Assessment Management
December 2022

Introduction

Purpose: This job aid describes how Administrators and Course Providers with the Assessment Manager role can create, edit, and manage assessments. It includes images to illustrate key points. Images may differ from the presentation in TRAIN.org.
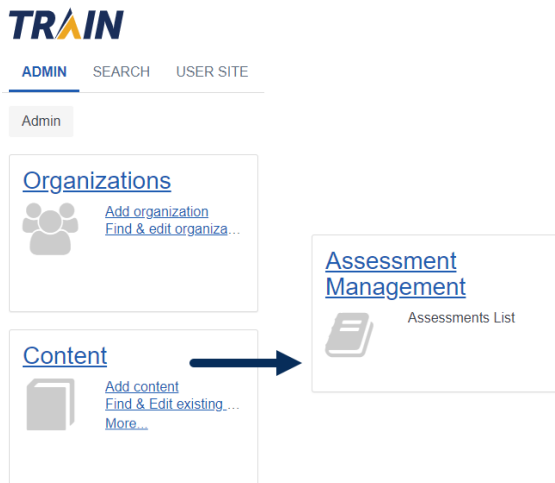
Access:

- **Course Providers** and **Assessment Managers** will be able to access the Assessment Management tools.

Related Inclusions and Enhancements:

- Course providers can choose to offer one assessment across all credit types and learner groups or offer different assessments for various credit types and learner groups.

- The checkmark for auto-verification has been removed and replaced with a new process for setting new verification options for the entire course.

Creating a New Assessment

Go to the Admin menu and select the Content tile. Within Content, click on the Assessment Management tile.

The next page will display a list of existing Assessments you can access. Click the Add Assessment button to the right of the Search field. The button will open an Assessment Settings page with a number of sections for you to consider.
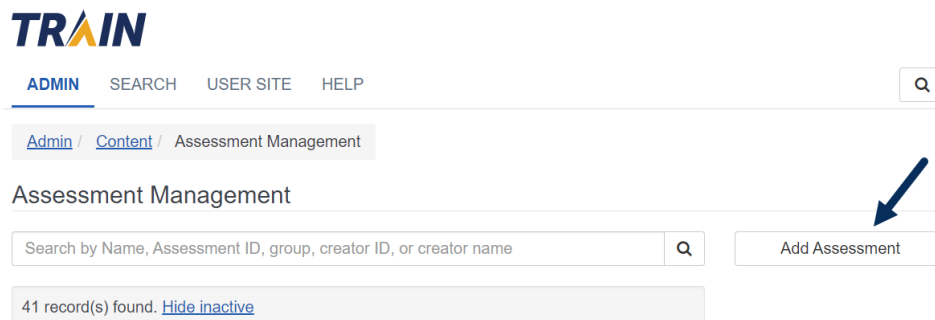
On the Assessment Settings page, enter a unique title for your assessment and make your selections in each of the page sections. A screenshot of each section follows the item descriptions. Once you have made your initial selections, click the green Save button at the top right of the page.

Grading options (required): You can choose to have TRAIN automatically grade assessments and mark the learners as passed or failed based on an achieved percentage or number of points. For example, you can choose 15 points as your passing score, and if the learner earns 15 or more points with their answers, they will pass the assessment and see a Passed status

on the course (displayed after any post-evaluation is finished). Percentage is the default grading option.

Question Delivery Type: You can choose to have all of the assessment questions presented in the exact order in which they are listed or in random order. The third option allows TRAIN to select a number of random questions out of a set that you choose, in which case each learner may encounter different questions. Defined sequence is the default option.

Time limit (optional): You can set a time limit for completing the assessment.

Attempts allowed (optional): You can restrict learners to a limited number of test attempts. If you allow more than one (1) and the learner fails the first time through, they will remain in the Post-Assessment Pending status until they pass OR exhaust all of the attempts. If the learner does not achieve a passing score and all attempts are exhausted, the registration will reflect a Failed status. The default selection is one (1) attempt. If you want to allow unlimited attempts, delete the default value from the field.

