Admin Guide: Training Module v1.1

The Training Module was designed to help employers track their certification requirements and the status of their employees compliance with those requirements. The tasks in this manual are completed under Settings and require Training Admin Permission. Please contact your system administrator if you need this permission.

Setup Certifications – Overview

Certification Requirements are the specific trainings that are required by the company. Examples include First Responder Training, Background Checks, HIPAA acknowledgement or Person-Centered Plans. Certification Requirements are completely customizable and can support any training that the company would like to track in DCI.

Certification Templates are a set of Certification Requirements. They allow you to group requirements together that may be required to work in a particular program or cost center, or to provide a particular service. You can also create a template of general requirements that must be completed by all employees. The employee must meet the Certification Requirements of a Certification Template in order to have an active service account for the entity that is linked to the Certification Template.

Templates can be linked to various entities including service codes, client funding accounts, program accounts, client or employee profiles, or cost centers. Employees must have all of the template's certification requirements in order to have an active service account for the linked entity.

Now that we know what Certification Requirements and Certification Templates are, let's set them up.

Create New Certification Requirement

To create Certification Requirements:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click "Settings" on the header then select "Certification Requirements" from the sidebar
3. Select "Actions" then "Add New Certification Requirement"
4. Select the profile type that this certification is required for, then add a description
5. If this requirement only needs to be completed once, select 'Yes' on the 'Non-recurring' field. If the certification needs to be renewed after a certain duration leave the 'Non-recurring' field set as 'No'.
    a. Set the valid duration months. This is the number of months that the certification is good for before it needs to be renewed.
6. Expiration Reminder Days – indicates how many days before expiration you would like reminders to be sent to the employee and/or supervisor.
7. Expiration Reminder Frequency indicates how many days you would like the reminder to be sent once reminders start. The employee and/or supervisor will be informed when it is their final reminder.
8. You can add a link to the certification training if desired. This will be visible to the employee and allow them to easily navigate to the website that the training should be completed at.
9. If there is a Grace Period, enter it in the Hire Grace Period Days field.
    a. If Grace Period is set, it will allow service accounts to be created without the certifications.

10. Once all fields have been filled in, Click 'Save' then select 'Yes' on the confirmation window.

Create Certification Template

Certification templates allow you to group requirements together that may be required to work in a particular program or cost center, or to provide a particular service. You can also create a template of general requirements that must be completed by all employees. Templates can be linked to various entities including service codes, client funding accounts, program accounts, client or employee profiles, or cost centers. Employees must have all of the template's certification requirements in order to have an active service account for the linked entity.

To create a Certification Template:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click "Settings" on the header then select "Certification Templates" from the sidebar
3. Select 'Actions' then 'Add New Certification Template'
4. Add a Template Name and description
5. Click 'Save then select 'Yes' on the confirmation window

Add Certification Requirements to Certification Templates

To add Certification Requirements to a Template:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click "Settings" on the header then select "Certification Templates" from the sidebar
3. Select the template you would like to add Certification Requirements to
4. Click 'Actions' then Add/Remove Certification Requirement
5. Use the search field or scroll through the Available table to find the requirements you want to add
6. Select the necessary requirement(s) you wish to add. (This table has the multi-select functionality enabled) Then use the right arrow to add selected certification requirement(s) or the double right arrow to add all existing certification requirements to the 'Selected' table.
7. Once you have added the desired requirements, click 'Save' then select 'Yes' on the confirmation window

The certification requirements will be listed on the table below the Template Details. You can add more requirements or remove requirements from the template by going back to the Add/Remove Certification Requirements engine through the Actions menu.

Remove Certification Requirements from Certification Templates

To remove Certification Requirements from a Template:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click "Settings" on the header then select "Certification Templates" from the sidebar
3. Select the template you would like to add Certification Requirements to
4. Click 'Actions' then Add/Remove Certification Requirement
5. In the Selected table, choose the requirement(s) you wish to remove. (This table has the multi-select functionality enabled) Then use the left arrow to remove selected certification

requirements or the double left arrow to remove all existing certification requirements from the 'Selected' table.
6. Once you have added the desired requirements, click 'Save' then select 'Yes' on the confirmation window

The certification requirements will be listed on the table below the Template Details. You can add more requirements or remove requirements from the template by going back to the Add/Remove Certification Requirements engine through the Actions menu.

