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# TRAIN User Handbook

Version 3.17 (1/10/14)

Public Health Foundation



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## About This Handbook

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This handbook is intended for all general users of TRAIN. This document covers all basic information needed to effectively use TRAIN and manage your online learning. If you have any questions regarding the contents of this document or if this document does not answer your questions, please contact your TRAIN administrator or Public Health Foundation (PHF).

New Items for this release include:

- Page 20: Conference Registration

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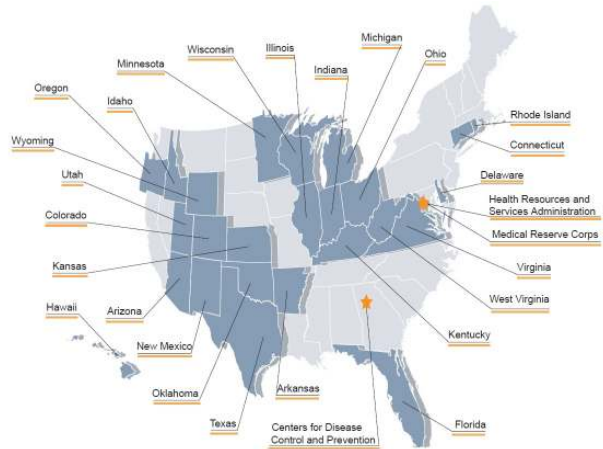
## TRAIN Basics

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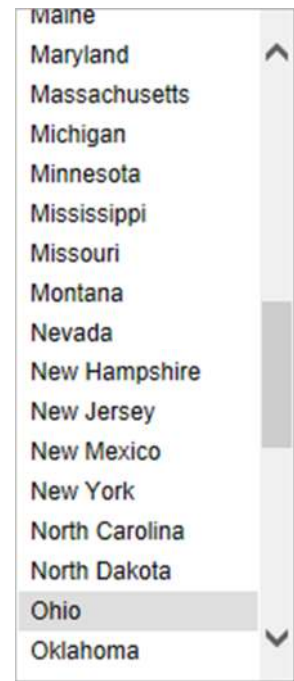
Getting started in TRAIN is easy; all you need is an account at [www.TRAIN.org](http://www.TRAIN.org). Each participant state has its own *portal*. Portals are different ways of accessing the same information. If you don't see your state listed below, you can always use [www.TRAIN.org](http://www.TRAIN.org).

### State Affiliates and Organizations

- Arizona <http://az.TRAIN.org>
- Arkansas <http://AR.TRAIN.org>
- CDC <http://cdc.train.org>
- Colorado <http://www.CO.TRAIN.org>
- Connecticut <http://CT.TRAIN.org>
- Delaware <http://DE.TRAIN.org>
- Florida <http://fl.TRAIN.org>
- Hawaii <http://www.HAWAII.TRAIN.org>
- HRSA <https://hrsa.TRAIN.org>
- Idaho <http://id.TRAIN.org>
- Illinois <http://i.TRAIN.org>
- Indiana <http://in.train.org>
- Kansas <http://KS.TRAIN.org>
- Kentucky <http://KY.TRAIN.org>
- Michigan <http://MI.TRAIN.org>
- Minnesota <http://mn.TRAIN.org>
- MRC <http://www.MRC.TRAIN.org>
- New Mexico <https://nm.TRAIN.org>
- Ohio <http://OH.TRAIN.org>
- Oregon <http://OR.TRAIN.org>
- Oklahoma <http://OK.TRAIN.org>
- Rhode Island <http://RI.TRAIN.org>
- Texas <http://TX.TRAIN.org>
- Utah <http://www.UT.TRAIN.org>
- Virginia <http://VA.TRAIN.org>
- Wisconsin <http://WI.TRAIN.org>
- West Virginia <http://WV.TRAIN.org>
- Wyoming <http://WY.TRAIN.org>



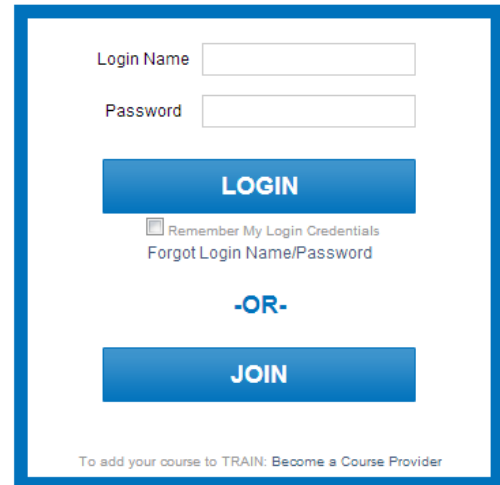
Select your state →



## Creating a TRAIN Account

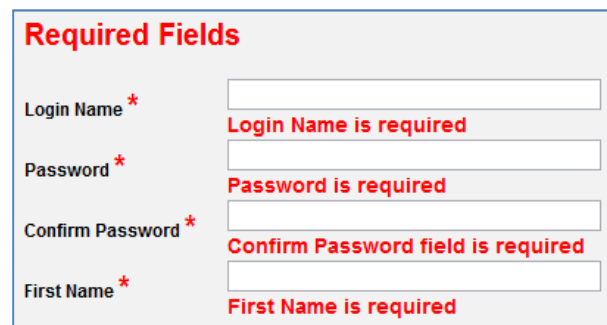
Anyone can create a TRAIN user account. It's a free process and is open to all. To create account, you'll need a few pieces of information, such as your email address and work setting. Once your account is setup, you'll have full access to your state's list of training courses

**Important:** Most of the content listed on TRAIN is generated by third parties. This means that the content may have been created across multiple platforms and the technical requirements for accessing each course may vary depending on the individual Course Provider's preferences and settings. Please see the **Error! Reference source not found.** section below.



### TO CREATE A TRAIN ACCOUNT:

1. Locate and access your state or organization's portal address from the State Affiliates and Organizations list above. Or, if you don't see an appropriate portal listed above, use [www.TRAIN.org](http://www.TRAIN.org).
2. Within the portal page, click the **JOIN** button. This will be on the left side of the page
3. Read and agree to the [TRAIN Policies](#).
4. The next page in the account creation process will guide you through providing the required information for your TRAIN account. Any field noted with a red asterisk (\*) is required – this will remain true through the site. Your TRAIN account will not be created until all required fields are provided.



**Important:** If you would like to receive emails from TRAIN, please consider the email receipt options carefully. There are two options for receiving email:

- a. *I would like to receive emails from TRAIN*
- b. *I would like to receive notifications about the updates by email*

For more information on the TRAIN email options and processes, please see the Email Receipt Options section below.

5. Once your required fields are complete, the next page displays a dynamic series of dropdown menus, available by clicking on the "Select Groups" button. This is how your *group assignment* is determined. Everything in TRAIN has a group assignment. Items assigned to one group, cannot access items assigned to another group. Groups can be divided in a variety of ways in TRAIN; some examples include geographically (states, counties, cities), organizationally (health

department, department of corrections, police department), professionally (physicians, nurses, general public health staff), among others. Groups help ensure that the appropriate content is delivered to the appropriate users. In selecting your groups, please be as accurate as possible (you can always change your group assignment after your account is created). If you have questions about which groups to place yourself in, please contact your TRAIN affiliate administrator.

- a. Within the group assignment process, you are allowed to select groups for several different TRAIN portals: your state portal; Medical Reserve Corps (MRC); and the Centers for Disease Control and Prevention (CDC); and the Health Resources and Services Administration (HRSA).
- b. It is strongly suggested that you add yourself to the corresponding state portal groups. To do so, click the 'Select Groups' button next to that portal on the group selection page.
- c. You can also select group for HRSA, CDC, and MRC participation. To do so, simply click the 'Select Groups' button next to each portal. A popup window will appear to walk you through selecting the correct groups.

**Note:** Selecting "Remove Groups" will remove all groups below that portal only.

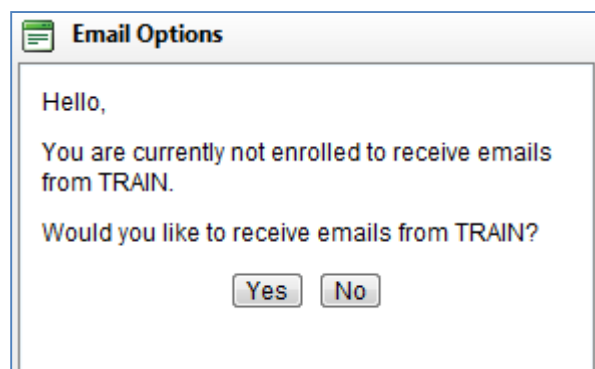
6. Next, you will describe your professional role. Use the checkboxes next to each listing and follow the onscreen instructions.
7. You're almost done! The last required step, is to provide your work settings. Use the checkboxes next to each listing and follow the onscreen instructions.
8. The last step is demographic information and is entirely optional; but we encourage you to provide your feedback as it will help us improve the TRAIN experience. Thanks!