Days to complete all attempts (optional): You can give learners a restricted period of time to complete the test. This calculation begins after their first failed attempt. If they do not complete the remaining attempts within the timeframe, they will end with a Failed status.

Date range (optional): If you set a date range, the assessment will be offered only during that date range. If the assessment end date passes and the course is still active, learners will be able to complete the course without taking the assessment.

Availability: The Availability selection controls who will be able to edit the assessment and/or assign it to their courses. The Availability section will pre-populate with groups to which you belong. These can be removed as needed. Other groups can be added by clicking the Add Group button. Your Availability choice(s) should be based on the extent to which you need to

share this assessment with others. Reach out to your TRAIN administrator for further guidance if you need assistance with your selection.

Availability

+ Add Group

Administrators from these groups will be able to edit this Assessment and assign it to their courses

	Selected groups
❌	Disease Prevention and Health Promotion
❌	National
❌	South Dakota

Options: There are several items to review under the Options section. All have a default selection. If you would like to change any option, click the radio button next to the selection you would like to make. This will move the black dot from the default to your own selection.

Options

Retry behavior
- ⦿ If user quits the assessment without finishing, allow user to resume where they left off
- ○ If user quits the Assessment without finishing, start assessment from the beginning

Reviewing results
- ☑ Allow users to review completed assessment results

Correct questions
- ○ Hide information about correct questions
- ⦿ Show whether the question is answered correctly or not on any attempt
- ○ Show whether the question is answered correctly or not on the final attempt

Correct answers
- ⦿ Hide correct answers
- ○ Show correct answers on any attempt
- ○ Show correct answers only on the final attempt

Correct question feedback
- ○ Hide Correct Question Feedback
- ⦿ Show Correct Question Feedback on any attempt
- ○ Show Correct Question Feedback on only the final attempt

Incorrect question feedback
- ○ Hide Incorrect Question Feedback
- ⦿ Show Incorrect Question Feedback on any attempt
- ○ Show Incorrect Question Feedback on only the final attempt

When you have made all of your initial selections, click the green Save button. You will then move on to creating your questions.

Adding Questions to an Assessment

After you have saved your initial selections, you will see a review page. The review page offers an Edit Settings button to edit previous selections as well as a dropdown to make your

assessment active when it is complete. Scroll through the review page and you will find additional sections, or use the blue hyperlinks under the title to jump to each section.

In the Questions section, click the button labeled Add Question and begin to make your selections.

Questions (0)   →   Add Question

Passing score: 70%
Max available score: 100%

There are no questions defined for this assessment.

There are several types of questions you can choose to use. Each type will have unique requirements for setup. In this document, Multiple Choice has been selected as the example. After clicking the radio button for the selection of Multiple Choice, click the Next button at the bottom of the page.

Cancel

Add question   (Fields marked below are required)

Health Equity in Rural Communities Inactive
Percentage | Passing score: 70%

◉ Choose a question type
   ◉ Multiple Choice
   ○ True/False
   ○ Check All That Apply
   ○ Fill in the Blank
   ○ Rating (Likert scale)
   ○ Essay / Short Answer
   ○ Matching
○ Find and clone a question

                                                                      Next

On the next page, you will be prompted to enter your question text and create your possible answers. To create answers, click the Add an Answer button.

Type in your answer and click the green checkmark to save it on the page. If this answer is the correct one, be sure to click the checkbox next to the word Correct. You can then click the Add button again to create all of your potential answers.

When completed, the list of answers will display. You can drag and drop the questions into a different order by clicking and holding the 6 dots while moving your computer mouse. To edit or delete answers, use the 3-dot menu on the right.

Under the list of answers, you will find the optional Feedback section. You can use these areas to craft custom reinforcing responses that are shown to learners when they answer correctly or incorrectly. Please note that the display of the Feedback is governed by selections made in the Options section of Assessment Settings.

