E-Track

19x August 2019

Quick-start Guide

for County Liaisons

PLEASE NOTE: This pamphlet is intended as a quick-start resource for County Liaisons. For more detailed instructions, please refer to the COUNTY TRAINING LIAISONS section of the E-Track Help Center: http://e-track.knowledgeowl.com/help.

LOG INTO E-TRACK AS A LIAISON

Log into the EVERYONE side of E-Track: https://e-track.teds.com/EveryOne/TEDSEveryOne.jsp
Change your login mode to Manage Trainees:

MANAGE PERSON RECORDS

PERSON SEARCH

Search for an individual by name:

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Activities tab.
2. Type the individual's Last Name and First Name into the appropriate fields.
3. Click on the arrow icon.

Search for all individuals for whom you have "Manage Trainees" privileges:

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Activities tab.
2. Click on the arrow icon.

Search for a supervisor's "Direct Reports":

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Activities tab.
2. Click on Advanced Search.
3. Click on the Supervisor magnifying glass icon.
4. Type the supervisor's Last Name and First Name into the appropriate fields.
5. Click on Show Persons Matching These Values.
6. Click on the supervisor's underlined name to select.
7. Click on Search.

Search for all individuals in a specific hierarchy (and with a specific person type):

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Activities tab.
2. Click on Advanced Search.
3. Click on the Hierarchy Level magnifying glass icon.
4. Click on yellow folder icons until the desired hierarchy is revealed.
5. Click on the desired blue, underlined hierarchy to select.
6. **Other Levels** – Click in the field and select desired level – This will usually be "At and all levels below this level".
7. You may also elect to see only one person type within the selected hierarchy, such as OAC Caseworkers. To do so, place an X in the appropriate Person Type box.
8. Click on Search.

Helpful Hints:

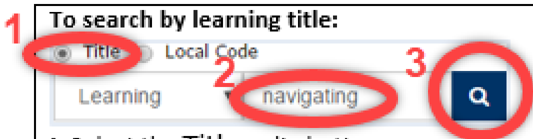
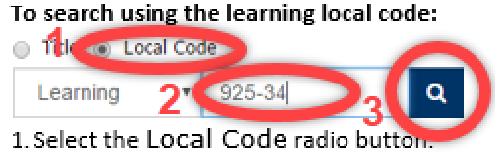
- **To print Person Search results, click on the printer icon in the upper right corner of the screen and follow printer prompts.**
- **If your search produces more than one page of results, you must print each page separately.**
- **If no person record exists for an individual, use the E-Track Add/Edit Person online form to request creation of a new person record.**

SESSION SEARCHES

- ❖ Basic Learning Search – Use a Basic Learning Search when you already know at least part of the title or learning code. (Searching by the learning code is more reliable than using the learning title.)
- ❖ Advanced Learning Search – Use an Advanced Learning Search to search for sessions by title, code, date range, county, region, or classification (caseworkers, foster caregivers/adoptive parents, or supervisors/managers, and topic/subtopic).
- ❖ Competency Catalog Search – Use a Competency Catalog Search to find sessions that address a specific competency that has been identified on a worker's ITNA as a training need.

Basic Learning Search

From your Dashboard, after switching your login mode to Manage Trainees:

To search by learning title:	To search using the learning local code:
	
1. Select the Title radio button. 2. In the Search... field, type all or part of the learning title. (For best results, use only one or two significant words in the title.) 3. Click 🔍.	1. Select the Local Code radio button. 2. In the Search... field, type the learning local code. 3. Click 🔍.

Matching learnings will be listed in your search results:

4. Click on the Sessions button to navigate directly to the **Enroll in a learning** screen.

OR

4. Click on the Underlined Learning Title to navigate to the **Learning Details** screen.
5. From the left-side menu of the **Learning Details** screen, click on Enroll or View available dates for this Learning to navigate to the **Enroll in a learning** screen.

Advanced Learning Search

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Advanced Search to reveal the advanced search options.

   All fields are optional, so input search criteria that best meets your need:

   Class Start Date Between - Find sessions within a specific date range:
   - o Type or use the calendar icons to assign the dates between which you wish to search.

   Geographic County - Locate sessions being held within a specific county:
   - o Click on the down arrow and select the county in which you would like to attend training.

   Regional Training Center - Find sessions being held in a particular region:
   - o Click on the magnifying glass icon.
   - o Click on the yellow OCWTP folder icon. (You *must* click on the *folder icon*.)
   - o Click on the yellow Regional Training Centers folder icon.
   - o Click on the desired Regional Training Center/Region to select.

   Classification - Locate sessions that address specific topics/areas of need.
   - o Click on the magnifying glass icon.
   - o Click on the appropriate yellow folder icon(s) to reveal more specific topics/classifications.
   - o Once you have located the desired topic, click on the Underlined Classification Title.
2. Search.
3. Click on the green Sessions button to navigate directly to the **Enroll in a learning** screen.

OR

3. Click on the Underlined Learning Title to navigate to the **Learning Details** screen.
4. From the left-side menu of the **Learning Details** screen, click on Enroll or View available dates for this Learning to navigate to the **Enroll in a learning** screen.

