TRAIN Florida
Roles and Permissions

June 2017

Successfully Managing TRAIN Florida

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To protect, promote & improve the health of all people in Florida through integrated state, county, & community efforts.

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The TRAIN Florida Learning Management System (LMS) provides automated content and administrative functions, as well as a full range of end user features encompassed by a learner centered, user friendly, intuitive learning event. It has a multi-tier architecture, an infrastructure that is flexible, and provides customizations that synchronize at each level of the database.

It is also important to know and understand where the user is looking for information in the LMS, how the LMS is used for professional and career development, and how well the LMS serves all users' needs.

Defining the TRAIN Florida's Administrator and Course Provider roles and permissions helps the Department (DOH) and our Public Health System Partners (PHSP) to:

- Improve workforce productivity
- Provide an intuitive and integrated learning experience with content, activities, and resources
- Manage competency, compliance, and audit readiness by tracking, executing, and reporting on required learning activities and certifications and,
- Engage the workforce and improve readiness by providing integrated learning and development plans that support employee growth

What Are the Roles and Permissions in TRAIN Florida?

TRAIN Florida has three basic roles:

1. **Site Administrator** – The DOH LMS Support team – dohlmssupport@flhealth.gov
2. **Lead/Local Administrator** – Division/CMS/CHD/PHSP staff
3. **Course Providers** – Staff assigned to create and manage course content

Specific permissions to different TRAIN Florida functions can be assigned within each role.

Section 1 – Site Administrator Role

The TRAIN Florida Site Administrators consist of an Oversight Administrator, a Lead Administrator, and Support Team members. **Site Administrator responsibilities include, but are not limited to, the following tasks related to site management, communications, and coordination:**

Site Management:

1. Process request(s) from new Course Providers specific to TRAIN Florida's jurisdiction, in accordance with TRAIN policies, and gather additional information as required to register or reject the request(s) (Daily, or as needed)

2. Process new listings of public health courses submitted by public and private Course Providers to the TRAIN Florida site, and approve, reject, or modify courses as indicated (Daily, or as needed)

3. Facilitate the entry of courses offered by DOH and by any third-party providers for whom DOH has made special arrangements to enter data about their courses

4. Establish and maintain Course Provider records as needed, to track special conditions of approvals, reasons for rejection, or responses to marketing efforts

5. Provide Tier 2 Support by responding promptly to all user and provider inquiries (Daily, or as needed)

6. Define and manage the primary and back-up roles of all staff and Public Health System Partners in the management of the TRAIN Florida site. Coordinate DOH's use of available telephone, email, technical, and administrative support

7. Assign and manage access rights of individuals and groups for the TRAIN Florida site. Ensure all persons that administer the site reference materials, understand TRAIN policies, and receive guidance or peer review as needed to correctly enter, approve, and edit courses

8. Implement TRAIN policies, and enforce policies with all TRAIN Florida site users

9. Post and update announcements, documents, discussion boards, or other information posted in the knowledge management areas of the TRAIN Florida site

10. Perform monthly quality assurance reviews of listings, and provide guidance, reminders, and training within the TRAIN Florida jurisdiction to improve the quality and timeliness of data on the TRAIN Florida site. Participate in periodic quality assurance processes with the Public Health Foundation (PHF) to ensure TRAIN Florida course, and Course Provider, management practices are consistent internally, and with nationwide policies

11. Administer the DOH Reporting Portal to help generate TRAIN Florida reports using course, Course Provider, and learner data for assessment or evaluation purposes

12. Facilitate the TRAIN Florida process for learner registration batch upload

Communications and Marketing:

1. Maintain communications about TRAIN Florida with sponsors, administrators, Course Providers, and learners

2. Conduct outreach to invite providers of training, specific to the TRAIN Florida's jurisdiction, to enter their courses on the TRAIN Florida site in accordance with TRAIN policies. Refer providers of nationally or regionally available courses to the TRAIN National site for registration

3. Market TRAIN Florida to potential users in the public health, and health-related fields, through TRAIN Florida marketing materials, presentations, e-mail messages, and other promotional strategies

Coordination and Partnerships:

1. Work with internal and external users, to maximize the use and benefit of the TRAIN Florida site

2. Help establish, or incorporate, TRAIN Florida into workforce policies, Memoranda of Agreements, strategic plans, performance reports, and other DOH systems

3. Participate in meetings of the TRAIN Affiliate Consortium (TAC), and provide input regarding the development of future site enhancements, such as changes to the network's features, common course submission fields, site policies, and quality assurance processes

Site Administrator Available Permissions

The TRAIN Florida Site Administrator has the following permissions:

- Accreditation Manager
- Announcement Manager
- Assessment Manager
- Batch Registration Manager
- Conference Presenter
- Conference Presenter Approver
- Course Approval Manager
- Course Attendance Manager
- Course Certificate Manager
- Course Provider Approver
- Course Registration Approval Manager
- Course Reviews Manager
- Course Session Manager
- Discussion Manager
- Email Manager
- Evaluation Manager
- LCMS Administrator
- Link Manager
- Live Event Manager
- Location Manager
- Non-Train Event Manager
- Non-Train Event Poster
- Permission Manager
- Portfolio Manager
- Report Manager
- Resources Manager
- Training Plan Manager
- Survey Manager
- Survey Reviewer
- User Account Manager

See the **Definitions of Administrative Roles** for the full description of permissions.

