Training Plan Management

Purpose: Learn how to build, edit, and manage training plans

- **What is a Training Plan?**

  A collection of courses in TRAIN compiled to address specific gaps in knowledge, skills, and competence

- **Training Plan Reporting**

  View our How to Create Training Plan Reports user guide for additional information

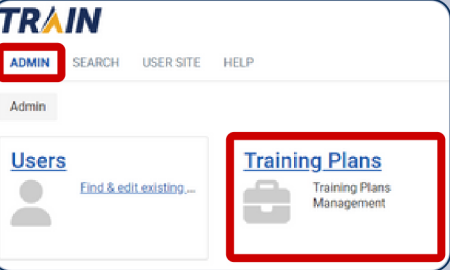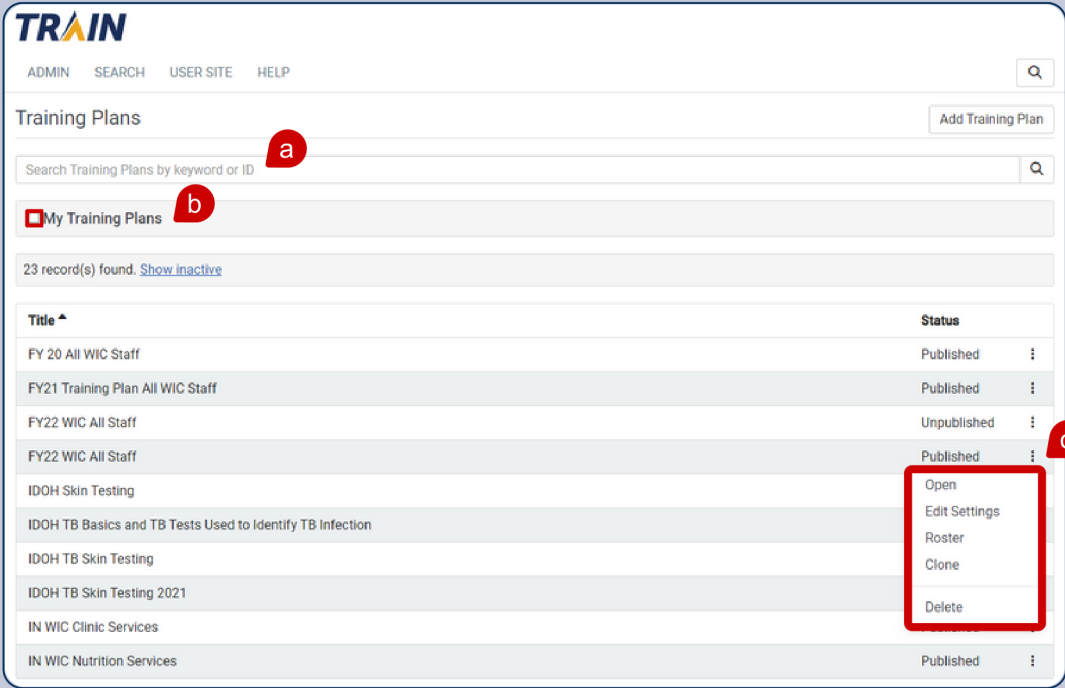**Administrative Role(s) with Access:**

- **Training Plan Manager**

Table of Contents:

TRAIN
From the **Public Health Foundation**

1 Navigate to Training Plans

Go to the **Admin** menu. Then, click on the **Training Plans** tile. This will take you to a page listing the training plans available to you, including their title and status.

To search for a training plan, type keywords or the training plan ID into the **(a)** text field.

To limit your results to training plans you created, check the **(b) My Training Plans** box.

Click the **(c)** three-dot action menu to view a drop-down menu with the options to Open, Edit, Clone, or Delete the training plan. You can also Edit Settings and View the training plan roster.