NOTE: If Enroll or View available dates for this Learning is not an option, you may opt to click on No classes are currently available for this Learning. Submit a request for this class from the left-side menu to request a new session be scheduled in your region. (See **Requesting a New Session** instructions on page 3.)

COMPETENCY CATALOG SEARCH

From your **Dashboard**, after switching your login mode to Manage Trainees:

1. Click on the **Catalogs** tab.
2. Click on **Competency Catalog** .
3. Locate your topic of interest:
   - o 111-327 – Caseworker topics
   - o 511-552 – Supervisor topics
   - o 901-995 – Foster Caregiver and Adoptive Parent topics
4. Click on the plus sign icon (far left) to expand to skill sets.
5. Locate your desired skill set and click on the plus sign icon (far left) to display competencies.
6. Click on the Underlined Competency Title to select.

   On the resulting screen under **Suggestions**, a list of learnings that address the specified competency will be displayed.

7. Click on the Underlined Learning Title to navigate to the **Learning Details** screen.
8. From the left-side menu of the **Learning Details** screen, click on the Enroll or View available dates for this Learning to navigate to the **Enroll in a learning** screen.

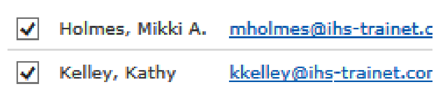
NOTE: If Enroll or View available dates for this Learning is not an option, you may opt to click on No classes are currently available for this Learning. Submit a request for this class from the left-side menu to request a new session be scheduled in your region. (See **REQUESTING A NEW SESSION** instructions below.)

REQUEST A NEW SESSION

If no sessions are scheduled, or if none of the currently-scheduled sessions are accessible to your trainee(s), you can request that a new session be scheduled:

From the **Enroll in a learning** screen:

1. Click on **Request a New Session**.
2. Use the Last Name and First Name fields to perform an individual person search ***OR*** click on the arrow icon for a list of everyone for whom you have liaison privileges.
3. Click in the box to the left of each person you wish to receive notification when a new session has been scheduled. (You may select more than one person.)



4. In the left-side menu, click Place on Request List.
5. On the resulting screen, notice the name of the individual for whom you are requesting the session (upper left, after *Adding:*).
   - o Type or use the calendar icon to assign the Date by which the class is needed.
   - o Click in the "Geographic County, if needed" field to select your preferred location.
   - o If submitting this information only for the individual noted, click on **Submit Request** .
6. If you wish to submit the same date and location for all selected individuals, click **Submit Request for all** .
7. Click on **OK**.

MANAGE SESSIONS

VIEW SESSION ROSTER (from the **Learning Details** screen)

Once you have located a session by performing one of the search functions:

1. Click on the Sessions button to advance to the **Enroll in a learning** screen.
2. Locate the desired session and, in the **Type** column, click on the multi-colored icon.
3. To view the session roster, in the left-side menu, click on View the list of class attendees.
   - o You may print the list of class attendees by clicking on the printer icon.
4. In the upper right corner, click the back arrow to return to the class information page and resume the enrollment process.

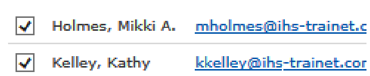
ENROLLING INDIVIDUALS IN A SESSION

TIPS:

- ❖ From the **Enroll in a Learning** screen, you can click on the radio buttons to toggle between **Matching Sessions** (the list of sessions that are currently scheduled that match your search criteria) and **All Available Sessions** (***all*** currently-scheduled sessions, including sessions that may be outside the date range and location you assigned as search criteria).
- ❖ Clicking on the colored icon in the **Type** column provides additional information about the session, including the facility address and the instructor. If at this point you wish to enroll an individual, click on Enroll in this class to proceed to the **Enroll in a learning** screen.

Once you have located a session by performing one of the search functions:

1. Click on the button Sessions to advance to the **Enroll in a learning** screen.
2. Locate the desired session and click on the [Enroll] button. ***Be careful to pay close attention to the date(s), time(s), and location to be sure you enroll your trainees in the correct session.***
3. Use the Last Name and First Name fields to perform an individual person search ***OR*** click on the arrow for a list of everyone for whom you have liaison privileges.
4. Click in the box to the left of each person's name to select. (You may select more than one person.)



5. In the left-side menu, click Enroll.
6. Click OK.

SPECIAL NOTE REGARDING REGISTRATION AND WITHDRAWAL:

If you receive the message: ***"Because all enrollments into this class must be approved by a class registrar, you will have to contact a registrar to enroll you,"*** click on the Show List of Registrars button, scroll down to the **Registrars** list, and call or email a session registrar to complete the enrollment/withdrawal process. If no registrar is identified, contact the host RTC.

WITHDRAWING INDIVIDUALS FROM A SESSION

From your **Dashboard**, after switching your login mode to Manage Trainees:

1. Click on the **Activities** tab.
2. Use the Last Name and First Name fields to perform an individual person search ***OR*** click on ➔ for a list of everyone for whom you have liaison privileges.
3. Click on the person's underlined name.
4. Click on the Underlined Session Title from which you want to withdraw the person. (The person must have the status of Enrolled.)
5. From the left-side menu of the **Session Details** screen, click on Withdraw from this class.
6. To finalize the withdrawal process, from the left-side menu of the **Class Information** screen, click Withdraw from this class.
7. E-Track will confirm that the person has been successfully withdrawn from the session.
8. Click **OK**.

