items, complete & incomplete entered through OnTrack

***E-learning Credits Earned***

Lists completed e-learning lessons that are approved for credit by one or more providers also includes a link to the certificates for each lesson for learners to print.

**Tools**

**References & Links**

**My Reference List** - page lists all personal (added by learner) and global (added by administrator) references.

**Add & Edit References** - allows a learner to add a new personal reference or edit an existing personal reference by adding/editing the URL and description

**Personal Journal** – a journal for you to write in and is only visible to the learner and accessible from any lesson page except the lesson test.

**View My ID Profile** – lists the learner’s basic information as provided by the administrator or facility HR system. Also allows the learner to update or add his/her e-mail address.

**Change password** – page allows a learner to change his/her password

**Log Out** – Exit the system

**Help** – Access to a list of detailed instructions for each item on your LMS. (e.g., Step-by-step instructions for How to Create an OnTrack Item.)



# Help

**Help Documents for Administrators**

[FAQ](#) [IE 8 Compatibility](#) [April LMS Product Enhancements](#)

---

**Managing eLearning**

- Annotations
- Assign eLearning
- Change Management
- Manage Training from Lookup
- Manage Programs
- Publish - Self Enrollment
- Reassign, Archive & Remove
- System Configuration
- View Lesson Content

**Managing Learners**

- Add and Manage Learners
- Admin Access/Rights
- Announcements
- Change Learner's Facility
- Change Management
- Facility, Department & Group
- Global References
- Manager Zone
- Quick Reference for Learners
- Rules Manager

**Add'l Educational Solutions**

- Assessments/Remedial Lessons
- CDS Assessment Manager
- Classes & Events
- Content Linking
- Content Uploading
- Discussions
- Integrated Nursing Skills
- Knowledge Manager
- Mosby's Imaging Suite
- Ontrack
- Personal Learning
- Preceptor Menu
- Surveyor (Surveys)

**Grading**

- Discussions
- Knowledge Manager Checklist
- Nursing Skills Checklist

**Testing/Exams**

- Adm Proctors/Learners CRCR Exam

**Reports**

- Reports Menu
- Seat Counting Report

**Videos**

- April 2010 Product Enhancements
- Announcements/Acknowledgements

**Automated Process**

- Events Badge Scanning
- HR Download

**Miscellaneous**

- Current Forms Menu
- Joint Commission Customization
- Licensed AACN Content Info
- MENCE Course Lesson Mapping
- Periop 101: Core Curriculum Menu **NEW**
- System Requirements (minimum)
- Outlook Calendar with Events

## Additional Training

- Overview of the Career Path will be offered each quarter
- Becoming an Effective Mentor and Mentor Train-the-Trainer will be offered throughout the year.
- Additional Trainings Available: NADSP Certification, CDS info Sessions as requested.
- Boggs Center will provide TA at no charge - Agencies will have the option to pay \$2800 for a facility and direct TA from MC Strategies

## Additional Information

- For an electronic copy of the manual and more information about the New Jersey Partnership for Direct Support Professional Workforce Development visit:  
[www.state.nj.us/humanservices/ddd/programs/cds.html](http://www.state.nj.us/humanservices/ddd/programs/cds.html)
- For Technical Assistance on using the College of Direct Support email:  
[cdsta@umdnj.edu](mailto:cdsta@umdnj.edu)

# The College of Direct Support Administrator Training Manual

## Index

### Topic.....Page number

New Jersey Partnership for Direct Support Professional Workforce Development (NJPDSPWD) general information.....	2 – 4
System capabilities, requirements.....	5 – 8
Login information.....	9
Personal page.....	10
Administration page.....	11 – 12

### **Learners**

Adding New Learners.....	13 – 19
Looking Up and Editing Learner Information.....	20 – 32
Changing Learner Status (Active/ Inactive).....	33 – 36

### **Classroom Training**

Pre-Service information page.....	37
Adding/Editing Instructors.....	38 – 42
Adding/ Editing Classroom Location.....	43 – 46
Creating a Template for New <u>Agency Specific</u> Classroom Training.....	47 – 54
Scheduling a Classroom Training (including Pre-Service Trainings).....	55 – 70
Enrolling Learners in a Classroom Training.....	71 – 82
After the Classroom Training (editing Learner status).....	83 – 87
Archiving Events.....	88 – 91
Running Reports on Classroom Trainings.....	92 – 101

### **Ontrack (historical data and certifications)**

Historical data and certifications information page.....	102 – 103
Enroll and Schedule One Learner At-a-Time.....	104 – 111
Enroll and Schedule an Item for Multiple Learners.....	112 – 118
Removing Items from Learners.....	119
Removing a Single Learner from an Item.....	120 – 122
Removing Multiple Learners from an Item.....	123 – 124
Running Reports on Ontrack Items.....	125 – 133

Index continued....

**Assigning E-Learning (online training)**

E-Learning information.....134 – 141

*Assign E-Learning*

- Individual.....142 – 152
- Department.....153 – 159
- Selected Learners.....160 – 167
- Self Enrollment.....168 – 170

**Additional Helpful Tools**

Announcements.....172 – 180

Running Reports.....181 – 202

Adding Agency Specific Online Training to the CDS.....203 – 216

Discussions.....217 – 221

Annotations.....222 – 225

Working with Learners.....226 – 232

Help Link.....233

Additional Training/ Information.....234, 235