**Important:** When creating a new TRAIN account, please do not use your browser's 'Back' button. If you need to navigate the account creation wizard, please use the 'Back' and 'Next' buttons   provided within the interface.

### Email Receipt Options

As a TRAIN user, you have the option to receive emails from TRAIN or not. TRAIN automatically sends important email reminders, updates and notifications. You can opt-out of these notifications; but in doing so, may miss vital information.

If you do not want to receive emails from TRAIN, simply follow the onscreen instructions and select **No** when prompted about continuing to receive TRAIN emails



If you do want to continue to receive TRAIN emails, select **Yes** when prompted. Next, confirm that the email we have on file for you is valid. Lastly, open you email inbox, location the confirmation message

from TRAIN and click on the confirmation link in that email. This will confirm your email address and you will continue to receive emails from TRAIN.

If you need to change your email receipt settings later, please follow the steps outlined in the [Opting Out of TRAIN Emails](#) and [Opting In to Receive TRAIN Emails](#) sections below.

### Opting Out of TRAIN Emails

1. If you are a new user setting up your account for the first time and you do not wish to receive any emails from TRAIN, leave the, *I would like to receive emails from TRAIN*, option unchecked. This option will appear after you agree to the TRAIN Policies.
2. If you are an existing user and you do not want to receive emails from TRAIN, login to your TRAIN account. On the home page, click the **My Account** link and uncheck the, *I would like to receive emails from TRAIN*, option. Be sure to save your settings changes!

### Opting In to Receive TRAIN Emails

If you want to receive emails from TRAIN, you will first need to follow a few simple steps to confirm your email address.

#### TO RECEIVE TRAIN EMAILS:

1. Log in to your TRAIN account
2. On the Home page, click the **My Account** link
3. In the My Account interface, below the personal data fields, select the option, *I would like to receive emails from TRAIN*.
4. Click **OK** to send the confirmation email
5. Open your email account and locate the confirmation email from TRAIN. It may take a few minutes for the confirmation email to be sent. The confirmation email might also be filtered as spam, so be sure to check your junk folder.
6. Lastly, click on the link in the confirmation email and you're done. You can now receive emails from TRAIN.
7. TRAIN will periodically (approximately every 12 months) ask you to reconfirm your email address. This is for your protection and to help prevent the delivery of TRAIN emails to those users who wish not to receive them.

### Navigating TRAIN

The TRAIN navigation tools are designed with the end user in mind. They are intended to be simple and universal. This means that navigation lists or tabs on one page, will function almost identically on all other pages. We hope you will feel free to explore the TRAIN site; finding your way back is easy, so don't be afraid to lose yourself in TRAIN!



## Tab Navigation

The tabs across the top of the TRAIN site are the main navigation for TRAIN. These tabs divide TRAIN content into logical parts. The most common access points are **Course Search Box** and **Resources**. These tabs contain the most content and are good places for new users to start looking for learning material.

## List Navigation

On various pages throughout TRAIN, you will encounter some additional list menus on the left side of the page. Whereas tabs help navigate across pages in TRAIN, the list menus are aimed more at internal page navigation. Although not all lists will function this way, most list items, when clicked, will refresh the content of the current page and will not move you to a new page. For example, if you navigate to the *Resources* tab, you will then use the list items on the left to select individual resources.

The screenshot shows the CDC TRAIN website interface. At the top, there are navigation tabs: Home, Calendar, Competency Assessment, Resources, Discussions, Help, and Administration. A search box is located on the right side of the header, labeled 'Search', with a text input field for 'Keyword or Course ID' and an 'Advanced' button. Below the header, the main content area is divided into sections. On the left, there is an 'Announcements' section with a list of 'Upcoming Events' and a 'Spotlight and Other Links' section. On the right, there is a 'testpaulone Dashboard' with a 'My Learning' section containing a table of courses. Callouts with green boxes and arrows point to specific elements: 'My Learning' points to the 'My Learning' section in the dashboard; 'Announcements and Upcoming Events' points to the 'Upcoming Events' list; and 'Spotlight and Other Links' points to the 'My Learning' section in the dashboard.

**My Learning**

**Search**

Keyword or Course ID

**testpaulone Dashboard**

**My Action Items**

**My Learning**

Course Name	Status	Format
2005 09-CMED PHGRs "Toward an Epidemiology of Elder Abuse"	In Progress	Webcast (on demand)
Stress and Management Techniques Module 1024346	In Progress	Web-based Training - Self-study
WPHN Orientation: 1. PHN Practice Model	Post-Assessment Pending	Web-based Training - Self-study

**Announcements and Upcoming Events**

**Spotlight and Other Links**

## Groups

The TRAIN grouping structure is an essential part of TRAIN. So much so, that it is beneficial for end users to at least be aware of it. *Everything* within TRAIN, from user accounts, to course links, to announcements, has a group structure assignment. The benefit is that users can only access content assigned to the same group as their user account. For example, in the group structure illustrated to the right, imagine a user assigned to the Craig County group. Users in this group will see any content assigned to Craig County, Alleghany or Virginia. A user in the Craig County group will not see content assigned to Arlington, Clinton Forge or any other region or county. If you are trying to locate a piece of content, but cannot, it's possible that content has not been opened to your group. This is something your TRAIN administrator can clarify and correct.



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## Managing Your TRAIN Account

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Some users are very involved in managing their TRAIN account. Some users only access their account once a year for recurring training requirements. The amount of user involvement with TRAIN varies greatly. Fortunately, if you're a seasoned pro or seldom visitor, managing your TRAIN account is a piece of cake!



After logging into your TRAIN account, on the Home page, you should notice a section of the page called *Dashboard*; there is also a **My Account** link in the upper right corner of the banner. This is where most of your actual account management will stem from.

### My Account

In the TRAIN banner, you will notice a **My Account** link. Use this link to access the My Account management interface. Within the My Account management interface, there are three tabs:

- Details
- Groups
- My Profile

The sections below will outline what information is accessible for each tab in the

My Account management interface. When making changes to any tab in the My Account management interface, be sure to use the 'Save and Back' button at the bottom of the page to save your changes. You can also use the 'Cancel' button to move back to the TRAIN Home page without saving you changes

#### Details

Within the Details section of the My Account management interface you can adjust the following personal information:

- First and last name
- Account password
- Personal title, organization and department information
- Address data
- Contact email and telephone
- Password security question

The screenshot shows the "My Action Items" section of the TRAIN account interface. It has a dark red header with the text "My Action Items" and a right-pointing arrow. Below the header is a dropdown menu labeled "My Learning" with a downward-pointing arrow. Underneath is a table with three columns: "Course Name", "Status", and "Format". The table contains three rows of course information. Below the table are three buttons: "TRAIN Transcript", "Archived Courses", and "Current Courses". At the bottom of the section are five more dropdown menus, each with a right-pointing arrow and the following labels: "My Certificates", "My Training Plans", "My Surveys", and "My Links".

Course Name	Status	Format
2005 09:CMED PHGRs "Toward an Epidemiology of Elder Abuse"	In Progress	Webcast (on demand)
Stress and Management Techniques Module 1024346	In Progress	Web-based Training - Self-study
WPHN Orientation: 1. PHN Practice Model	Post-Assessment Pending	Web-based Training - Self-study

Within the *Details* section, you can also request the Course Provider and Conference Presenter roles. The details of this process are discussed below in the *Becoming a Course Provider* and *Becoming a Conference Presenter* sections of this handbook.

## Groups

The Groups section of the My Account management interface will show your state's grouping structure. This will appear as a nested tree (meaning groups can have parent, child and sibling groups). Groups to which you are assigned will appear as bold within the tree.

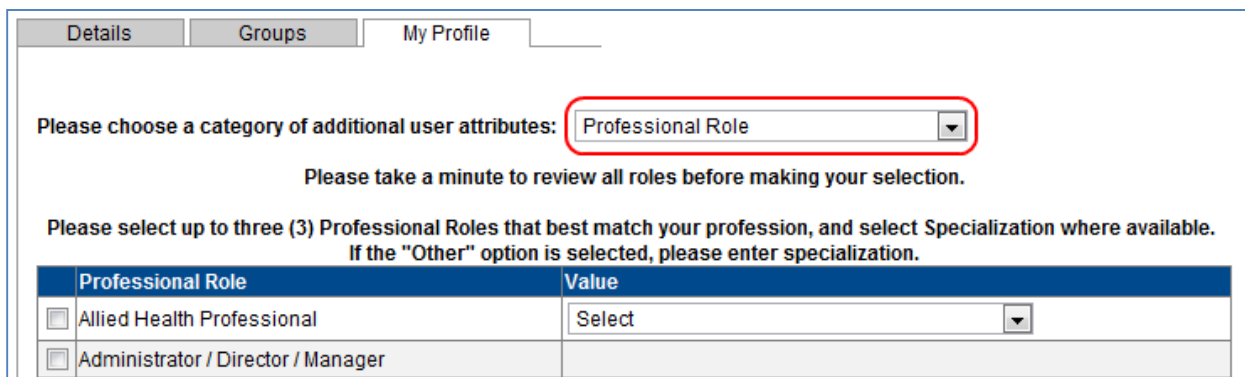
Below the group tree are two buttons, 'Edit' and 'Edit Primary Groups'

- Use the 'Edit' button to completely reset and redefine your group assignment
- If you are assigned to multiple group, you can use the 'Edit Primary Groups' button to define your *primary role*. For example if you are assigned to two different departments, but most of your work is for just one department, you can list that department group as your primary group.