Section 2 – Lead / Local Administrator Role

The assigned TRAIN Florida Administrator may consist of a Lead Administrator and if applicable, Local Support Team administrators to manage the TRAIN Florida application. The Administrator will coordinate the learner registrations for staff with the DOH LMS Support team. **The Administrator's responsibilities include, but are not limited, to the following tasks related to site management, communications, and coordination:**

Site Management:

1. Coordinate with the DOH LMS Support team to help process applications from new Course Providers, specific to TRAIN Florida's jurisdiction in accordance with TRAIN policies, and gather additional information as required to register or reject applicants (Daily, or as needed)

2. Process new listings of public health courses to the TRAIN Florida site, and approve, reject, or modify courses as indicated (Daily, or as needed)

3. Facilitate the entry of courses offered by the organization

4. Establish and maintain TRAIN Florida's Course Provider records as needed, to track special conditions of approval, reasons for rejection, or responses to marketing efforts

5. Respond promptly to all Tier 1 user and provider inquiries (Daily, or as needed)

6. Define and manage the primary and back-up roles of all staff in the management of the TRAIN Florida site. Provide Tier 1 support for telephone, e-mail, technical, and administrative support, or elevate issues to Tier 2 support if necessary

7. Assign and manage access rights of individuals and groups for assigned locations. Ensure all persons that administer the site reference materials, understand TRAIN policies, and receive guidance or peer review as needed to correctly enter, approve, and edit courses

8. Enforce TRAIN policies with all TRAIN Florida site users

9. Post and update announcements, documents, discussion boards, or other information posted in the knowledge management areas of the TRAIN Florida site

10. Perform periodic quality assurance reviews of listings, and provide guidance, reminders, and training within assigned location, to improve the quality and timeliness of data on the TRAIN Florida site

11. Participate in periodic quality assurance processes with the DOH LMS Support team, to ensure course and Course Provider practices are consistent internally, and with nationwide policies

12. Use the TRAIN Florida Report Console to help generate TRAIN Florida reports using course, Course Provider, and learner data for assessment or evaluation purposes

13. Coordinate the TRAIN Florida process for learner registration batch upload for their assigned location

Communications and Marketing:

1. Maintain communications about TRAIN Florida with Course Providers and learners. Coordinate with the DOH LMS Support team as needed

Coordinate with the DOH LMS Support team to help conduct outreach, to invite providers of training specific to the TRAIN Florida's jurisdiction, to enter their courses on the TRAIN Florida site in accordance with TRAIN policies. Refer providers of nationally or regionally available courses to the TRAIN National site for registration

2. Coordinate with the DOH LMS Support team to help market TRAIN to potential users in the public health, and health-related, fields through TRAIN Florida marketing materials, presentations, e-mail messages, and other promotional strategies

Coordination and Partnerships:

1. Coordinate with the DOH LMS Support team to help work with internal and external partners to maximize the use and benefit of the TRAIN Florida site

2. Participate in the DOH LMS Support conference calls and meetings and provide input regarding the development of future site enhancements, such as changes to the network's features, common course submission fields, site policies, and quality assurance processes

Local / Lead Administrator Available Permissions

The TRAIN Florida Lead/Local Administrator has the following permissions:

- Accreditation Manager
- Announcement Manager
- Assessment Manager
- Conference Presenter
- Conference Presenter Approver
- Course Approval Manager
- Course Attendance Manager
- Course Certificate Manager
- Course Registration Approval Manager
- Course Reviews Manager
- Course Session Manager
- Email Manager
- Evaluation Manager
- Library Administrator
- Link Manager
- Live Event Manager
- Location Manager
- Non-Train Event Manager
- Non-Train Event Poster
- Permission Manager
- Report Manager
- Training Plan Manager
- Survey Manager
- Survey Reviewer
- User Account Manager

See the **Definitions of Administrative Roles** for the full description of permissions.

Section 3 – Course Provider Role

The Course Provider Role is requested by users. Once assigned the role by the DOH LMS Administrators, TRAIN Florida Course Providers create and manage courses in their designated locations.