SPECIAL NOTE REGARDING REGISTRATION AND WITHDRAWAL:

If you receive the message*: **"Because all enrollments into this class must be approved by a class registrar, you will have to contact a registrar to enroll you,"*** click on the **Show List of Registrars** button, scroll down to the **Registrars** list, and call or email a session registrar to complete the enrollment/withdrawal process. If no registrar is identified, contact the host RTC.

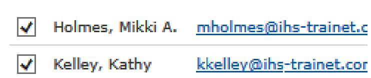
SUPPLEMENTAL TRAINING

Supplemental Training refers to training taken outside the Ohio Child Welfare Training Program that an agency or RTC elects to include in a person's E-Track training history record.

ADDING SUPPLEMENTAL TRAINING

From your **Dashboard**, after switching your login mode to Manage Trainees:

1. Click on the **Activities** tab.
2. From the left-side menu, under **I Want To:** click on Add Supplemental.
3. Use the Last Name and First Name fields to perform an individual person search ***OR*** click on the arrow ➔ icon for a list of everyone for whom you have liaison privileges.
4. Click in the box to the left to select the person(s) for whom you wish to add supplemental training. (You may select more than one person.)



5. In the left-side menu, click Add Supplemental Training.
6. On the resulting screen, fill in each field.
   - Event Title* – Type a meaningful title that reflects the training content/topic.
   - Training Provider – Type the provider organization and/or trainer name.
   - Start Date – Type or use the calendar icon to select the date on which the session began.
   - Completed Date – Type or use the calendar icon to select the date on which the session ended.
   - Hours In Class – Enter the number of hours spent in the classroom. For college or university courses, this number will reflect credit hours.
   - Licensure Units – Enter the number of licensure hours for which the training was approved, if applicable.
   - **Notes** - Type any additional information that might be useful for future reference.
7. Click on the **Add Supplemental Training** button.
8. Click **OK** to confirm the Supplemental Training entry was saved successfully.

For additional supplemental training, simply repeat the above steps.

EDITING / DELETING SUPPLEMENTAL TRAINING

From your **Dashboard**, after switching your login mode to Manage Trainees:

1. Click on the **Activities** tab.
2. Use the Last Name and First Name fields to perform an individual person search ***OR*** click on the arrow ➔ icon for a list of everyone for whom you have liaison privileges.
3. In the search results, click on the underlined name of the individual for whom you wish to edit/delete supplemental training.
4. From the left-side menu, under **Show Me:** click on This Person's History.
5. Click on the underlined title of the Supplemental Training line item you wish to edit or delete.
   - **To edit** the Supplemental Training record:
     a) Make desired changed to information fields.
     b) Click the **Save** button.
   - **To delete** the Supplemental Training record:
     a) Click **Delete**.

PRINTING CERTIFICATES

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Activities tab.
2. Use the Last Name and First Name fields to perform an individual person search ***OR*** click on the arrow icon for a list of everyone for whom you have liaison privileges.
3. In the search results, click on the underlined name of the individual for whom you wish to print a certificate.
4. From the left-side menu, under **Show Me:** click on This Person's History.
5. Click on the underlined title of a session for which the individual has a complete status (Complete or Complete-No Evaluation).
6. From the left-side menu, click on Print Certificate.
7. In the upper-right corner, click on the printer icon.
8. Select printer preference and Print.

PRINTING TRANSCRIPTS

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Activities tab.
2. Use the Last Name and First Name fields to perform an individual person search ***OR*** click on the arrow icon for a list of everyone for whom you have liaison privileges.
3. In the search results, click on the underlined name of the individual for whom you wish to obtain a transcript.
4. From the left-side menu, under **Show Me:** click on This Person's History.
5. From the left-side menu, click on Learning Transcript.
6. On the resulting screen, assign **Learning Transcript Criteria**:
   - Sort Option: Select either to sort by Learning Title or by Date. (Most frequently you'll want to sort by date.)
   - First Date: If sorting for a specified period of time, type or use the calendar icon to assign the start date for the desired time period.
   - Last Date: If sorting for a specified period of time, type or use the calendar icon to assign the end date for the desired time period.
     - ❖Leave date fields blank if you want the person's entire training history.
   - Completions/All History Statuses:
     - ❖Completions - results will include only training sessions for which the trainee has the status of either Complete or Complete-No evaluation.
     - ❖All History Statuses – results will include all training statuses: Complete, Complete-No evaluation, No-Shows, Cancellations, and Incompletes.
   - Include Supplemental History – Default is to include Supplemental History (non-OCWTP training in the transcript. If desired, click in the box to deselect.
   - Include External History – The OCWTP does not currently utilize External Training functionality, so you can leave this box unchecked.
   - Export Format – For best results, click in the field and change the export format to Adobe Acrobat (PDF).
7. Click on Run Report.