## My Profile

The My Profile section of the My Account management interface allows you to set your *user attributes*. User attributes can be customized per state; but there are also national user attributes that every user must provide. User attributes are a way for state administrators to collect information that falls beyond the scope of typical account data.

At the top of the My Profile interface, there is an attribute dropdown menu. Use this menu to change which attribute you want to edit. Selecting a new item in the dropdown will change the selection options shown on the page.



The screenshot shows the 'My Profile' tab selected in a navigation bar. Below the navigation bar, there is a dropdown menu labeled 'Please choose a category of additional user attributes:' with 'Professional Role' selected. A red box highlights the dropdown menu. Below the dropdown, there is a message: 'Please take a minute to review all roles before making your selection.' Below this message, there is another instruction: 'Please select up to three (3) Professional Roles that best match your profession, and select Specialization where available. If the "Other" option is selected, please enter specialization.' Below the instructions is a table with two columns: 'Professional Role' and 'Value'. The table has two rows: 'Allied Health Professional' with a 'Select' dropdown, and 'Administrator / Director / Manager' with an empty field.

Professional Role	Value
<input type="checkbox"/> Allied Health Professional	Select
<input type="checkbox"/> Administrator / Director / Manager	

## Becoming a Course Provider

One of the unique things about TRAIN is that *any* user can potentially become a Course Provider. But what exactly is a Course Provider? Truth be told, the Course Provider role varies quite a bit from state to state. Nevertheless, a Course Provider can generally be thought of as a user within TRAIN who:

- Creates and uploads learning content to TRAIN
- Maintains existing learning content to keep it current and relevant

- Manages Course Rosters and Course Registration statuses
- Assists users with accessing uploaded content
- Works with TRAIN administrator to accomplish the goals of TRAIN in that state.

**TO BECOME A COURSE PROVIDER:**

1. Becoming a Course Provider is an approval process. You will need to submit your TRAIN account, along with some additional details, to your TRAIN administrator. If your administrator finds your application appropriate, they will approve you as a Course Provider. TRAIN administrators can also decline or request more information about your Course Provider status.
2. Login to your TRAIN account go to the Home page
3. Click the **My Account** link in the TRAIN banner.
4. Scroll to the bottom of the My Account management interface and click on *Request Course Provider Role*. Upon clicking this link, a new form will be revealed at the bottom of the page.
5. Fill out the Course Provider form as completely and accurately as possible.
6. Click **Save**.
7. Your request will now be sent to your TRAIN administrator for approval. You will receive a confirmation email as will your administrator.

Please choose your secret question and provide a ONE WORD answer.  
You will be asked this question if you forget your password.

Question:\*

Answer:\*

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I would like to receive notifications about the site updates by email:

I would like to receive annual notifications to keep my account up to date:

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[Course Provider role](#)

[Request Course Provider Role](#)

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[Conference Presenter role](#)

[Request to Become a Conference Presenter](#)

## Becoming a Conference Presenter

TRAIN Conferences are a relatively new feature. The Conference package allows Conference Providers (i.e., those folks who create and manage the conference record within TRAIN) to create a conference, give it sessions and then assign sessions to individual Conference Presenters. If you would like your name considered as a potential Conference Presenter, you will first need to submit your name for approval on the Conference Presenter list.

The steps for doing this are almost identical to the steps for becoming a Course Provider.

#### TO BECOME A CONFERENCE PRESENTER:

1. Becoming a Conference Presenter is an approval process. You will need to submit your TRAIN account, along with some additional details, to your TRAIN administrator. If your administrator finds your application appropriate, they will approve you as a Conference Presenter. TRAIN administrators can also decline or request more information about your Conference Presenter status.
2. Login to your TRAIN account go to the Home page
3. Click the **My Account** link in the TRAIN banner
4. Scroll to the bottom of the My Account management interface and click on *Request to Become a Conference Presenter*. Upon clicking this link, a new form will be revealed at the bottom of the page.
5. Fill out the Conference Presenter form as completely and accurately as possible.
6. Click **Save**.
7. Your request will now be sent to your TRAIN administrator for approval. You will receive a confirmation email as will your administrator.

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## Managing Course Registrations

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Course Registrations are a huge part of TRAIN. Arguably, this is *why* users come to TRAIN, so they can register for courses and have their progress tracked and rewarded! This portion of the handbook covers the basics of registering for a course, launching the course and receiving credit for the course.

**Important:** Please note that the content posted on TRAIN is from third party providers. KMi cannot support or assist with technical issues that may arise in the course. If you do encounter an error within a course, please contact the course provider.

### Registering for Courses on TRAIN

The Course Registration process can take on many forms. Course Registration also has a variety of access points. In short the process of Course Registration is pretty self-explanatory; if there is a course on TRAIN that you would like to complete, you will need to register for that course. This will place you on the Course Roster. The first step to registering is locating the appropriate course. If you have already located the course you want to register for, feel free to skip to the Course Registration section of this handbook.



### Locating Courses on TRAIN

There are a handful of ways users can locate courses on TRAIN:

- Course Search/Advanced
- Calendar
- Course ID
- Direct Link
- Administrator Assignment

### Course Search and Advanced Tab

(Course Search is only available for some affiliates who have requested it; however, the Advanced tab links to the same interface)

To search for a course, you do not actually need to be logged in to your TRAIN account. However, we recommend that you do first login as login will be required to complete any Course Registration. More so, the search process has several search criteria for you to choose from. This means that you can search by different items such as, intended audience, by the course format, by the date the course was released, etc. This section will not cover each individual search criteria, but the inputs for each function in a very similar way. It's simply a matter of which criteria you want to search by. If you don't find what you're looking with one type of criteria search, feel free to try the others!

**TO SEARCH FOR A COURSE:**

1. Click the **Course Search or Advanced** tab in the top navigation bar; or simply enter your key word into the search field in the navigation bar.
2. If you use **Course Search or Advanced**, on the following page you can click **Browse** to see a full list of all courses. Or, you can click search to do a normal keyword search. Lastly, you can choose from any of the relevant criteria listed on the left. Choosing any of the search criteria options will open the parameters page for that criterion. Simply enter your parameters and click **Search**
3. The resulting list will display all courses that meet your search criteria. Click on the name of the appropriate course and you will be taken to the Course Details page
4. **Note:** For security purposes, the following words and characters are **not included** in search terms:

-	>	are	do	i	n	since	u	you
!	0	as	e	if	never	some	under	your
#	1	at	each	in	now	still	up	z
\$	2	b	f	into	o	such	v	
%	3	be	for	is	of	t	very	
(	4	because	from	it	on	take	w	
)	5	been	g	j	only	than	was	
*	6	before	get	k	or	that	way	
,	7	being	got	l	other	the	we	
.	8	between	h	like	our	their	well	
/	9	both	had	m	out	them	were	
?	a	but	has	make	over	then	what	
@	about	by	have	many	p	there	where	
\	after	c	he	me	q	these	which	
^	all	came	her	might	r	they	while	
_	also	can	here	more	s	this	who	
	an	come	him	most	said	those	with	
+	and	could	himself	much	same	through	would	
<	another	d	his	must	see	to	x	
=	any	did	how	my	should	too	y	

**Note:** Under the Course Search or Advanced functions, there is also a **Browse My State** option. Selecting this option will return all courses that originate from your affiliate state.

**Note:** State administrators also have the option to request that subgroups within their state be listed as search filters on the course search and calendar tabs. When this option is on, the requested group name will appear as an additional filter on the search pages. This filter will not remove courses that you have administrator rights to, but for end users, the filter will show a list of courses that are explicitly available for the defined group. The filtered course list will not include courses inherited via national availability





## Saved Search Criteria


TRAIN allows users to save their search criteria. This is useful if you will be searching for the same type of course multiple times. With saved search criteria, you don't need to re-pick your search parameters; simply rerun your saved search.

Saved searches can also be set to send you an email notification when new courses are added to TRAIN that meet your saved criteria. This is particularly useful if you want to be notified when new courses on a particular subject are released. Turning on saved search notifications can save you the hassle of rerunning searches.

### Saved Search Criteria

#### TO SAVE, EDIT AND RUN SEARCH CRITERIA:

  [Advanced Search](#)

1. Run your course search as normal.
2. Click **Save Criteria** after the search completes and the list of courses is returned.
3. Provide a name for the search criteria you wish to save.
4. There will be a checkbox option for receiving email notifications about new courses that meet your saved criteria.
5. To run a saved search criteria, simply click on the name of the saved data. When rerunning a search, the results will be updated live with the dynamic data inputted by the course providers
6. To edit any aspect of the saved search criteria, click the **Pencil Icon** () next to the appropriate criteria. To delete a saved search criteria, use the **Delete Icon** (x) next to the appropriate criteria.