Prior to being granted access to TRAIN Florida course tools, all assigned DOH Course Providers should complete the DOH Analyze, Design, Develop, Implement, Evaluate, Revise (ADDIER) training, available in TRAIN Florida.

Course Providers are required to adhere to the **FDOH Training Content Standards**. These standards are designed to ensure trainings produced through the Department of Health are of high quality and fit the strategic objectives of the system. The standards provide an explanation of each component, and work in conjunction with the **Review Rubric** Excel sheet.

The following are the minimum course listing requirements for TRAIN Florida:

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

The TRAIN Florida Site Administrators and Lead/Local Administrators are responsible for assuring that courses meet these minimum requirements. PHF (the vendor) will periodically review courses to ensure all affiliates approve courses consistent with these minimum requirements. The TRAIN Florida Site Administrators may apply additional, state-specific standards to decide whether a course maybe approved, or viewed on the TRAIN Florida site.

The TRAIN Florida Site and Lead/Local Administrators can amend the Course Provider responsibilities. The Course Provider responsibilities include, but are not limited to, the following tasks related to the TRAIN Florida site management, communications, and coordination:

Site Management:

1. Course Providers are required to adhere to the **FDOH Training Content Standards**, designed to ensure trainings produced through the Department of Health are of high quality and fit the strategic objectives of the system
2. Manage online registration and learner rosters
3. Collect feedback from learners online
4. Post course materials and discussion topics

Communications and Marketing:

1. Maintain communications about TRAIN Florida with the Lead/Local Administrators and learners.
2. Coordinate with the Lead/Local Administrators as needed

3. Coordinate with the Lead/Local Administrator(s) to help conduct outreach to invite providers of training, specific to the TRAIN Florida's jurisdiction, to enter their courses on the TRAIN Florida site in accordance with TRAIN policies. Refer providers of nationally or regionally available courses to the TRAIN National site for registration

4. Coordinate with the Lead/Local Administrator to help market TRAIN to potential users in the public health and health-related fields through TRAIN Florida marketing materials, presentations, e-mail messages, and other promotional strategies

Coordination and Partnerships:

1. Participate in the DOH LMS Support conference calls and meetings

2. Provide input regarding the development of future site enhancements, such as changes to the network's features, common course submission fields, site policies, and quality assurance processes

Additional Course Providers Responsibilities

1. Course Providers are responsible for entering their course information into TRAIN Florida, and keeping this information up to date

2. As a Course Provider, you agree to allow the Public Health Foundation (PHF) and TRAIN Affiliates use of your course titles, and organizational name, for publicity of the TRAIN National or TRAIN Affiliate sites

3. All DOH statewide courses will be placed in a temporary holding bin until approved for listing by the TRAIN Florida Site administrator(s). All PHSP courses entered by the PHSP Course Providers will be placed in a temporary holding bin until approved for listing by the PHSP Administrator(s). Course Providers will be notified by e-mail upon approval or denial of a course

4. Courses will automatically become de-activated once the entered de-activation date arrives. The Course Provider may modify the date prior to de-activation.

5. The TRAIN Florida Site Administrators reserve the right to edit course listings, subject areas, target audiences, or other attributes for clarity and overall consistency with TRAIN National submission requirements. TRAIN Affiliates also reserve the right to block any course from view on their individual site, even if the course was approved by another TRAIN Affiliate

6. PHF reserves the right to refuse or revoke any organization's privilege to submit courses to TRAIN, that are inconsistent with the purpose, scope, and target audiences of TRAIN, or for any reason

7. Course Providers should list their courses on TRAIN through **TRAIN Florida site only**

The TRAIN Florida - Course Providers Available Permissions

The TRAIN Florida PHSP Course Providers have the following permissions:

- Accreditation Manager
- Assessment Manager
- Conference Presenter
- Conference Presenter Approver
- Course Attendance Manager
- Course Certificate Manager
- Course Registration Approval Manager
- Course Reviews Manager
- Course Session Manager
- Email Manager
- Evaluation Manager
- Library Administrator
- Link Manager
- Live Event Manager
- Non-Train Event Manager
- Non-Train Event Poster
- Report Manager
- Training Plan Manager
- Survey Manager
- Survey Reviewer

See the **Definitions of Administrative Roles** for the full description of permissions.

Section 4 – Definitions of Administrative Roles

The TRAIN Florida administrative roles may be assigned to individuals, or groups, to share site management responsibilities, or increase access to TRAIN data. Applying administrative roles to users who are not assigned as Administrators or Course Providers **is not authorized**.

* Users with this role, when assigned to the state level, will appear on the **Help – Contacts** page. Site Administrators can assign and remove these roles, as well as other roles.