   Once the report opens in Adobe Acrobat, you can elect to either print or save the report as an Adobe Acrobat file to be able to email it as an attachment.

Contact your Regional Training Center (RTC) with questions about the contents of individual learning transcripts:

For PCSA Staff:

Central Ohio Regional Training Center (CORTC): 614-278-5910
East Central Ohio Regional Training Center (ECORTC): 740-432-2355
North Central Ohio Regional Training Center (NCORTC): 216-391-5608
Northeast Ohio Regional Training Center (NEORTC): 330-379-1867
Northwest Ohio Regional Training Center (NWORTC): 419-213-3505
Southeast Ohio Regional Training Center (SEORTC): 740-592-9082
Southwest Ohio Regional Training Center (SWORTC): 513-248-1269
Western Ohio Regional Training Center (WORTC): 937-427-4540 ext. 4

For Caregivers:

Central Ohio Regional Training Center (CORTC): 614-278-5908
East Central Ohio Regional Training Center (ECORTC): 740-432-2355
North Central Ohio Regional Training Center (NCORTC): 216-391-5608
Northeast Ohio Regional Training Center (NEORTC): 330-379-1976
Northwest Ohio Regional Training Center (NWORTC): 419-213-3505
Southeast Ohio Regional Training Center (SEORTC): 740-592-9082
Southwest Ohio Regional Training Center (SWORTC): 513-248-1269
Western Ohio Regional Training Center (WORTC): 937-427-4540 ext. 2

REPORTS

Learning Completion Detail by Hierarchy

Use this report to identify who has any Complete (Complete/Complete-No Evaluation/Waived) status for specific learnings.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on Learning Completion Detail by Hierarchy.
3. Assign report criteria:
   - **Primary Sort Options** (optional):
     - Sort Option 1: Defaults to Learning Local Code. If desired, click in the field and change to Learning Title.
   - **Secondary Sort Options** (optional):
     - Sort Option 1I Defaults to Completion Date. If desired, click in the field and select desired option.
     - Sort Option 2: Defaults to Person Name. If desired, click in the field and select desired option.
   - **History Criteria** (optional)
     - First Completion Date: Defaults to January 1 of the current year. If desired, type or use the calendar icon to assign the first date in a date range; or click in the field then click on the x to remove the default date assignment.
     - Last Completion Date: Defaults to current date. If desired, type or use the calendar icon to assign the last date of a date range; or click in the field then click on the x to remove the default date assignment.
   - **Learning Criteria** (optional)
     - Search For Learning: The most reliable way to assign learning criteria is to click on the magnifying glass icon and perform a learning search. Doing so will automatically populate the Learning Title, Learning Code, and Learning Revision fields.
     - Provider Organization Local Code: **LEAVE THIS FIELD BLANK**
   - **Person Criteria** (optional)

     It is recommended that you leave the Person Criteria fields blank. (If you want an individual's training completion history, see instructions for TRANSCRIPTS.)
     - Search For Person: If you choose to run the report for an individual, the most reliable way to assign person criteria is to click on the magnifying glass icon and perform a person search. Doing so will automatically populate the Login ID, Last Name, and First Name fields.
     - Local Person ID: **LEAVE THIS FIELD BLANK**

IMPORTANT NOTE: If any of the optional information contains an error of any kind, the report will return no results; so for best results, use the magnifying glass picker options to ensure accurate criteria assignments.

   - **Hierarchy Criteria**
     - Person Hierarchy:
       a) Click the magnifying glass icon.
       b) Click on the yellow folder icon to the left of OCWTP.
       c) Click on the yellow folder icon to the left of Regional Training Centers.
       d) Click on the yellow folder icon to the left of the Regional Training Center for your region.
       e) Click on the yellow folder icon to the left of your desired population (i.e., Staff or Caregiver & Adoptive Parent).
       f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public, Caregiver Public or Adoptive Parent Public).
       g) Click on your underlined County to select it.
     - Person Hierarchy Operator: You will most often leave the Person Hierarchy Operator at the default setting: Only this level.
   - Export Format
     - Default is TEDS Report Viewer. For best results, click in the drop-down box and select Adobe Acrobat (PDF).
4. Click Run Report.
5. At the bottom of the screen, select Open.

LEARNING NOT COMPLETED DETAIL BY HIERARCHY FOR ADMINISTRATOR
Use this report to identify who has Enrolled, Waitlisted, and Required statuses for currently scheduled sessions.