## Search by Course ID

Every course in TRAIN has a Course ID. Sometimes, if you know exactly what course you're looking for; finding it by Course ID can be the easiest way. Over the years, we've found that TRAIN administrators prefer Course IDs because they are unambiguous. Search by Course ID is only available after you have logged in.

#### TO SEARCH BY COURSE ID:

1. Login to your TRAIN account
2. Look to the TRAIN navigation bar
3. Enter the Course ID into the *Keyword or Course ID* field on the right side of the navigation items.
4. Click the search icon or hit enter on your keyboard
5. This will return a *one* course list, of the course record that matches your inputted Course ID. If no courses are returned, then the Course ID you entered might be incorrect or that course might not be available at the time.
6. Click on the name of the course and you will be taken to the Course Details page.

## Calendar Tab

**Important:** Not all affiliate states have access to the Calendar. For clarification on whether your state has access to the Calendar, please consult your TRAIN administrator.

Within TRAIN, there are several formats a course can take on. Formats describe *how* the course is delivered. For example, an eCourse differs from a live event webinar. eCourses are available always and can be accessed on demand; whereas, live event webinars are only accessible for a specified period and at a specified location (either web or physical address). The Calendar, specifically, is designed to list *live event* courses. You will not find on demand eCourses listed in the calendar.

If your state has access to the Calendar, you do not necessarily need to login to see it. However, we recommend that you do login as any course will require login to complete the registration process.

#### HOW TO LOCATE COURSES IN THE CALENDAR TAB:

1. Login to your TRAIN account
2. Click the **Calendar** tab in the top navigation bar
3. Notice the *key* in the upper left corner. This will help distinguish course availability.
4. Locate the day/month/week for which the appropriate course is scheduled. Use the **< Previous Month** and **Next Month >** links to navigate the Calendar.
  - a. You can also select a specific day from the mini calendar on the left side of the page.
  - b. Selecting a specific day will reveal a list of all sessions scheduled for that day. Simply click on the course name to access the Course Details page for that course.
5. Click on the time/session you wish to attend. This will take you to the Course Details page for that course.
6. On any day that has more than three sessions scheduled you can also click on the **Additional Info icon** (☰). This will reveal a full list of all sessions scheduled for that day.

**Note:** conferences listed on the calendar will show under a single conference name. The conference name will appear on any day that has sessions scheduled. The individual conference sessions do not show on the calendar.

#### Course Registration Options

Once you have located the appropriate course, you will need to register for it. Registering for a course will create a unique registration record and will add your account to the Course Roster.



On the course details page, you will notice several tab. To register for the course, click the **Registration** tab.

From here, there are a variety of options you may have. All of these options will depend on how the Course Provider has setup the course. If you have question about registering for the course, please use information provided on the **Contacts** tab.

The specific registration process will also vary as per the Course Format. If the course is an online, on-demand course, you will see a **Launch** button. If the course is a live event course, such as a classroom

event or webinar, you will have to choose from a list of times and locations. In this instance, you will have a **Register** button.

For online courses, clicking the **Launch** button will start the course in a new window.

### **Course Credits**

If the course offers any type of credit, a drop down menu will appear on the **Registration** tab. You will need to select a Credit Type from the dropdown menu before registering for the course.

### **Prerequisites**

Some courses have prerequisites that must be completed before you can register for the course at hand. These are listed on the **Registration** tab.

### **Multi-Step Registrations**

Some courses include a “second step” as part of the registration process. This can be anything from the need to register at a third party website, to making a course related fee payment. If a second registration step is required, there will be a button: **Go to Step 2 of Registration**.

### **Waitlist Registration**

Waitlists are a feature only available for live event courses. This option is made available at the discretion of the Course Provider.

Live event courses often have a maximum number of seats available. If the maximum number of seats is filled, there may be a waitlist option available. If this option is available you will see a button: **Add to Waitlist**. Click this button to be added to the course waitlist.

Waitlists can function one of two ways: manual registration and automatic registration.

If the Course Provider has opted for manual registration of the waitlist, when a seat becomes available, an email is sent to all users on the waitlist and then the open is redistributed on a first come first serve basis.

If the Course Provider has opted for automatic registration, if a seat becomes available, the system will automatically register the next user “in line” on the waitlist and an email is only sent to that one user.

### **Approval Codes**

Some courses may require a code to authenticate your registration. If you do not know the code, you cannot register for the course. If this feature is activated for any course, on the **Registration** tab, you will see an entry field for the code. You must enter the code before registering; and then must complete the registration process. Only entering the code will NOT register you for the course.

### **Administrator Approvals**

Some courses require manual administrator approval. In these instances, you will see a **Get Approval** button. Clicking this button will send a note to the appropriate administrator about your request. You will

also receive email confirmation. If your request is approved, then you will have access to the course. If your request is declined, access to the course is not allowed. You will receive an email notice about the approved or declined status of your request.

## Conference Registration

The steps for locating a conference in TRAIN, are the same as for courses.

Once you have located the appropriate conference, click the conference name and select the **Registration** tab. If the conference is available for registration, you will see an option **Register for Conference**. Click this option to begin your registration process for the selected conference.

This will show the available sessions for that conference. If the conference uses Tracks, these will also be listed here.

Tracks are a series of conference sessions that have been “grouped” together by the conference provider. If you are unsure what Track to register for, please contact your TRAIN administrator.

If the conference includes mandatory sessions, these will appear on the session list as “added” to your schedule. You cannot remove mandatory sessions from your conference registration.

To add a specific session to your registration, click the **Add** button next to the appropriate session.

Once you have selected your Track or the appropriate sessions, click the **Next** button at the bottom of the page.

If the conference provider has requested any additional information (such as dietary or access needs), you will be able to provide this information now. Some information requests may be required and some may be optional. Once you have fulfilled all additional information requests click the **Next** button at the bottom of the page.

You will now see a summary of your TRAIN account profile details. Please take a moment to ensure these details are correct and then click the **Next** button at the bottom of the page.

The final page is the confirmation page. It shows a summary of the conference sessions that you have selected. If the summary page is accurate, click the **Complete Registration** button at the bottom of the page.

## Overlapping Conference Sessions

Many conferences may include a number of individual sessions with multiple scheduled times, allowing the user to determine their own overall conference schedule using the times listed. In the unlikely event that a user selects multiple sessions with the same scheduled time, an alert will appear in red lettering, stating: **Warning: There are overlapping sessions!** It is up to the user to ensure that their conference schedule does not include overlapping session times.

## My Learning

The *Dashboard* section of the TRAIN Home page is where most of your course management will take place. Here you will find access to your course Certificates, Training Plans, in progress courses and more. You can also access Evaluations and Assessments from this section of the site.

### My Learning

Your **My Learning** section contains recent, active Course Registrations. To see all registrations, click the **Current Courses** button. Each Course Registration will be displayed by name, format, and the Registration Status of the course.

Next to each course listing is an **M** button. This is to **Manage** your individual course registrations.

Type	Name	Status	Manage
Online	<a href="#">_standalone assessment test (ps)</a>	In Progress	
Conference	<a href="#">2010 TAC Annual Meeting</a>	In Progress	
Compilation	<a href="#">Anti-Stigma – Addiction Campaign</a>	In Progress	
Online	<a href="#">Applied Epidemiology of Terrorist Events</a>	In Progress	
Online	<a href="#">KIPP Site Exam (1017138)</a>	Post-Assessment Pending	
Online	<a href="#">Psychosocial Impact of Disasters and Catastrophic Events Module -1008507</a>	In Progress	
Online	<a href="#">Region 3 MCI Trailer Course</a>	In Progress	
Online	<a href="#">VDH: VDH's Role in Emergency Response</a>	In Progress	

The Status of each course in My Learning depends on a number of factors. For example, a course might require you to get approval for a course or take a Pre-Assessment. In either of these cases your Status will be *Approval Pending* or *Pre-Assessment Pending*, respectively. Once you have met any registration requirements and have been placed into the Class Roster, your course Status will be in progress until the course has been completed.

From the My Learning screen you are also able to add Course Session information to your Personal Calendar by clicking the Calendar Icon next to the Course Name.

**Note:** Not all states have the Personal Calendar feature. Contact your state TRAIN Administrator for more information.

The **Management (M)** link allows you to update your progress for each course in your My Learning screen. To manage a particular course, simply click the **M** button to the right of the Course Name. The Course Registration Management screen allows you to:

- View your Registration Status.

- View and update your selected Credit Type: In order to change your Credit Type, select the Credit Type you wish to apply to the course from the Credit Type dropdown, and click **Update**.
- Mark your course as **Completed**: Click the **Completed** button to complete your course. This will move the course into your Transcript where a Course Provider will be able to *Verify* your completion.
- Move the course into your **Archive**: Click the **Archive** button to move the course into your Archives. This deactivates the registration
- Withdraw from the course: Click the **Withdraw** button to withdraw from the course. Remember to do this any time you are not able to attend a course, as there could be waitlisted users who could then attend.