2 Create a New Training Plan

Click the **Add Training Plan** button to the right of the search bar to create a new training plan.
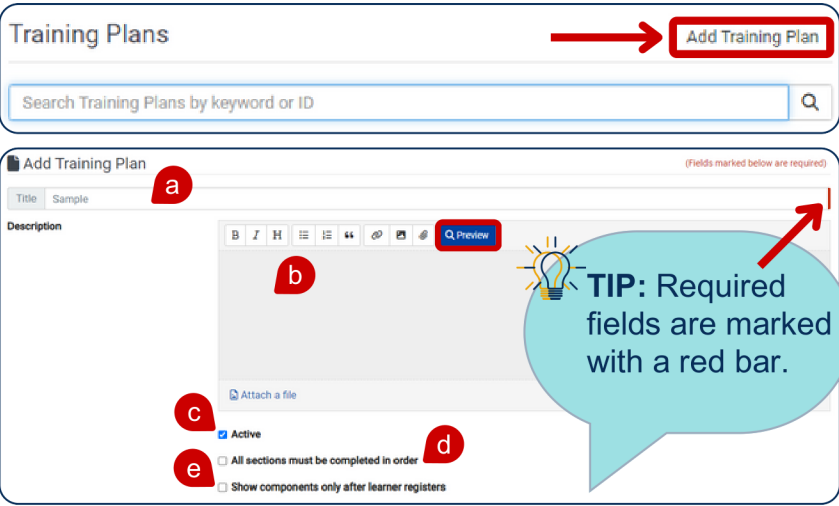
Next, create the initial settings for your plan:

(a) Title: Type the name you want to give your training plan here.

(b) Description: Type an overview that includes important details you think learners should know about your training plan. Click the **Preview** button to see how the description will look when published.

(d) Section order: When this box is checked, learners will be required to complete the training plan's courses in the order they are displayed.

(e) Components: When this box is checked, only learners registered for the training plan will see its courses.

(c) Active: When this box is checked, learners can search for the training plan and it can appear in the learner's record. When this box is unchecked, the training plan will be hidden from learners and will not appear in the learner's record.

2 Create a New Training Plan (continued)

Continue creating the initial settings for your plan:

(f) Notification: If you want to notify learners that their target completion date is approaching, type the number of days prior to the completion date you want them to receive a reminder. This automatic reminder will be sent to the learner and the Training Plan Manager.

(g) Proof of Completion: When enabled, learners can download a mini transcript of the courses they completed in the training plan. Check the box to enable this feature. See **Step 9** for more details.

Notification f

Number of days prior to the Target Date to send a notification to learners and Training Plan Manager

Proof of completion g

☐ Provides proof of completion

Logo image
The following list of file extensions are allowed: .jpg, .jpeg, .png
Image cannot exceed 512KB

📄 Drop image here or *click* to upload

Availability h Add

Indiana ✕

Cancel | Save i

📄 Add Training Plan | (Fields marked below are required)

Title | Sample

(h) Availability: Click the blue **Add** button to select which groups of learners can access the training plan.

(i) Save: Click the green **Save** button on the top right of the screen to save your training plan.

3 Add and Edit Sections

Once you have saved the initial settings for your plan, you will be directed to an overview page featuring your plan's settings. You can also access this page by clicking your plan's title on the Training Plan homepage, shown in Step 1.

< Back

Sample   Edit Settings

0 courses | 🔴 Unpublished ▼

This training plan is about mental health.

All sections must be completed in order	False
Show components only after learner registers	False
Active	True
Notification	None
Provides proof of completion	False
Availability	National/Indiana

Training Plan Usage

Usage across all of TRAIN	Learners registered: 0 / Completed registrations: 0
Manageable under your permissions	Learners registered: 0 / Completed registrations: 0

Content   c Add Section ⋮

Training Plan Content a   b Add courses ⋮
(All courses are required to complete, random order)

Title	Format
There are no courses	

(a) Every training plan must have at least one section. View the default section titled **Training Plan Content** here.

(b) Click the three-dot action menu to edit the default section title, or to delete the section after creating a new one.

(c) Click the **Add Section** button to add a new section to your training plan.

3

TRAIN
From the Public Health Foundation

3 Add and Edit Sections (continued)

Provide the details for your new section.