From your **Dashboard**, after switching your login mode to Manage Trainees:

1. Click on the **Report** tab.
2. Click on Learning Not Completed Detail by Hierarchy for Administrator.
3. Assign report criteria:
   - **Sort Options** - The recommended Sort Options are the default settings:

     Primary Sort Options

Sort Option 1	Learning Local Code

     Secondary Sort Options

Sort Option 1	Targeted Completion Date
Sort Option 2	Person Name

   - **History Criteria** (optional)
     - ❖ First Completion Date: Defaults to January 1 of current year. If desired, type or use the calendar icon to assign the first date in a date range; or click in the field then click on the x to remove the default date assignment.
     - ❖ Last Completion Date: Defaults to current date. If desired, type or use the calendar icon to assign the last date of a date range; or click in the field then click on the x to remove the default date assignment.
   - **Learning Criteria** (optional)
     - ❖ Search For Learning: The most reliable way to assign learning criteria is to click on the magnifying glass icon and perform a learning search. Doing so will automatically populate the Learning Title, Learning Code, and Learning Revision fields.
     - ❖ Provider Organization Local Code: **LEAVE THIS FIELD BLANK**
   - **Person Criteria** (optional)

     It is recommended that you leave the Person Criteria fields blank. (If you want an individual's training completion history, see instructions for TRANSCRIPTS.)
     - ❖ Search For Person: If you choose to run the report for an individual, the most reliable way to assign person criteria is to click on the magnifying glass icon and perform a person search. Doing so will automatically populate the Login ID, Last Name, and First Name fields.
     - ❖ Local Person ID: **LEAVE THIS FIELD BLANK**

IMPORTANT NOTE: If any of the optional information contains an error of any kind, the report will return no results; so for best results, use the magnifying glass picker options to ensure accurate criteria assignments.

   - **Hierarchy Criteria (required)**
     - ❖ Person Hierarchy:
       - **a)** Click the magnifying glass icon.
       - **b)** Click on the yellow folder icon to the left of OCWTP.
       - **c)** Click on the yellow folder icon to the left of Regional Training Centers.
       - d) Click on the yellow folder icon to the left of the Regional Training Center for your region.
       - e) Click on the yellow folder icon to the left of your desired population (i.e., Staff or Caregiver & Adoptive Parent).
       - f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public, Caregiver Public or Adoptive Parent Public).
       - g) Click on your underlined County to select it.
     - ❖ Person Hierarchy Operator: You will most often leave the Person Hierarchy Operator at the default setting: Only this level.
   - Export Format
     - ❖ Default is TEDS Report Viewer. For best results, click in the drop-down box and select Adobe Acrobat (PDF).
4. Click **Run Report**.
5. At the bottom of the page, select Open.

PLEASE BE AWARE that the report generally lists one learning per page, so be sure to scroll through the entire report.

Learnings Coming Due
DO NOT USE - The OCWTP does not use this functionality.

Learnings Past Due
DO NOT USE - The OCWTP does not use this functionality.

Master Training Schedule
Use this report to find sessions within a specific county or region and date range.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on Master Training Schedule.
3. Assign report criteria – all criteria are optional:
   - **Primary Sort Options**
     - Sort Option 1: Default is Learning Local Code. If desired, click in the drop-down field to select your primary sort option.
   - **Secondary Sort Options**
     - Sort Option 1: If desired, click in the drop-down field to select your secondary sort option.
     - Sort Option 2: If desired, click in the drop-down field to select your tertiary sort option.
   - **Session Criteria**
     - First Session Start Date: Default is January 1 of the current year. If desired, type or use the calendar icon to assign a different start date for the desired time period.
     - Last Session Start Date: Default is the current date. If desired, type or use the calendar icon to assign a different end date for the desired time period.
     - Session Local Code: LEAVE THIS FIELD BLANK.
     - Session Location: If desired, click in the drop-down fields to select the desired location.
     - Responsible Organization Local Code: If desired, the most reliable way to assign a Responsible Organization Local Code is perform a hierarchy search:
       a) Click on the magnifying glass icon to open the Choosing a Hierarchy Level screen.
       b) Click on the yellow folder icon to the left of OCWTP.
       c) Click on the yellow folder icon to the left of Regional Training Centers.
       d) Click on the underlined Regional Training Center to select.
     - Provider Organization Local Code (second field): **DO NOT PUT ANYTHING IN THIS FIELD**
     - Delivery Method: Default is All. If desired, you may change the delivery method to identify only Classroom or Online sessions.
   - **Learning Criteria**
     - Learning Title: It is recommended that you leave this field blank. If you choose to assign learning criteria, the most reliable way to do so is to click on the magnifying glass icon and perform a learning search. Doing so will automatically populate the Learning Title, Learning Local Code, and Learning Revision fields.
     - Learning Code: It is recommended that you leave this field blank. However, you may want to see listings for specific standardized sessions, such as Caseworker Core, Supervisor Core, or Assessor training. To do so, use the % wildcard on either side of the unique identifiers in the Learning Local Code field:
       - Caseworker Core: %CW%
       - Supervisor Core: %SC%
       - Assessor: 201-A%-S
     - Learning Revision: DO NOT PUT ANYTHING IN THIS FIELD
     - Provider Organization Local Code: DO NOT PUT ANYTHING IN THIS FIELD
   - **Export Format**
     - Click in field and select the export format that best meets your need.
       Recommended options are Adobe Acrobat (PDF), Microsoft Excel (XLS), or Microsoft Word (DOCX).
4. Click Run Report.