**Course Registration Management**

You have registered for a course:  
 Animal Bites and Rabies

**Registration Status:** In Progress  
**Chosen Credit Type:** CEU/CE: 0.05

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If you would like to change credit type please select  and click

To mark this course as "Completed" please click

To mark this course as "Archived" please click

To withdraw yourself from this course please click

### Conference Registration Management

Conferences are setup one of two ways: either each session in the conference must be completed before the overall conference can be completed; or, if the administrator allows, you may be able to update the overall conference to a completed status, which will automatically update all conference sessions to complete. The on screen instructions will guide you through the conference session completion requirements.

### My Training Plan

The **My Training Plan** section contains all of your *Training Plans*. A Training Plan is a group of courses that have been identified by an administrator – you must complete all courses in order to complete the Training Plan.

Training Plans can be assigned to you directly by an Administrator or you can sign up for a Training Plan through the Course Search.

**My Training Plan**

= Added Manually  
 = Added By Administrator  
 = Manage course registration

**Tip:** To sort by any column, click the column heading. Or use default order  
**Tip:** You must register for each course within the training plan by clicking on the title.

	Course Title	Format	Target Completion	Status	Completion date
<input type="button" value="Remove"/>	PHF New Hire Training	Training Plan	Set		
<b>PHF 101</b>					
	_PHF Demonstration Course (required)	Web-based Training - Self-study	-	Not Started	
<b>Advanced PHF Knowledge</b>					
	_Advanced Test Course (required)	Web-based Training - Facilitated	-	Completed	5/21/2007
<b>WVBPH SNS Preparedness Training Plan</b>					
<b>Required SNS Courses</b>					
	The Strategic National Stockpile (required)	Webstream/Archived Webcast	-	Not Started	
	The Strategic National Stockpile Program (required)	Webstream/Archived Webcast	-	Not Started	
	Working In a POD (required)	Web-based Training - Self-study	-	Not Started	

The graphic above illustrates:

1. Training Plans you have added to your own account through the Course Search are identified by the **Personal Icon** (). You can remove these plans from your list at any time.
2. Training Plans added to your account by an administrator are identified by the **Administrator Icon** (). These plans *cannot* be removed from your account and you must complete the Training Plan by the Target Completion Date to receive credit.
3. The Target Completion Date can be set or edited unless it has been established by an administrator.
4. You must still open and register for each individual course (by clicking the course name) to continue through the plan. Having a Training Plan assigned to your account does not automatically register you for each course.
5. Training Plan Administrators are able to monitor your progress through the plan – be sure to meet your Target Completion dates!

**My Surveys**

For more information on how to use the **My Surveys** link, please see the **TRAIN Surveys** section below

**Transcript**

Your **Transcript** lists all Course Registrations that are completed; as well as any Non-TRAIN Courses that have also been entered for your account.

To export your transcript to a PDF, simply click the **Export** button on the Transcript page. This will allow you to download a PDF list of your completed Course Registrations and Non-TRAIN Courses.

You can also post *Reviews* from your Transcript. To do so, simply click the **Reviews** button for the appropriate course.

## Non-TRAIN Courses

One aspect of TRAIN is the ability to list courses, in your Transcript, that are not actually found on TRAIN. This is useful for tracking training courses and external learning you have taken outside of TRAIN

### TO ADD NON-TRAIN COURSES TO YOUR TRANSCRIPT:

1. Login to your TRAIN account and access your **Transcript**.
2. Click the **Add** button to the right of the Non-TRAIN Courses header.
3. On the resulting page, fill in each field, including required (\*) fields.
4. When you have finished entering the course information, click **Save**.
5. The course will now be displayed in your transcript under Non-TRAIN Courses.

**Note:** Non-TRAIN courses must still be verified by an Administrator. Once an Administrator has verified the information, you will not be able to make changes to the entry.

## User Transcript Certificate Uploads

TRAIN users have the ability to upload certificates to courses and non-TRAIN events listed on their Transcript page using the “Upload External Certificate” function.

### UPLOAD EXTERNAL CERTIFICATE FUNCTION:

This feature can be found on the Transcript page:

Home→Dashboard→My Learning→TRAIN Transcript


1. The “Upload External Certificate” button will appear next to any course that does not have a certificate assigned to it.


**Note:** For registrations and non-TRAIN events where a user manually uploads and external

### Non-TRAIN Course Details

\* = required fields.

Title:\*

Start date:\*  

Completion date:\*  

Course URL:

Course Format:

Course Provider Name:\*

Course Grade Points:

Course Grade Percentage:  %

Credit Type:\*

Amount:\*

Contact Name:\*

Contact Phone:

Contact Email:

Additional Info:

Verified:



certificate, the Upload External Certificate button will not disappear. Instead, if a user uploads an external certificate once, and then runs the upload process again, the most recently uploaded certificate will be saved and all previously uploaded certificates for the registration (or non-TRAIN course) will be deleted.

2. When the “Upload User Certificate” button is clicked, a window will appear to browse the file path and upload the certificate.
3. Find the appropriate file by clicking ‘Browse’.
4. Once the file is selected, click ‘Upload’.
  - a. The Certificate will now be uploaded and be available to view or print in the ‘Certificates’ page in “My Learning Record”.

In the “Certificate” page, the certificate will appear followed by the below indicators:

1. (Externally Uploaded) – For TRAIN courses that simply did not have a certificate assigned in the course.
2. (Non-TRAIN course) – For non-TRAIN courses where a user has uploaded an external certificate.

### **Certificates**

Some courses on TRAIN offer Certificates upon completion or verified completion of the course. Any Certificate you earn through TRAIN will be stored in your **My Certificates** page. There are two different delivery methods for Certificates: Automatic and Manual. Automatic certificates will appear on your Certificate page as soon as the course is completed. Manual Certificates will not appear on your Certificate page until after the appropriate TRAIN administrator has verified your completion of the course. If you have any questions about what kind of Certificate any given course might have, please contact the course provider or listed course contact.

#### **TO VIEW OR PRINT A CERTIFICATE:**

1. Login to your TRAIN account and access the **My Certificates** link on the TRAIN Home page.
2. This will reveal a list of recent Certificates.
3. Click the Certificate print icon to the right of the page.
4. This will open or download a PDF version of the Certificate.

**Note:** Inactive registrations (i.e., Course Registrations which appear in your Course Archive) will not have any Certificate available.

### **Course Archive**

Your Course Archives is a repository for any courses that you have chosen to stop participating or courses that you have requested registration for and had your registration request declined.

If you wish to re-activate any course you have chosen to archive, simply click the Resume button and it will be moved back into your My Learning.

## Re-Launching Courses

Many courses listed on TRAIN are built such that you can start, stop and resume the course without losing your progress. You can quit the learning content, come back to it later and the system will pick you up, in the course, exactly where you left off.

### TO RE-LAUNCH A COURSE:

1. Login to your TRAIN account and click the **My Learning** link on the TRAIN Home page.
2. Click the **In Progress** link, that is in row, with the course you wish to re-launch
3. The course should open in a new window.
4. If the course is a live event course, you will be taken to the

## Post-Course Options

Once you have completed the learning material for a course, there are a handful of post-course functions you can take advantage of. Some of these functions might be required by the course provider. If this is the case, you must complete these additional steps to receive a certificate/credit for the course.

### Assessments and Evaluations

It's possible the Course Provider will require you to take an assessment of evaluation to fully complete all requirements. If this is the case, please see the Launching Assessments and

### Accessing Submitted Answers

By Default, when you have complete and assessment, you will have access to the answers you submitted and the correct/incorrect status of each answer. These details are available in the Transcript page.

However, there is an option, available to your administrators, which may prevent you from accessing your assessment results. If this option is ON, you will not have any access to your assessment answers.

Questions about whether or not you can access your assessment results should be directed to the course contact

Launching Evaluations sections below.

### Course Reviews

Course reviews are an important part of the TRAIN Community experience. Course reviews help other users know how the course is being received by the TRAIN Community. They are also helpful to the administrators and the feedback given in course reviews is used to improve course content, navigation and the general course experience

Some courses will automatically prompt you to submit a review (this will be determined by the course provider). Other courses may require that you access the course review tab manually as is described below. If a course does have an automatic review prompt, you can submit a review in that prompt or save

it for later. If you save the review prompt, a notification message will appear on your TRAIN home page about the pending review.

**Note:** Keep in mind that course reviews should be directed to the course provider and should focus on the course content. Comments about TRAIN and the TRAIN system are no appropriate for course reviews.

**TO POST A COURSE REVIEW:**

1. Login to your TRAIN account
2. Located the appropriate course in TRAIN
3. Select the **Reviews** tab on the Course Details page
4. Click the **Add** review button.
5. Fill out the review form as completely and accurately as possible. Please include a rating, title and comment.
6. Lastly, click **Submit** to finalize the review. Or, use **Cancel** to go back to the previous page without saving your entry.