Feedback

Correct

| B | I | H | ≡ | ≣ | 66 | % | 🖼 | 📎 | 🔍 Preview |

Correct! Everyone can be involved in improving health equity.

🖼 Attach a file

Incorrect

| B | I | H | ≡ | ≣ | 66 | % | 🖼 | 📎 | 🔍 Preview |

The correct answer is "All of the above." Everyone can play a role in the advancement of health equity.

🖼 Attach a file

When you have completed the entries for the question, click the green Save button at the top of the page. You will see the review page again and can scroll down to the Questions section (or use the blue hyperlink) to add as many questions as you like.

You can use two options in the Questions section to move the order of questions or set up a skip pattern. Click on either toggle to enable these features.

Questions (3)   🟢 Move questions   ⭕ Edit conditions

Passing score: 70%
Max available score: 100%

Move	#	Question
⠿ ∧ ∨	1	Who should be involved in the advancement of health equity in rural communities?
		Local Health Officials
		Regional Government Officials
		School Board Members
		General Public
✔		All of the above

Skip Pattern Functionality

Skip pattern functionality only applies if the Defined Sequence question delivery is selected and there are at least three (3) questions. Skip patterns allow you to set conditions on the answers that will automatically route the learner through the assessment.

Questions (3)   ◯ Move questions   🟢 Edit conditions   [Add Question]

Passing score: 70%
Max available score: 100%

#	Question	Type	Weight	
1	Who should be involved in the advancement of health equity in rural communities?	Multiple Choice	1	⋮

Local Health Officials Set Condition

Regional Government Officials Set Condition

School Board Members Set Condition

General Public Set Condition

✔ All of the above Set Condition

Edit Condition   ✕

Question #1	Who should be involved in the advancement of health equity in rural communities?
If answer is	Local Health Officials
Then skip to	question 3 ⌄

What are some barriers to health equity?

[Cancel] [Save Condition]

Question Weight

You have the option to change the weight of one or more questions in your assessment. This works for both percentage and points-based scoring.

If all questions are kept at the default value, every question will count equally in the grade calculation. If a different weight is chosen for one or more questions, those answers will receive a larger percentage of the overall possible score. The examples below show how an assessment with four questions will differ if one question has a higher weight.

Example of Same Weight Percentage Distribution:

Question 1 with default weight 1 = 25%
Question 2 with default weight 1 = 25%
Question 3 with default weight 1 = 25%
Question 4 with default weight 1 = 25%

If the minimum passing score is 60%, the learner will need to have three correct answers in order to pass.

Example of Higher Weight Percentage Distribution:

Question 1 with default weight 1 = 20%
Question 2 with default weight 2 = 40%
Question 3 with default weight 1 = 20%
Question 4 with default weight 1 = 20%

If the minimum passing score is 60%, the learner can pass the assessment in at least two ways:

1. Correctly answer at least one question with weight 1 (20%) AND the question with weight 2 (40%)

2. Correctly answer three questions with weight 1 (20%)

Adding Custom Introductory or Final Text

TRAIN provides general default text when a learner starts and finishes an assessment. If you would like to create custom messages, use the buttons found in the Advanced Options section of Assessment Settings.
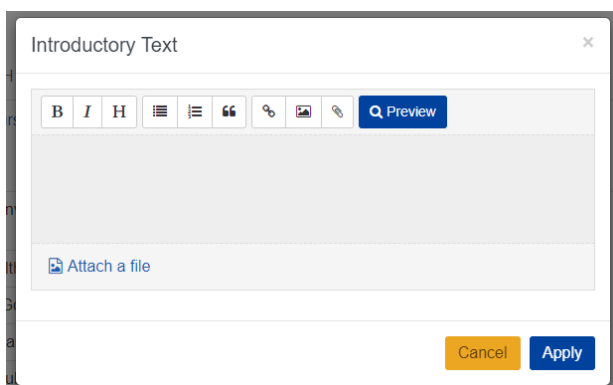
Advanced options
_____

Provide custom introductory text

Provide custom final text

When one of the buttons is clicked, a text box will display. Enter your custom message and click Apply.