NON-COMPLETED LEARNING BY HIERARCHY

Use this report to identify individuals under a specific supervisor or within a specific county or region who have NOT attended a specific learning. For instance, if your county requires all employees to take 117-8: (CW 3 hr) Zero 2 Three, A to Z, you can use this report to identify who has not yet completed the learning.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on Non-Completed Learning By Hierarchy.
3. Assign report criteria – all criteria are optional:
   - **Primary Sort Options** (optional)
     - Sort Option 1: Default is Person Name. If desired, click in the drop-down field to select your primary sort option.
   - **Date Criteria** (optional)
     - Search Date: If desired, type or use the calendar icon to assign specific date. This option is useful if your agency held a mandatory training event on a specific date and you need to know who was not in attendance.
     - Sort Option 2: If desired, click in the drop-down field to select your tertiary sort option.
   - **Learning Criteria** (required)
     - Search for Learning: The most reliable way to do so is to click on the magnifying glass icon and perform a learning search. Doing so will automatically populate the Learning Title and Learning Local Code fields.
     - Learning Title: If you opt to assign the learning criteria using the Learning Title field, type all or part of the learning title into the field, using wildcards for unknown information.
     - Learning Code: If you opt to assign the learning criteria using the Learning Code field, type all or part of the learning code into the field, using wildcards for unknown information. You can also use the Learning Code field to see listings for groups of standardized learnings, such as Caseworker Core, Supervisor Core, or Assessor training. To do so, use either the asterisk (*) or percent (%) wildcard on either side of the unique identifiers in the Learning Local Code field:
       - Caseworker Core: %CW%
       - Supervisor Core: %SC%
       - Assessor: 201-A%-S
   - **Supervisor Criteria** (optional)
     Use this option to see which direct reports of the assigned supervisor has not attended the required training session.
     - Local Person ID: DO NOT TYPE INTO THIS FIELD. To run the report using supervisor criteria, either click on the magnifying glass icon to perform a person search or type the supervisor's name into the Last Name and First Name fields.
     - Last Name: If desired, type the supervisor's last name into this field.
     - First Name: If desired, type the supervisor's first name into this field.
   - **Hierarchy Criteria**
     - Person Hierarchy:
       a) Click the magnifying glass icon.
       b) Click on the yellow folder icon to the left of OCWTP.
       c) Click on the yellow folder icon to the left of Regional Training Centers.
       d) Click on the yellow folder icon to the left of the Regional Training Center for your region.
       e) Click on the yellow folder icon to the left of your desired population (i.e., Staff or Caregiver & Adoptive Parent).
       f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public, Caregiver Public or Adoptive Parent Public).
       g) Click on your underlined County to select it.
     - Person Hierarchy Operator: You will most often leave the Person Hierarchy Operator at the default setting: Only this level.
   - Export Format
     - Click in the drop-down box and select Adobe Acrobat (PDF).

4. Click Run Report.

OAC Caseworker Core Compliance Report

Use the OAC Caseworker Core Compliance report to identify who has met caseworker core training requirements in accordance to the Ohio Administrative Code (OAC 5101:2-33-55). The report only captures individuals identified in E-Track as OAC Caseworkers and with an OAC Training Effective Date of 10/01/2009 or later. If OAC Training Effective Dates or Hire Dates are incorrect in E-Track, the report will not be accurate. Use the E-Track Add/Edit Person Form to submit corrections.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on OAC Caseworker Core Compliance.
3. Assign report criteria:
   - Person Hierarchy: For each compliance report, you will need to select the hierarchy on which the report is generating results. E-Track uses hierarchies to sort people by:
     - Population (such as staff or foster caregivers)
     - Region
     - County

     a) To the right of the Person Hierarchy field, click on the magnifying glass icon.

     b) Click on the yellow folder icon to the left of OCWTP.

     c) Click on the yellow folder icon to the left of Regional Training Centers.

     d) Click on the yellow folder icon to the left of the Regional Training Center for your region.

     e) Click on the yellow folder icon to the left of your desired population (i.e., Staff).

     f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public).

     g) Click on your underlined County to select it.

   - Person Hierarchy Operator**:** The default is **Only this level**. You will run the report using **Only this level** as the hierarchy operator, unless you are trying to obtain regional or statewide results. If you need to change the hierarchy operator, click on the drop-down field to make another selection**.**
   - Show Hierarchy in Report: The default is to show the person's hierarchy in a column of the report. If you have no need to see the hierarchy on the report, click on this box to deselect.

   o Export Format: The default is **TEDS Report Viewer**. This is a view only option. Click in the drop-down field and select Excel if you want the ability to sort, print, and save the report, or Adobe Acrobat (PDF) if you want to save or print the report.
4. Click Run Report.

OAC Caseworker Ongoing Compliance Report

Use the OAC Caseworker Ongoing Compliance report to identify who has met caseworker ongoing training requirements in accordance to the Ohio Administrative Code (OAC 5101:2-33-55). The report only captures individuals identified in E-Track as OAC Caseworkers whose OAC Training Effective Date is more than one year ago OR whose hire date is more recent than their OAC Training Effective Date. If OAC Training Effective Dates or Hire Dates are incorrect in E-Track, the report will not be accurate. Use the E-Track Add/Edit Person Form to submit corrections.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on OAC Caseworker Ongoing Compliance.
3. Assign report criteria:
   - Person Hierarchy: For each compliance report, you will need to select the hierarchy on which the report is generating results. E-Track uses hierarchies to sort people by:
     - Population (such as staff or foster caregivers)
     - Region
     - County

     a) To the right of the Person Hierarchy field, click on the magnifying glass icon.

     b) Click on the yellow folder icon to the left of OCWTP.

     c) Click on the yellow folder icon to the left of Regional Training Centers.

     d) Click on the yellow folder icon to the left of the Regional Training Center for your region.

     e) Click on the yellow folder icon to the left of your desired population (i.e., Staff).

     f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public).

     g) Click on your underlined County to select it.