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## Assessments and Evaluations

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TRAIN provides learners, course providers and administrators the option to add and take assessments and evaluations with their courses. Assessments and evaluations are



Item Name	Number of pending items
Assessments	1

similar; however, with an evaluation, there is no right or wrong answer. On an assessment your answers will be scored and you will receive a final percentage or points based score for the assessment.

**Note:** as you are accessing your assessment (pre or post) or evaluation, there will be onscreen instructions for launching the specific assessment or evaluation. There will be additional onscreen instructions within the assessment or evaluation on how to move through the process and how to answer each question. Simply follow these onscreen commands and taking the assessment or evaluation should be a breeze!

### Launching Assessments

TO LAUNCH AN ASSESSMENT, YOU HAVE A VARIETY OF ACCESS POINTS:

- On the **Course Details** page, where you originally registered for the course, under the **Registration** tab, there will be an assessment button.
- If you click the **My Learning** link on the TRAIN Home page Dashboard, you will see which recent courses have assessments that need to be completed.
- On the TRAIN Home page, if you have an assessment pending, a red alert notice will appear within the My Action Items section of the TRAIN dashboard.

### Pre-Assessments

Pre-Assessments are always mandatory. You cannot proceed with the remainder of the course without first completing the pre-assessment. Please see above for steps to launch an assessment.

### Post-Assessments

Post assessments are often mandatory, but not always. If a post-assessment exists, chances are you will need to complete and pass the post assessment before receiving a certificate for the course. Please see above for steps to launch an assessment. Some post-assessments allow for multiple attempts to pass the assessment. If this is the case, you will see the number of attempts you have used and the number of attempts remaining. You can launch an assessment with multiple attempts, the same way you would launch a normal assessment.

## Time Limits

Some Assessments, both pre and post, have time limits. This is the total amount of time you can spend to answer all questions in the assessment. If you fail to complete an assessment in the allotted timeframe, your answers will be submitted as is and incomplete answers will be scored as incorrect. Please keep in mind, that assessment time restrictions are always added by the third party course provider. If you have questions about these limits or want to request special accommodation, please contact the listed course contact or Course Provider.

## Attempt Limits

Similar to the time limits, TRAIN also has an option to impose attempt limits on both pre and post assessments. An attempt limit is the number of times an assessment can be *launched*. There is often confusion about this. An attempt limit does *not* mean you get X number of attempts to complete and pass the assessment. It simply means you can launch the course *without* completing it, X number of times. Once you complete an assessment, it is done; the only way to retake the assessment is to reregister for the course.

## Accessing Submitted Answers

By Default, when you have complete and assessment, you will have access to the answers you submitted and the correct/incorrect status of each answer. These details are available in the Transcript page. However, there is an option, available to your administrators, which may prevent you from accessing your assessment results. If this option is ON, you will not have any access to your assessment answers. Questions about whether or not you can access your assessment results should be directed to the course contact

## Launching Evaluations

**TO LAUNCH AN EVALUATION, YOU HAVE A VARIETY OF ACCESS POINTS:**

- On the **Course Details** page, where you originally registered for the course, under the **Registration** tab, there will be an evaluation button.
- If you click the **My Learning** link on the TRAIN Home page dashboard, you will see which recent courses have evaluations that need to be completed.
- On the TRAIN Home page, if you have an evaluation pending, a red alert notice will appear within the My Action items section of the TRAIN dashboard.

Evaluations function almost identically to assessments. However, evaluations only appear after a course. There are no “pre-evaluations” as there are pre-assessments. Just list assessments, evaluations will provide on screen instructions and a set of intuitive navigation buttons to progress through the evaluation.

## Competency Assessments

Recently, access to the Core Competencies for Public Health Professionals (Core Competencies) assessment has been added to the TRAIN website. Here, users can both gain access to and upload their

completed assessments. The uploaded competency assessments will be saved in the user's **My Learning** section for future reference. To upload a completed competency document, simply navigate to the **Competency Assessment** tab and upload the file where prompted.

## TRAIN Surveys

TRAIN Surveys are designed to gather input on a wide range of topics. You may find the option to participate in a survey on your TRAIN Home page. Surveys are not mandatory, and it is your choice if you wish to take and complete a survey.

### Survey Dashboard

The Survey Dashboard is available on the TRAIN Home page and displays all surveys that are either newly available to you or those that require some sort of interaction on your part. If you wish to participate in a survey click the **Launch Survey** link. If you do not wish to participate, and want to remove it from your Dashboard, click the **Decline** link.

When a new survey becomes available in TRAIN, a popup alert will notify you of the survey upon your next login. Once you acknowledge the new survey by closing the pop-up window you will not be notified again.

All surveys and related survey data can be more thoroughly reviewed and managed in the new **My Surveys** module within TRAIN Home page dashboard.

### My Surveys

Similar to My Learning, **My Surveys** (in the *Dashboard* section of the TRAIN Home page) contains all survey data related to your account. This includes surveys that are available for you to take, surveys that you have started taking but have not yet completed, completed surveys (saved for archival purposes), and other statuses.

By default when you enter My Surveys you will view *all* survey data. You can use the radio buttons at the top of the page to filter this list and more easily find specific surveys.

The following is a list of all available filtering options and exactly what type of surveys they will display:

1. **All** – every survey, regardless of its status.
2. **Available: Not Started** – these are surveys that are available for you to take, but that you have not launched or started. If you remove a survey from the dashboard and you later decide that you wish to take the survey, you can find that survey here (provided it is still available).
3. **In Progress** – these are surveys you have started but have not yet finished.
4. **Pending Review** – these are surveys that you have completed but are awaiting review from another TRAIN user (see the section Surveys with Review below for additional information).

5. **Reviewed** – these are surveys that have been reviewed by another user in TRAIN, and require you to view the results of each question (see the section Surveys with Review below for additional information).
6. **Completed** – these are surveys that have been completed, meaning every requirement has been met. For surveys that require a review, it means that both the review and your analysis of the review have all been completed (see the section Surveys with Review below for additional information).
7. **To Review** – It is possible that another TRAIN user could select you to review their survey. If this happens, any survey that is awaiting your review can be found here (see the section Surveys with Review below for additional information).
8. **My Reviews** – If you have reviewed a survey in TRAIN, that survey is stored in the “My Surveys” module. This means that you can always return to a completed survey and review the submitted answers. All surveys that you have reviewed for other users can be found here (see the section Surveys with Review below for additional information).

In addition to the filtering options for display, the page will also display information related to each survey, tabled out in an easy-to-read format. For each survey you will see:

1. **Print** – no title is provided in this column, but you can click on the printer icon here to get a PDF document of the survey. **Note:** This option is only available if the survey manager has turned on the print function.
2. **Survey Name** – this will show you the name of the survey as defined by the survey manager. **Note:** This column will also display any links for interacting with the survey, such as **Launch Survey**.
3. **Start Date** – this will display the day you began working on a survey. For surveys that you have not started the date column will show “N/A.”
4. **Submitted Date** – this date is related only to surveys that require a peer review (see details in the section Surveys with Review below) and will display the date you submitted your survey results to TRAIN for review by another TRAIN user.
5. **Reviewed Date** – another date related to the review process, this date will display the date that the peer review was completed and returned to you.
6. **Submitted By** – when reviewing another user’s survey, this will display the TRAIN User Name of the user who requested you for their review.
7. **Status** – this is the TRAIN status for the survey, which corresponds to the filtering options defined above (In Progress, Not Started, Completed, etc.)

While the Dashboard is provided to you in order to make interaction with surveys easy and accessible, the My Survey module can be used for any action you might wish to take on a survey.



## Taking a Survey

When you do choose to take a survey, click the **Launch Survey** link either in the Dashboard or My Surveys and TRAIN will launch the survey in new window.

Below are a list of possible options, features, and elements of surveys that you could experience in surveys offered through TRAIN. Note that some features may not be available depending on how the survey was set up.

1. **Introduction Page** – the first page of the survey will always show you some basic introductory text. This text will be different for every survey.
2. **User-Type Selection** – some surveys might ask you to make a selection that more accurately defines you as a “user.” If the second page directs you to make a User Type selection, the Survey Manager should provide onscreen instructions as to how they expect you to make your selection and/or why the selection has been added.
3. **Survey Section Navigation** – some surveys might offer “quick links” to different sections within the survey. If this option is turned on, the third page of the survey will show you a list of all sections built into the survey. Click any section title to “jump” directly to that section
4. **Survey Section Title Page** – surveys that are organized into sections can also display a “title” page for each section. This page provides additional information specific to the questions within that section. This is not required, so it is possible to take a survey where no sections are defined.
5. **Navigation** – the following buttons each have a unique function within a survey. Remember, not every button is “turned on” for every survey:
  - a. **Navigation** – If this is enabled, you will see this button at the top-left of the survey window. This button allows you to roll over and see a list of sections within the survey. Rolling down over the sections will expand to show you a list of the questions within the survey. If this feature is available, clicking on a Section Title or Question will take you directly to that page within the survey.
  - b. **Exit** – this button will save your progress and leave the survey.
  - c. **Print** – this button brings up a PDF document of the survey that can more easily be printed.
  - d. **Help** – this button will open a document provided by the Survey Manager containing relevant help information
  - e. **“?” button** – the question mark here means that this button’s functionality, if turned on, is determined by the Survey Manager. It might be a button that says “Email Feedback” that links you to an email or another function. It is completely up to the Survey Manager what the button says and does.