Role Name	Description
Accreditation Manager	Can access, edit, and add new and existing accreditations under the Admin - Courses - Accreditations menu.
Announcement Manager	Creates, modifies Announcements; assigns them to groups. Allows users to add announcements either on the Home page or from the Admin - Announcements menu.
Assessment Manager	Allows users to add and edit assessment question categories, add and edit questions in those categories, and assign assessments and assessment questions to courses. Users can add assessments to courses in the Course Search or Admin - Courses - Course List menu. To add assessment question categories and questions, users will have access to the Admin - Courses - Assessments menu.
Batch Registration Manager	Allows administrators to upload multiple users to a course, even if that course is expired. This is done from the course details page. It also allows admins to upload users in the Admin - Users - Upload Users interface.

Role Name	Description
Conference Presenter	Allows users to be listed within a conference session as the presenter for that session. Users will appear in a dropdown menu within the conference session interface. Users will also be able to manage their Conference Presenter profile, bio, and presenter materials. This role must be applied for by the user under My Account.
Conference Presenter Approver	Approves users who request the Conference Presenter role. This is available in the Admin - Approvals interface.
Course Approval Manager*	Adds, modifies courses. Approves or declines new courses. This is available in the Admin - Approvals interface or the Admin - Course List interface by opening the course wizard.
Course Attendance Manager*	Verifies Course Attendance. Sets the Completed Verified status for users registered for the course. Can access the Admin - Users - Verifications interface.
Course Certificate Manager	Creates, modifies Certificates and assigns them to groups for use in courses. This function is available in the Admin - Courses - Certificates interface.
Course Provider Approver	Approves or declines user requests to become a Course Provider, using the Admin - Approvals interface.
Course Registration Approval Manager*	Approves or declines course registrations for courses requiring approval, using the Admin - Approvals interface.
Course Reviews Manager	Activates/deactivates course reviews in the course details page.
Course Session Manager	Adds, modifies course sessions. Allows admins to add sessions to courses that they did not create. If the course is available for the same group to which this role is assigned, admins will be able to open the sessions interface for the course and add/edit available sessions.
Discussion Manager	Creates, modifies Discussion Topics; assigns them to groups. To create a discussion topic, admins have available the Admin - Discussions interface and, also the Discussion Boards tab.
Email Manager	Can access the email utility and send emails to users in the assigned group. This is available in the Admin - Utilities - Email Utility interface. Able to email any users also assigned to the group to which the role is assigned.
Evaluation Manager	Allows users to add and edit evaluations question categories, add and edit questions in those categories, and assign evaluations and evaluation questions to courses. Users can add evaluations to courses in the Course Search or Admin - Courses - Course List menu. To add evaluations question categories and questions, users will have access to the Admin - Courses - Evaluations menu.

Role Name	Description
LCMS Administrator	Modifies LCMS item descriptions, assigns LCMS items to groups, and approves LCMS items submitted by users. Management for the LCMS is available in the Admin - LCMS interface as well as under the LCMS tab.
Link Manager	Users can access to add and edit items listed under the Admin - Spotlight interface. Links posted here appear on the TRAIN home page for the appropriate groups.
Live Event Manager	Receives monthly notifications of new events via email.
Location Manager	Allows access to the Admin - Courses - Session Locations interface. Users will be able to add session locations that can later be selected when creating session schedules. Location manager cannot necessarily create session schedules.
Non-Train Event Manager	Approves, manages Non-Train events in the Admin - Approvals and Admin - Non-Train Events interfaces.
Non-Train Event Poster	Adds, modifies Non-Train events in the Admin – Non-TRAIN Events interface
Permission Manager*	Allows administrators to access the user list and assign administrative role to users. This is available in the Admin - Users - User List interface.
Portfolio Manager*	Allows administrators to set course visibility independent of what the Course Provider might have set. This is accessible in the Admin - Courses - Course Availability interface.
Report Manager	Accesses reports of aggregate data about site usage, and Excel exports of raw site usage data. Can also access the Ad-Hoc report interface. Both options are available under the Admin - Reports menu.
Resources Manager	Modifies document descriptions; assigns documents to groups; approves documents submitted by users. This role allows access to the Admin - Resources interface and some admin functions under the Resources tab.
Survey Manager	Survey Managers can create new and manage existing surveys under the Admin - Surveys interface.
Survey Reviewer	Allows user to perform reviews of surveys after a user has submitted a public review survey for review.
Training Plan Manager	Allows users to create and assign Training Plans to users. This is managed in the Admin – Courses - Training Plan interface
User Account Manager*	Creates, modifies User Accounts; assigns users to groups via the Admin - Users - User List interface.

* Users with this role, when assigned to the state level, will appear on the **Help – Contacts** page. Site Administrators can assign and remove these roles, as well as other roles.