(d) Give your new section a title here.

(e) Select your completion requirements here. There are currently four options for completion requirements, listed below:

> Learner is required to take all courses included in this section.

> **Learner is required to take some courses included in this section:** if you select this option, enter a value in the **(f)** number of required courses field. Learners can choose which courses they take.

> **Learner is required to take "checked" courses only:** if you select this option, the list of courses in this section will include a **(g)** column for checkboxes.

> **Required courses must be taken in the order defined in this section:** select **(h)** this option if your section's courses must be taken in a specific order. Be sure the courses are listed in the correct order.

Click the blue **(i) Save** button to save your new training plan section.

To change the order sections are listed, click the **(j)** three-dot action menu and select **Move up** or **Move down**.

4 Add and Edit Courses

To add a course to a section, click the **Add courses** button to the right of the section title.

(a) Search for existing courses by typing a course title, keywords, or course ID number into the search bar.

(b) Click the magnifying glass or press enter on your keyboard to complete a search. Search results will include courses within your organization and any courses available at the National level.

TRAIN
From the Public Health Foundation

4 Add and Edit Courses (continued)

(c) Check the box next to the title of the course that you want to add to your training plan.

(d) Click the blue **Add courses** button to add the selected courses to your training plan.

(e) Added courses will appear in the section view.

(f) Click the three-dot action menu to view your options for managing a course in the section: Move up, Move down, Move to section, or Delete.

(g) If you want to move your course more than one line at a time, hover your computer mouse over this icon and drag your course where you want it to go.

(h) If you select the Move to section option from the action menu, a pop-up will appear. The current section is highlighted in blue. Select the new section and click the green **Move** button.

5 View and Edit Training Plan Details

To view settings and content on a training plan, click the three-dot action menu to the right of the published status on the list of training plans. Then, select the **Open** option.

View and Edit Training Plan Details (continued)

5

This will open an overview of your training plan details, including **(a)** the number of courses, **(b)** training plan usage statistics, and **(c)** training plan content.

➤➤ Information on when the Training Plan was created and last updated is located on the bottom of the page.

Created by	Role #31 Admin (Dec 6, 2023)
Updated by	Role #31 Admin (Dec 6, 2023)

➤➤ To update your training plan settings, click the **(d) Edit Settings** button in the upper right hand corner of the page.

Click the green **Save** button once you're finished.

Save

Export Content

6

To export a complete list of the training plan course content, click the three-dot action menu located to the right of the "Add Section" button. Then, select the **Export Content** option.

TIP: Lists will download as a .xlsx spreadsheet.

Manage Learners in Training Plans

7

To access a list of learners registered for a training plan, select the **Roster** option in the three-dot action menu located in the training plans list or on the training plan details page.

TRAIN
From the Public Health Foundation

Manage Learners in Training Plans (continued)

7

The roster page shows you learners' **(a)** name, **(b)** completion status, **(c)** the date they registered for the plan, and **(d)** their target date for completion if they were assigned the plan.

>> To export a .xlxs file of the training plan roster, click the **(e) Tools** button and then the **(f) Export** option from the dropdown menu.

>> Click the **(g)** three-dot action menu to view individual learner details, set a new target date, or remove the learner from the training plan.

Details - This option will display learner details as they relate to the training plan, including registration, assigned date, target date, completion status, and more.

Set Target Date - This option refers to the date by which you expect the learner(s) to complete the training plan.

Remove - Selecting this option will remove the learner(s) from the training plan.

Send Email To Selected Users - This option allows you to send messages to users who opted to receive emails from TRAIN.

>> To take an action for more than one learner at the same time, check the **(h)** box left of their name and click the **(i) Actions** button. Then, select an action from the drop-down menu. This action will apply to all checked learners.

Assign Learners to a Training Plan

8

On the roster page, click the **Assign Users** button located in the top right.

TRAIN
From the Public Health Foundation

Assign Learners to a Training Plan (continued)

8

On the Assign Users page, you can apply certain training plan settings to a batch of selected learners.