- f. “<<” **button** – if you are taking a very long survey, and are allowed to “skip” from question to question, it can be hard to find questions you still need to complete. This button will take you to the “previous” unanswered question.
  - g. “<” **button** – this button will take you back one page in the survey
  - h. “>” **button** – this button will take you forward one page in the survey
  - i. “>>” **button** – if you are taking a very long survey, and are allowed to “skip” from question to question, it can be hard to find questions you still need to complete. This button will take you to the “next” unanswered question.
6. Other items to be aware of:
- a. Some surveys will allow you to skip from question to question. Others might require you to answer every question in a defined order.
  - b. Some surveys allow you to submit incomplete results, while others do not. For surveys that require an answer on every question, automatic reminders will appear and will list all questions that were skipped. Clicking a question in this list will take you directly to that question.

### Surveys with Review

TRAIN also has a unique type of survey that provides a peer-review experience for every TRAIN user that takes the survey.

#### THE BASIC STEPS FOR COMPLETING A SURVEY WITH REVIEW:

1. As a user, *you* choose to participate or not. If you want to participate, click **Launch Survey**, answer every question and submit your survey for review.
2. Once you have submitted your survey you **MUST** choose another user in TRAIN to review your survey. If you do not know another TRAIN user, that’s okay – many affiliates will provide a list of recommended or approved Survey Reviewers who can review your survey.
3. Specific steps for this process are provided below, after this basic steps list.
4. Once you have chosen a reviewer, they will need to “accept” your request and perform their review.
5. Once the reviewer has reviewed your survey and provided feedback, they will then return the survey to you.
6. You then need to open the survey, review their comments, and acknowledge that you have completely reviewed their comments.
7. Once all these steps have been finished, the survey is Complete and no further action is necessary. A copy of the survey (read-only) will remain in My Surveys as a *completed* survey AND in the selected reviewer’s My Surveys as a survey under *My Reviews*.

## Selecting a Reviewer

When taking a survey with a review, you will need to select a reviewer. The review will then parse your responses and provide their own comments.

### TO SELECT A REVIEWER:

1. Once you submit your initial survey results, the survey module will provide an option to select your reviewer immediately or to wait and select a reviewer later.
2. If you choose to select a reviewer later, the survey will remain in your Survey Dashboard until you have made a selection. This helps prevent “forgotten” surveys.
3. Once you are ready to select a reviewer, click the **Select Reviewer** link under the survey title. This will take you to a new page with a basic user search. There are two options for finding another user:
  - a. **Search all Users** – this allows you to search for any other account in TRAIN and ask the user to review your survey. In order to protect other TRAIN accounts, you can only search by the following fields:
    - i. Last Name
    - ii. First Name
    - iii. Organization
    - iv. Department
    - v. State
  - b. **View Approved Survey Reviewers** – as mentioned above, affiliates have the option of designating certain TRAIN users as approved or suggested Survey Reviewers. These individuals have been given a specific administrative role within TRAIN and they expect a larger number of requests to review other user’s surveys.
4. To search for users, first select the radio button corresponding to the desired search option (**All** or **Approved**), fill in any additional information you might know about the user you are looking for, and click the **Search** button. The page will refresh and a list of all users matching your search parameters will be displayed.
5. To select a user, click the button next to the user’s name and click **Select as Reviewer**.  
**Note:** If you don’t see the user you were looking for, alter your parameters and click the **Search** button again to refresh the list.  
**Note:** Even if you don’t find the desired reviewer on the first search, you must still select someone to review your survey. This is mandatory step for surveys that require a review.
6. If you have accidentally selected the wrong reviewer, or mistaken one TRAIN account for another, don’t worry – that user will be able to **Decline** the request and you can pick a new reviewer.  
**Note:** A selected reviewer has the right to decline any request. If a survey is declined by your selected reviewer, you will be asked to select another reviewer.

## Reviewing a Survey

If you do accept the responsibility for reviewing another TRAIN user's survey you must take your role seriously and provide valuable feedback to the user in a timely manner. If you have questions about a specific survey, please contact your TRAIN affiliate administrator or the survey creator.

### TO PERFORM YOUR DUTIES AS A SURVEY REVIEWER:

1. First click the **Accept** link within the Survey Dashboard to let the user know you agree to perform the review.
  - a. As mentioned above, you have the option of clicking the **Decline** button and returning the survey to the user.
  - b. If you are unsure who the user is, click on their TRAIN User Name under the Survey Title. This will display a limited list of user-details to protect user privacy. If you feel the user has selected you by mistake you can click the **Decline** button and return the survey to the user.
2. Once accepted, click the **Review Survey** button to launch the survey in a new window.
3. Reviewing a survey consists of the same steps, interface, and options as mentioned above for Taking a Survey, with the following exceptions:
  - a. The first page should display Introductory Text specific to you, the reviewer. This text is created for each survey by the Survey Manager, so it will be different for each survey. **Note:** the text here will be *different* from what the original user saw when taking the survey. Be sure to read the text carefully.
  - b. Each question has to two "modes" of view. The first mode is labeled as **My Answer** – this is the question that YOU, as the reviewer, are to answer.
  - c. You can flip to see the user's original answer by changing the view mode to **Original Answer**. Clicking this tab will flip the contents of the screen so you can see, in read-only mode, the user's original answer.
  - d. Based on the user's answer, their comments (if collected) and what you potentially know about the user, you are expected to answer the question as well.
  - e. Specific considerations, instructions, and expectations, from the Survey Manager, on this review process, should be provided to you by the Survey Manager. If you have questions, look for contact information within the provided **Help** information.
  - f. At the end of the survey you will also have a page to submit a **Final Review**. Here, you can summarize your thoughts and provide any insight or explanation as to how you answered the questions in the review.
  - g. The summation of your answers, comments, and final review should provide enough valuable feedback to the user to be considered an effective "Review." Again, the Survey

Manager should provide you more specific instructions and explanation when taking the survey.

4. Once you have answered every question and entered your Final Review, click **Complete Review** to finalize your part in the review process. This returns the survey to the original user so they can review your submission.

**Note:** TRAIN will always keep a copy of this survey in your My Surveys → My Reviews section so that you can always look at surveys you previously reviewed for other users.

### Looking at a Reviewed Survey

Once the selected reviewer has completed their review of your survey and submitted the feedback to TRAIN, the survey returns to your Survey Dashboard, as well as My Surveys → Reviewed. You must open the survey and look at every page of the review to complete the survey.

#### TO LOOK AT THE REVIEW COMMENTS AND COMPLETE THE SURVEY:

1. To look over the review, click the **Show Review Results** link within the Survey Dashboard (or from within My Surveys). This will, once more, open the survey in a new window.
2. The first page of Introductory Text will now be updated with new content. This content is, again, up to the Survey Manager to define. They should provide you with some basic instructions or expectations on how to interpret the review. If you have questions about these instructions, please contact your TRAIN administrator or the survey creator.
3. Each question has to two “modes” of view. The first mode is labeled as **My Answer**. Displayed here, are the responses YOU provided, when first taking the survey.
4. To see what comments the reviewer has added, change the view mode to **Reviewer’s Answer**. Clicking this tab will flip the contents of the screen so you can see, in read-only mode, the reviewer’s response.
5. At the end of the survey, you will be able to read the reviewer’s **Final Review**. These comments should be a summary of their thoughts and provide insight or explanation as to how they answered the questions throughout the review process.

**Note:** The summation of both your and the reviewer’s answers, comments, and final review should provide enough valuable feedback to be considered an effective “Review”. Again, the Survey Manager should provide you more specific instructions and explanation when taking the survey.

6. Once you have finished looking at every question and the Final Review, you can click **Complete Review** to finalize the review process.

**Note:** TRAIN will always keep a copy of all completed survey in your My Surveys → Completed, section.

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## Discussions and Other Resources

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In addition to learning material and course links, TRAIN provides a handful of other useful learning tools. These include everything from user participation discussion boards and various resource sets to event calendars and item “spotlights”. These sections are important to TRAIN and knowing how and when to use them can help raise the benefits of managing your learning through TRAIN.

### Discussion Boards

Discussion Boards allow users and administrators to hold discussions about relevant topics on TRAIN. The intention here is to spark conversation amongst the TRAIN community.

#### TO ACCESS AND POST TO A DISCUSSION BOARD:

1. Login to your TRAIN account and access the **Discussion Board** top level navigation tab.
2. Select the appropriate discussion topic from the list menu on the left.
3. To read replays from an existing thread, click the plus symbol (+) next to the thread. This will expand the thread and will show all replies. To read a reply, simply click on the title of that reply

**Note:** When reading a reply, you can move between replies of the same thread using the forward (>) and back (<) buttons at the top of the reply interface.