Link Certification Templates

The next step is to link the Certification Template to the entities it is required for. You can link templates to Service Code, Accounts, Cost Centers, or Profiles. When linking, please try to keep the number of links as minimal as possible. The more links in the system, the more opportunities for user error.

For example, we could capture one region or cost center and link all new hire trainings and program specific training by linking to a cost center. All driver training could be linked to the employee profile.

Hierarchy of Linking (Largest to Smallest)

1. Cost Center - all employees in one cost center
2. Service Code - all employees punching against this service code, regardless of client or program
3. Mast Program Account - all employees working in this program or group service
4. Client Profile - all employees working with this client
5. Employee Profile - one employee
6. Funding Account - all employees providing a specific service to a specific client

To link the template to an object:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click "Settings" on the header then select "Certification Templates" from the sidebar
3. Select the template you would like to link
4. Click the 'Actions' menu, then select the correlated action step for the link that you are adding
   a. Add/Remove Cost Centers
   b. Add/Remove Service Code
   c. Add/Remove Accounts
   d. Add/Remove Profiles
5. Use the search field or scroll through the Available table to find the object you want to link the teamplate to
6. Select the object(s) you wish to add. (This table has the multi-select functionality enabled.) Then use the right arrow to add selected object(s) or the double right arrow to add all existing objects in the 'Selected' table.
7. Once you have added the desired objects, click 'Save' then select 'Yes' on the confirmation window
8. Repeat this process as needed to link the templates to other object types.

Manage Profile Certifications

Users with Supervisor Role or Employee Admin Permission are able to add Profile Certifications.

To add a profile Certification for an employee:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Employees’ from the sidebar
3. Select the employee you wish to add a Profile Certification to. You can use the filters to search for a desired employee
4. Click anywhere in the row to open the Employees Details Page
5. Select ‘Actions’ then ‘Add Certification’
6. Choose the Certification from the dropdown menu. You will see all certification requirements that are currently in the system.
7. Enter the date that the certification was obtained. The Expiration Date will automatically populate based on the certification requirement and the certification date.
8. Click ‘Save’ then select ‘Yes’ on the confirmation window

The certification has now been added to the employee profile and is listed in the Certifications table. You will see the certification date, the expiration date, and the date that expiration reminders will start being sent. Click anywhere in the certification row to open the Details Page.

To add a copy of the actual training certificate:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click ‘Employees’ from the sidebar
3. Select the employee you wish to add a Training Certificate to. You can use the filters to search for a desired employee
4. Click anywhere in the row to open the Employees Details Page
5. Choose ‘Certifications’ then select the certification you wish to add a Training Certificate to
6. Select ‘Actions’ then ‘Add Attachment’
    a. Attachments will be visible on the Attachments tab below the Details boxes.

You can also edit, renew, or reject the certification from the Actions menu. All changes to a certification will be tracked.

Reports

There are numerous Training Module Reports that provide a quick and easy way to view all certification requirements, templates, and associations. To view them,

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Reports” on the header then hover over “Training Reports”
3. Select the report you wish to run
4. Use the search functionality at the top of the screen to filter results by various criteria depending on what report you are viewing

Reports Available:

A. Employee Training Certification Report
B. Employee Training Certification Report
C. Service Code Certification Requirements Report
D. Service Code Certification Templates Report

E. Certification Templates Report
F. Certification Templates Association Report
G. Certification Requirements Report
H. Certification Requirements Association's Report
I. Expiring Training Certification Report

Import

These tasks can also be completed using the Import function. If a large quantity of requirements, templates, and associations need to be created, follow the instructions in the "Admin Guide - Import Module" in the Help Center.