(a) You can search for users by typing their name, login name, email address, or TRAIN user ID number here. Click the magnifying glass to view search results.

(b) To filter your search for users by a specific group, click the **Filter By Group** button.

(c) You can also search for users by typing their name, login name, email address, or TRAIN User ID number here. Separate User ID numbers by carriage returns, spaces, or commas.

(d) Use the Target Date option to add an expected completion date for learner(s). This will be visible to learners in the Your Training Plans tab of Your Learning.

(e) Select whether you would like to send an email notifying the learner(s) that they have been assigned to the training plan here.

(f) Click the green **Assign Users** button to submit the assignment for processing.

(g) Click the blue **Assign Users** button in the confirmation window to finish assigning the training plan to your selected learners.

(h) This confirmation message will appear after you have successfully assigned learners to the training plan.

9 Proof of Completion

To enable Proof of Completion, check the **(a)** box on the Edit Settings Page.

Proof of completion

(a) ☐ **Provides proof of completion**

Logo image   The following list of file extensions are allowed: .jpg, .jpeg, .png
Image cannot exceed 512KB

(b) 📷 **Drop image here or** *click* **to upload**

(b) Drag an image or click here to upload a custom logo for the Proof of Completion documentation.

(c) To download a sample of the Proof of Completion document, click on the three-dot action menu on the Training Plan menu. Then, select the **Preview Proof of Completion** option. The default sample will include the TRAIN logo and the learner's name, courses, and completion dates.

Training Plans

| Search Training Plans by keyword or ID | 🔍 | Add Training Plan |

☐ My Training Plans

3,213 record(s) found. Show inactive

Title ▲	Status
2021 PHAP Core Curriculum	Published ⋮
Host Site Supervisor Trainings	
KDHE: Ryan White Medical Case Manager – Training Plan	
LCDHD 2021 Clinic QA - Lab Tech	
LCDHD 2022 Clinic QA - APRN	
LCDHD 2022 Clinic QA - Nutritionist & LPN	
LCDHD 2022 Diabetes Educators/365 Techs	Published ⋮

(c) menu:
Open
Edit Settings
Roster
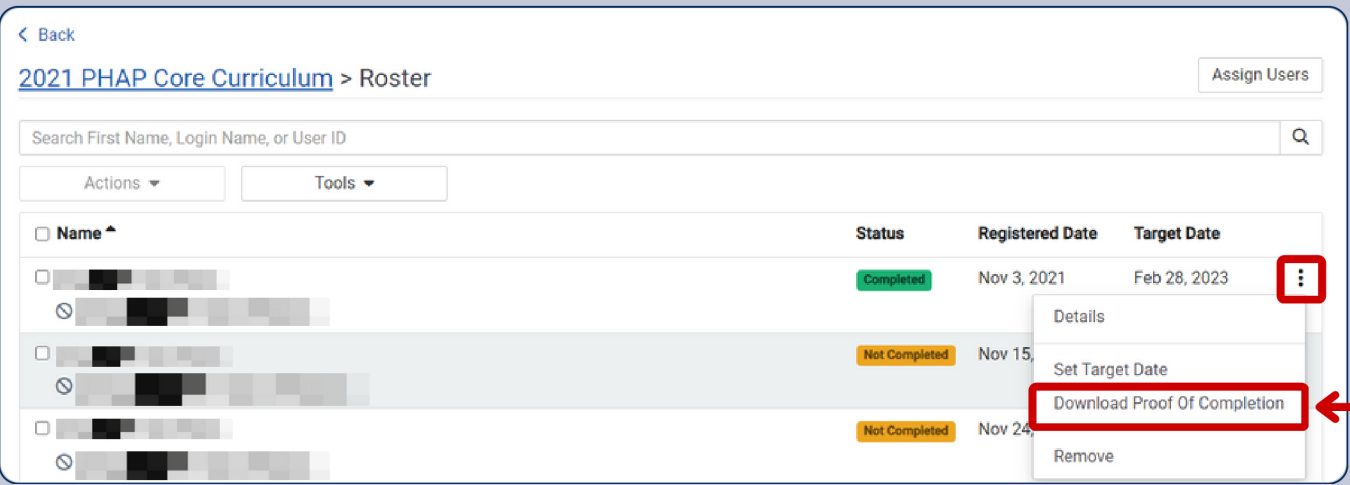Clone
→ Preview Proof Of Completion
Delete

? Proof of Completion

This is an optional setting. If you enable this part of a training plan, learners can download a mini transcript of all the courses they completed in the plan.