4. To leave a reply of your own, after you have selected the appropriate discussion topic from the list menu, click on the title of the thread to which you would like to reply.
5. Then, at the bottom of the thread screen, click the **Reply** button.
6. Create a **Title** for your reply or use the default title (taken from the original thread title)
7. Create the **Body** of your reply (this is the actual content of your message)
8. Click **Submit**. Your reply will now appear in the thread!

**Note:** Be sure to check the discussion boards often for new topics, threads and replies. Discussions are a great way to learn about other users, topics, courses and opportunities within TRAIN.

### Resources

The TRAIN resources section is a compilation of uploaded resource documents (PDFs, Power Point and Word files, etc) and links to online information. Often, TRAIN administrators will use the resources section to post additional course materials or expanded learning opportunity content. Similar to discussions, resources are broken into *categories*. Although the TRAIN resources are typically managed by the TRAIN

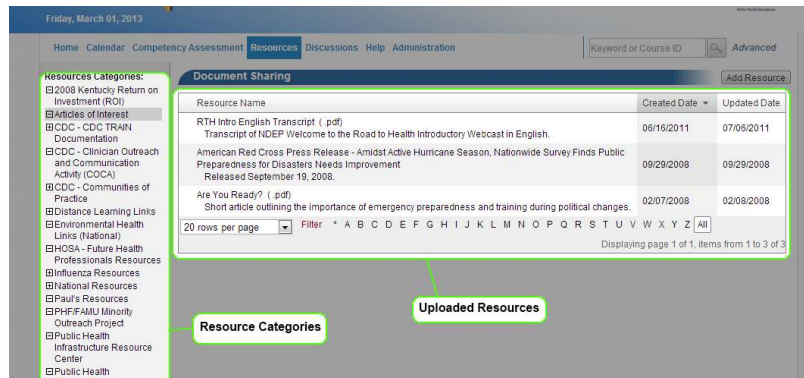


administrators, you, as an end user, do have the option to upload your own resources. However, these items will be subject to *approval* from a higher level administrator.

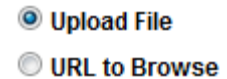
**TO ACCESS AND POST RESOURCES:**

1. Login to your TRAIN account and access the **Resources** top level navigation tab.
2. Select the appropriate resource category
3. To view a resource, click on the name of the appropriate resource

**Note:** If the resource is an online link, you will be redirected out of the TRAIN site, to the external resource. If the resource is an uploaded file, you will be prompted to download the file to your local drive.



4. As a TRAIN user, you can also add your own resources.
5. To do so, once you have selected the appropriate resource category (if you have questions about which category is best to upload your resource to, please contact your TRAIN administrator), click the **Add Resource** button in the top right of the page.
6. If the resource is an uploaded document, follow the onscreen instructions to upload your file.
7. If the resource is a web link, change the radio button below to **Browse to URL** and provide the http web address of the resource
8. Create a **Name** for your resource.
9. Create a **Description** for your resource.
10. You can also adjust the assigned document category using the **Category** dropdown menu at the top of the page.
11. Lastly, click **Save**. This will submit your resource for approval.
12. You will receive email notification about the submitted resources. You will receive further email notices if your resource is approved or declined. Once approved, your resource becomes available to other TRAIN users.



**Spotlight Links**

On the TRAIN Home page, in the dashboard, there is a section labeled My Links. The first set of links in this section is provided by the affiliate administrators. You can also add your own links to this section.

## Upcoming Events


Within TRAIN, administrators and Course Providers can setup both online and live event courses. For live event courses, because they take place at a physical location at a specific date and time, users need to be aware of the latest session schedules. Enter the **Upcoming Events** portion of the TRAIN Home page.

On the TRAIN Home page, as the first announcement shown, there is a section called **Upcoming Events**. This section will display sessions that are scheduled for the near future. It is entirely up to the Course Provider if they want to display their sessions here. If you have questions about the sessions displayed here, please contact your TRAIN administrator.

## Event Calendar

**Important:** The Event Calendar is not available to all users from all states. States must subscribe to the event calendar individually. If you are interested in bringing the Event Calendar to your state, please contact your TRAIN administrator.

Similar to Upcoming Events, the **Calendar** is a good way to get a quick overview of all publicly available upcoming sessions. This feature is available via the **Calendar** (for Kentucky users, this is called **Monthly Calendar**) link in the TRAIN navigation bar. To access course and session information within the Calendar, simply click on the asset title in the calendar display.

You can also print a list of courses for a given month. The **Print icon** () is located above both the month and date views of the Calendar. Clicking the print icon will reveal a popup window in which the user can refine their date range using the standard date selection boxes. The print friendly calendar will not display as a calendar for printing purposes; rather, it will list the events by date.



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## TRAIN Mobile

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TRAIN is available with some limited functionality through your smartphone or tablet. Go to [m.train.org](http://m.train.org) from your mobile device to login. From the mobile site, you can take and launch online courses as well as complete evaluations and assessments.

From the mobile site, you can also use the **Desktop** link to access the full site.

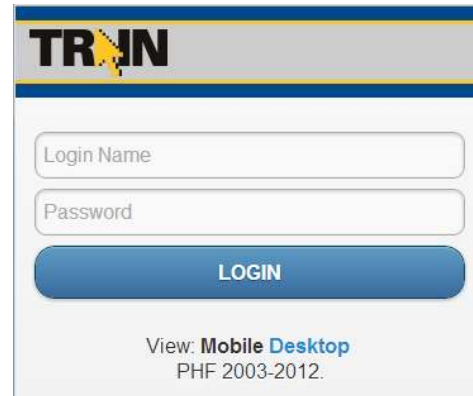
**Note:** Apple's mobile devices (iPhone and iPad), do not permit any flash content. Many TRAIN courses are only provided as Flash content. Such content will not work on Apple devices.

To access the full list of TRAIN courses that are available for your mobile device, click the **Courses** button. From there, you can search the complete laundry list of courses, you may perform a search based on the course name.

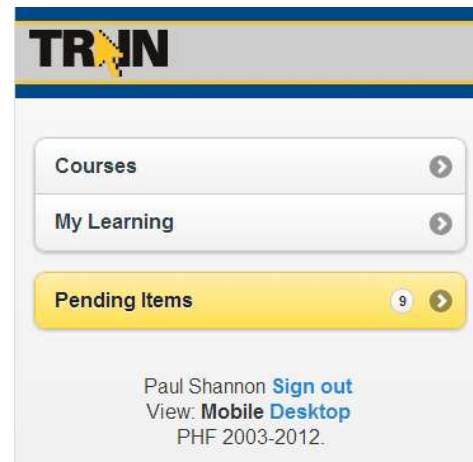
Any course you have started and/or completed will appear under the **My Learning** link. You can access details about each course by clicking on the specific courses.

The **Pending Items** button displays a number which indicates the number of assessments and evaluations which need your attention. When this button is clicked, the

**Pending Items** page will show all assessments and evaluations that are not completed for your account. You can launch the evaluations and assessments from this page.



The screenshot shows the TRAIN mobile login interface. At the top is the TRAIN logo. Below it are two input fields: "Login Name" and "Password". A blue "LOGIN" button is positioned below the password field. At the bottom of the page, there is a link to "View: Mobile Desktop" and a copyright notice "PHF 2003-2012."



The screenshot shows the TRAIN mobile dashboard. At the top is the TRAIN logo. Below it are three menu items: "Courses", "My Learning", and "Pending Items". The "Pending Items" item is highlighted in yellow and shows a notification bubble with the number "9". At the bottom of the page, there is a link to "Sign out" for Paul Shannon, a link to "View: Mobile Desktop", and a copyright notice "PHF 2003-2012."

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## Support and Troubleshooting

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If you have questions about TRAIN, please contact your TRAIN administrators.

### Contacts

To see a full list of contacts, login to your TRAIN account and access the **Help** tab. From there, click on the **Contacts** link.

### Environment Tester

If you are experiencing technical issues with TRAIN, we recommend your first try the TRAIN environment tester. This function will test your computer for TRAIN compatibility (keep in mind that 3<sup>rd</sup> party course content may have different compatibility requirements).

To access the TRAIN environment tester, you do not need to be logged in to your TRAIN account. Simply access the **Help** tab on the top level navigation and then click the **Test Your Environment** link. This will run a series of tests on your browser. Any tests that come back failed, with a red X icon, indicate areas you may need to change to be fully compatible with TRAIN. Click on the name of the failed test for additional instructions.

### Forgotten Passwords

If you forget your password, click the **Forgot Login Name/Password?** link on the TRAIN Home page and follow the onscreen instructions.

You will be asked to enter your email address and TRAIN will send an email with your login credentials. If your email address exists on more than one account in TRAIN, you will need to contact your affiliate administrator. You do not need to be opted into TRAIN emails to receive the forgotten password emails.

## Technical Requirements

- See the TRAIN online help section for the latest technical requirements.
- Some course content on TRAIN may require additional support applications (such as Flash).