Introductory Text   ×

B I H   ☰ ☷ ❝ ⬚ 🖼 ⬚   🔍 Preview

🖼 Attach a file

Cancel   Apply

Activating the Assessment

Once your assessment is fully constructed, you can use the dropdown at the top of the review page to change its status from Inactive to Active at any time. The assessment must be active in order for learners to be prompted to take it.

Health Equity in Rural Communities

1 question   0 courses   Advanced options   ● Inactive ▾

Active
Inactive

Grading Type   Percentage

Passing score   70%

Editing, Cloning, or Deleting an Existing Assessment

You can take several actions on an assessment by opening the 3-dot menu to the right of the assessment title.

Assessment Management

| global | | Q | | Add Assessment |

13 record(s) found. Hide inactive

Name	Questions	Courses	Availability	
Global Mental Health	5	1	National, National/Rhode Island	⋮
FDOH Safeguarding PII global	1	1	National/Florida	
(GH002) Global Health Intro - NDPHTN	5	3	National, National/North Da	
(GH003) Determinants of Global Health - NDPHTN	5	2	National	
(GH008) Malaria and Global Health - NDPHTN	5	2	National, National/North Da	

✏ Edit
👁 Preview
▢ Clone
☑ Deactivate
🗑 Delete

Adding the Assessment to a Course through Assessment Management

You can assign the assessment to a course while you are in the assessment itself. To do this, scroll down the review page to the Courses section. Click the Assign to Course button.

Courses (0)   Assign to Course

Not tied to any course

On the next page, click the Select Course button.

Cancel   Save

Assign to course

Health Equity in Rural Communities Inactive

Course   Assigned to 0 courses.   Select Course

Back   Next

To search for a course, enter the search criteria and click the magnifying glass icon. Select the appropriate course from the results list and click the Add button.

You will see the course associated to the assessment. If you made an incorrect selection, you can remove it by clicking the red box and searching again. To continue with the setup, click the Next button.

You must identify the assessment as a pre-content or post-content test. The default selection is Post-assessment. There are additional options to consider in each case. When your selections are made, click the Next button.

The next selection is the availability of the assessment for specific learner groups. This allows you to offer different assessments for different groups taking the same course (depending on other course settings). Reach out to your TRAIN administrator for further guidance if you need assistance. When finished, click the Next button.

The final page provides a review of your course assignment selections. You can use the Change link on this or any previous page to make changes. When all selections are finalized, click the green Save button followed by the orange Cancel button to exit the Assessment area.
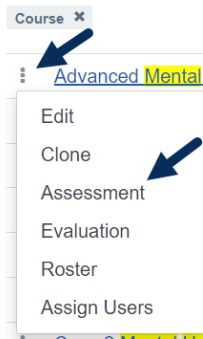

Adding the Assessment through the Quick Link in Course Search

You can also associate assessments to courses through the Course Content area of TRAIN. This section goes through the process of adding an assessment through the Assessment Quick Link under the 3-dot menu for the course.

You will start on a page that will show you any previously assigned assessments. In this example, there are no existing assessments on the course. Click the Assign Assessment link to begin.

Search for the assessment you want to associate to the course. Click on the appropriate title on the results list to continue with the process.

You will see your selection on the next page. Click the Next button to continue.

Cancel   Save

Assign Assessment

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Assessment   ❌ Global Mental Health

Back   ⟶   Next

In this example, the course offers various credit types. You can choose to offer a unique assessment per credit type (depending on other course settings). None is selected by default. If applicable, choose the credit type(s) and click the Next button.