Proof of Completion is only available when learners have achieved a **Completed** status.

Training plan completion is calculated through a completion of **required** courses only.

If a learner completes optional courses, they will also be included in the Proof of Completion document.

» Learners who have completed a training plan that offers Proof of Completion can click the Download link located to the right of the training plan under the Your Training Plans tab of Your Learning.

| HOME | COURSE CATALOG | YOUR LEARNING | CALENDAR | RESOURCES | DISCUSSIONS | 🔍 |
| ADMIN | HELP |

This page contains relevant information about your coursework on the TRAIN Learning Network site. Check your current status within courses and training plans, print certificates, or access your transcript.

| Your Current Courses | Your Training Plans | Your Certificates | Your Transcript |

Title	Status	Target Date	Proof Of Completion
Integrating Racial Equity into Practice Learning Bundle	Not Completed	-	-
Social Determinants of Health (SDOH) Training Plan	Completed	-	Download

TRAIN
From the Public Health Foundation

Proof of Completion (continued)

9

>> Administrators can download a copy of the Proof of Completion document from the learner's three-dot action menu on the training plan roster page. By selecting the **Download Proof of Completion** option from the dropdown menu, a copy will automatically download as a .pdf file.

Clone a Training Plan

10

To clone a training plan, select the **Clone** option in the three-dot action menu located in the training plans list or on the training plan details page.
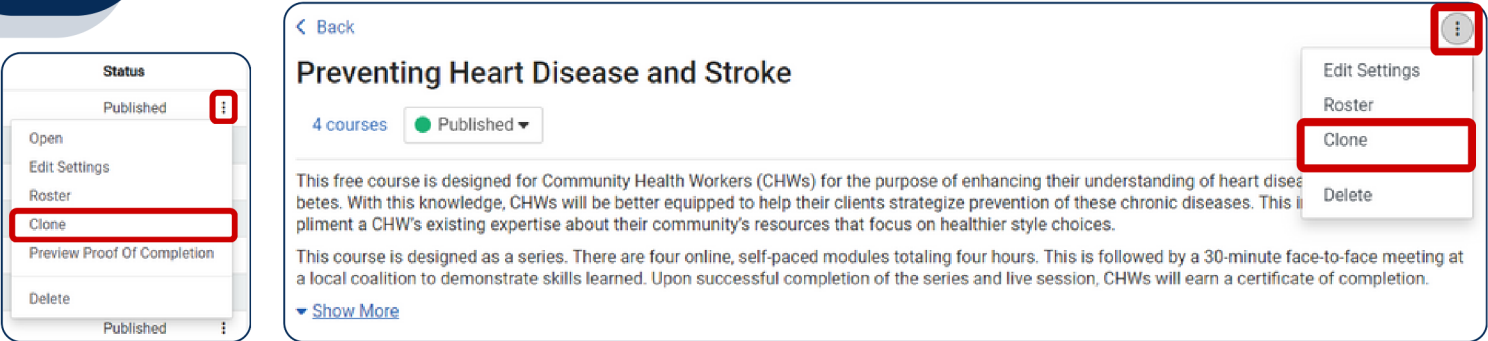
Why Clone a Course?

Cloning a course can be a helpful shortcut if you need to keep most of the plan's details the same.

For example, if you need to add or remove a few courses for specific learners in a particular group, you can clone an existing plan and avoid building a new one from scratch.

>> Edit the cloned training plan as needed. Remember to change the **(a)** name of the plan before clicking the **(b) Save** button.

>> Consult Steps 3-5 for guidance on editing training plans.

TRAIN
From the Public Health Foundation