   - Person Hierarchy Operator**:** The default is **Only this level**. You will run the report using **Only this level** as the hierarchy operator, unless you are trying to obtain regional or statewide results. If you need to change the hierarchy operator, click on the drop-down field to make another selection**.**
   - Show Hierarchy in Report: The default is to show the person's hierarchy in a column of the report. If you have no need to see the hierarchy on the report, click on this box to deselect.

   o Export Format: The default is **TEDS Report Viewer**. This is a view only option. Click in the drop-down field and select Excel if you want the ability to sort, print, and save the report, or Adobe Acrobat (PDF) if you want to save or print the report.
4. Click Run Report.

OAC Supervisor Core Compliance Report

Use the OAC Supervisor Core Compliance report to identify who has met supervisor core training requirements in accordance to the Ohio Administrative Code (OAC 5101:2-33-55). The report only captures individuals identified in E-Track as OAC Supervisors and with an OAC Training Effective Date of 10/01/2009 or later. If OAC Training Effective Dates or Hire Dates are incorrect in E-Track, the report will not be accurate. Use the E-Track Add/Edit Person Form to submit corrections.

From your **Dashboard**, after switching your login mode to Manage Trainees:

1. Click on the **Report** tab.
2. Click on OAC Supervisor Core Compliance.
3. Assign report criteria:
   - Person Hierarchy: For each compliance report, you will need to select the hierarchy on which the report is generating results. E-Track uses hierarchies to sort people by:
     - Population (such as staff or foster caregivers)
     - Region
     - County

     a) To the right of the Person Hierarchy field, click on the magnifying glass icon.

     b) Click on the yellow folder icon to the left of OCWTP.

     c) Click on the yellow folder icon to the left of Regional Training Centers.

     d) Click on the yellow folder icon to the left of the Regional Training Center for your region.

     e) Click on the yellow folder icon to the left of your desired population (i.e., Staff).

     f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public).

     g) Click on your underlined County to select it.

   - Person Hierarchy Operator**:** The default is **Only this level**. You will run the report using **Only this level** as the hierarchy operator, unless you are trying to obtain regional or statewide results. If you need to change the hierarchy operator, click on the drop-down field to make another selection**.**
   - Show Hierarchy in Report: The default is to show the person's hierarchy in a column of the report. If you have no need to see the hierarchy on the report, click on this box to deselect.
   - Export Format: The default is **TEDS Report Viewer**. This is a view only option. Click in the drop-down field and select Excel if you want the ability to sort, print, and save the report, or Adobe Acrobat (PDF) if you want to save or print the report.
4. Click **Run Report**.

OAC SUPERVISOR ONGOING COMPLIANCE REPORT

Use the OAC Supervisor Ongoing Compliance report to identify who has met supervisor ongoing training requirements in accordance to the Ohio Administrative Code (OAC 5101:2-33-55). The report only captures individuals identified in E-Track as OAC Supervisors whose OAC Training Effective Date is more than one year ago OR whose hire date is more recent than their OAC Training Effective Date. If OAC Training Effective Dates or Hire Dates are incorrect in E-Track, the report will not be accurate. Use the E-Track Add/Edit Person Form to submit corrections.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on OAC Supervisor Ongoing Compliance.
3. Assign report criteria:
   - ❖ Person Hierarchy: For each compliance report, you will need to select the hierarchy on which the report is generating results. E-Track uses hierarchies to sort people by:
     - Population (such as staff or foster caregivers)
     - Region
     - County

     a) To the right of the Person Hierarchy field, click on the magnifying glass icon.

     b) Click on the yellow folder icon to the left of OCWTP.

     c) Click on the yellow folder icon to the left of Regional Training Centers.

     d) Click on the yellow folder icon to the left of the Regional Training Center for your region.

     e) Click on the yellow folder icon to the left of your desired population (i.e., Staff).

     f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public).

     g) Click on your underlined County to select it.

   - ❖ Person Hierarchy Operator**:** The default is **Only this level**. You will run the report using **Only this level** as the hierarchy operator, unless you are trying to obtain regional or statewide results. If you need to change the hierarchy operator, click on the drop-down field to make another selection**.**
   - ❖ Show Hierarchy in Report: The default is to show the person's hierarchy in a column of the report. If you have no need to see the hierarchy on the report, click on this box to deselect.

   o Export Format: The default is **TEDS Report Viewer**. This is a view only option. Click in the drop-down field and select Excel if you want the ability to sort, print, and save the report, or Adobe Acrobat (PDF) if you want to save or print the report.
4. Click Run Report.