Cancel   Save

Assign Assessment

Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Assessment   Global Mental Health   Change

Credits   Select all   Unselect all
                  ☐ AAFP
                  ☐ AAA: CEUs
                  ☑ None

Back   ⟶   Next

Make your selection for Assessment type (pre-content or post-content) and click the Next button.

Cancel   Save

Assign Assessment

## Advanced Mental Health Toolkit for Public Health Practitioners
Webcast (recorded)

Assessment   Global Mental Health   Change

Credits   None   Change

Type   ○ Pre-Assessment
                     ☐ Test-out (Complete the course immediately if pre-assessment is passed)
                  ◉ Post-assessment
                     ☐ Open book (Allows launching online course until post-assessment is completed)

Back   ⟶   Next

Choose the group(s) whose learners should be prompted to take the assessment and click the Next button.

Lastly, review your selections, change as needed, and click the Save button when finished.

Adding the Assessment to a Course through Course Edit

You can also add assessments through Course Edit.
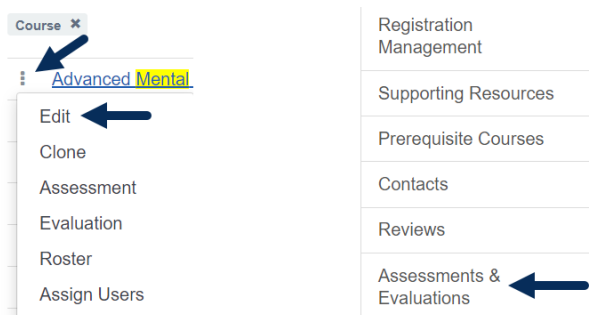
In this workflow, your first choice is related to how many assessments you need to offer for the course. The first option is to have one (1) assessment (and/or evaluation) that will be used for all credit types and all learners. This is the default selection for new courses created after December 1, 2022.

With the second option, you can offer different assessments (and/or evaluations) for varying credit types and/or learner groups.

Make your selection and then click on the Assessments button. From this point on, the process is the same as adding an assessment through the Assessment quick link in Course Search.

Relationship of Assessments to Multiple Credit Type Selection by Learners

After December 18, 2022, course providers can choose to allow learners to earn multiple credit types when they take a course. If this option is chosen, TRAIN limits assessments and evaluations to one (1) per course so that learners are tested once and not multiple times.

When you make your choice to allow one or more credit types to be earned, it has a direct relationship to the Assessments and Evaluations settings, and vice versa.

Single Assessment / Evaluation = Learners can select more than one credit type to earn

Multiple Assessment / Evaluation = Learners are restricted to one credit type selection

Settings for Single Credit Type Selection = Multiple Assessment and/or Evaluation

Accreditations & Credit

- Certificates
- Visibility Options
- Competencies & Capabilities
- Registration Management
- Supporting Resources
- Prerequisite Courses
- Contacts

Credit(s)

◉ Learners can select only one credit type
  Allow separate Assessments and Evaluations to be assigned to each credit type
○ Allow learners to select multiple credit types
  Only one Assessment and Evaluation can be assigned to the course

✏️	1 AAA: CEUs	❌
✏️	1.25 AAFP	❌
✏️	1 ACPE-Technician: Contact Hours/Continuing Pharmacy Education (CPE) Credits	❌

+ Add Credit

- Common Information
- Availability
- Description
- Organization & Sponsor
- Content
- Completion & Verification

Assessments & Evaluations

○ **Single Assessment / Evaluation**
  Allow users to select more than one credit type

◉ **Multiple Assessment / Evaluation**
  Restrict users to a single credit type. This mode permits different assessments / evaluations per credit type.

[Assessments]

[Evaluations]

Settings for Multiple Credit Type Selection = Single Assessment and/or Evaluation

Accreditations & Credit

- Certificates
- Visibility Options
- Competencies & Capabilities
- Registration Management
- Supporting Resources
- Prerequisite Courses
- Contacts

Credit(s)

○ Learners can select only one credit type
  Allow separate Assessments and Evaluations to be assigned to each credit type
◉ Allow learners to select multiple credit types
  Only one Assessment and Evaluation can be assigned to the course

✏️	1 AAA: CEUs	❌
✏️	1.25 AAFP	❌
✏️	1 ACPE-Technician: Contact Hours/Continuing Pharmacy Education (CPE) Credits	❌

+ Add Credit

Common Information
Availability
Description
Organization & Sponsor
Content
Completion & Verification

Assessments & Evaluations

◉ Single Assessment / Evaluation
  Allow users to select more than one credit type

○ Multiple Assessment / Evaluation
  Restrict users to a single credit type. This mode permits different assessments / evaluations per credit type.

Assessments

Evaluations

If your choices in the Accreditations & Credit section and the Assessments & Evaluations section contradict one another, a message will display and provide guidance on what needs to be considered or changed.

Important note: If you have already assigned multiple assessments (and/or evaluations) to the course and then decide to allow learners to select more than one credit type when they register, the assessments (and/or evaluations) will be removed since TRAIN cannot detect which of them you may want to retain. You will see a prompt to confirm that you want to make this change. Afterward, you can associate the appropriate assessment (and/or evaluation). Existing registrations will not be affected.

Change to Single Assessment / Evaluation?

By making this change all Assessments / Evaluations currently assigned to this course will be removed.

Existing registrations will not be affected.

Cancel   Change

Changes to Course Completion and Verification Options

After December 18, 2022, course providers will have one location in which to set the Course Completion and Verification options for their courses. Previously, there were four locations that offered verification settings (including Assessment Management), and these often led to confusion and contradiction. The auto-verify option in Assessment Management has been removed. The screenshots below illustrate the default options available for current course types. Existing courses have been converted to maintain their original settings.

| Title | December 18 Blended Learning Series |

Completion Options

◉ **Automatic**

The registration moves to the next step when all components are completed

○ **Manual**

The registration will stay In Progress until learner completes it manually

Verification Options

◉ **Automatic**

The BLS registration will be automatically marked "Verified" only if all required components are Verified. If there is at least one required component that is not Verified, the BLS registration will not be automatically marked "Verified" upon completion

○ **Manual**

An administrator must verify the registration through the Roster

Sidebar navigation:
- Common Information
- Availability
- Description
- Organization & Sponsor
- Content
- **Completion & Verification**
- Thumbnail
- Learning Objectives

Note: Blended Learning Series verification is dependent on the settings of its included courses

| Title | December 18 New External Content Course |

Completion Options

○ **Automatic**

Registration move to the next step upon launch

◉ **Manual**

Registration will stay In Progress until learner completes it manually

Verification Options

◉ **Automatic**

Registration is automatically marked Verified upon completion

○ **Manual**

An administrator must verify the learner's completion through the Roster

Sidebar navigation:
- Common Information
- Availability
- Description
- Organization & Sponsor
- Content
- **Completion & Verification**
- Thumbnail

| Title | December 18 Live Event (In Person) (same as Live Event (Online) & Zoom Meeting) |

- Common Information
- Availability
- Description
- Organization & Sponsor
- Sessions
- **Completion & Verification**
- Thumbnail

Completion Options

○ **Automatic**
The registration moves to the next step after the Session ends

◉ **Manual**
The registration will stay In Progress until learner completes it manually

Verification Options

◉ **Automatic**
Registration is automatically marked Verified upon completion

○ **Manual**
An administrator must verify the registration through the Roster

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| Title | December 18 Exercise (same as SCORM Course) |

- Common Information
- Availability
- Description
- Organization & Sponsor
- Sessions
- **Completion & Verification**

Completion Options

◉ **Automatic**
This course type completes automatically

○ **Manual**

Verification Options

◉ **Automatic**
Registration is automatically marked Verified upon completion

○ **Manual**
An administrator must verify the learner's completion through the Roster

Note: Exercise and SCORM courses will continue to automatically complete