SPECIFIED COMPLETION STATUS REPORT

Use this report to identify and support individuals with a specified status (Complete, Complete-No Evaluation, No Show, Cancelled, Incomplete, In Progress, Waived, etc.). For example, a person with multiple statuses of Complete-No Evaluation may need technical support regarding logging into E-Track and finishing the survey submission process.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on Specified Completion Status Report.
3. Assign report criteria:
   - First Completion Date: Defaults to the current date. If desired, type or use the calendar icon to assign the first date of the desired time period.
   - Last Completion Date: Defaults to the current date. If desired, type or use the calendar icon to assign the last date of the desired time period.
   - Completion Status: Default is Any/All. If desired, click in the drop-down field to select the desired completion status option.
   - Person Hierarchy:
     - **a.** Click the magnifying glass icon.
     - **b.** Click on the yellow folder icon to the left of OCWTP.
     - **c.** Click on the yellow folder icon to the left of Regional Training Centers.
     - **d.** Click on the yellow folder icon to the left of the Regional Training Center for your region.
     - **e.** Click on the yellow folder icon to the left of your desired population (i.e., Staff or Caregiver & Adoptive Parent).
     - **f.** Click on the yellow folder icon to the left of your desired population (i.e., Staff Public, Caregiver Public or Adoptive Parent Public).
     - **g.** Click on your underlined County to select it.
   - Person Hierarchy Operator: Defaults to “Only this level”. It is recommended that you leave the Person Hierarchy Operator at the default setting. If desired, click in the drop-down field to select a different hierarchy operator.
   - Export Format: Defaults to “TEDS Report Viewer”. Click in field and select the export format that best meets your need. Recommended options are Adobe Acrobat (PDF), Microsoft Excel (XLS), or Microsoft Word (DOCX).
4. Click Run Report.

STAFF HIRE/OAC/IDP DATES

Use this report to easily see profile information, including hire date, person type, OAC training effective date, and active IDP titles/due dates.

From your Dashboard, after switching your login mode to Manage Trainees:

1. Click on the Report tab.
2. Click on Staff Hire/OAC/IDP Dates.
3. Assign report criteria:
   - **Person Criteria:**
     It is recommended that you leave the Person Criteria fields blank; however, you can fill in the person criteria if you want to run this report for an individual:
     - Search For Person: If you choose to run the report for an individual, the most reliable way to assign person criteria is to click on the magnifying glass icon and perform a person search. Doing so will automatically populate the Login ID, Last Name, and First Name fields.
     - Local Person ID: **LEAVE THIS FIELD BLANK**
     - Person Type: Defaults to "All". If desired, check the box to the left of a different person type.

   IMPORTANT NOTE: If <u>any</u> of the optional information contains an error of any kind, the report will return no results; so for best results, use the magnifying glass picker options to ensure accurate criteria assignments.

   - **Hierarchy Criteria**
     - Person Hierarchy:
       a) Click the magnifying glass icon .
       b) Click on the yellow folder icon to the left of OCWTP.
       c) Click on the yellow folder icon to the left of Regional Training Centers.
       d) Click on the yellow folder icon to the left of the Regional Training Center for your region.
       e) Click on the yellow folder icon to the left of your desired population (i.e., Staff or Caregiver & Adoptive Parent).
       f) Click on the yellow folder icon to the left of your desired population (i.e., Staff Public, Caregiver Public or Adoptive Parent Public).
       g) Click on your underlined County to select it.
     - Person Hierarchy Operator: It is recommended that you leave the Person Hierarchy Operator at the default setting: Only this level.
     - Show Hierarchy in Report: Check this box if you want the hierarchy path displayed in your search results.
   - Export Format: Click in field and select the export format that best meets your need.
     Recommended options are Adobe Acrobat (PDF), Microsoft Excel (XLS), or Microsoft Word (DOCX).
4. Click Run Report .

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MUST-DOs for Managing County-Level Registrations

1. **IT IS RECOMMENDED THAT INDIVIDUAL PARTICIPANTS ENROLL THEMSELVES** in training sessions in E-Track. However, those **COUNTY TRAINING LIAISONS** who continue to gather registrations **MUST ENTER ENROLLMENTS INTO E-TRACK AS THEY OCCUR** and absolutely **BEFORE THE SESSION START DATE**. The only individuals who should ever be registered retroactively after a session occurs are walk-in attendees (which should be very rare).

   Enrolling people ASAP into E-Track is vital in order for participants to receive essential E-Track notifications (i.e., enrollment, enrollment reminder, session change, session cancellation, and session evaluation survey, session completion and certificate) in time to be useful to the participants and the larger training program. This is also an opportune time for county liaisons to submit E-Track Add-Person forms for any new hires within the OCWTP population.

2. **SIGN-IN SHEETS MUST BE SUBMITTED TO RTCS WITHIN TWO DAYS OF THE SESSION END DATE**—whether scanned and emailed, faxed, or hand-delivered. This information is essential for RTCs in enrolling walk-in participants, ensuring that all participants receive evaluation surveys in a timely manner, and assigning the correct completion status to session participants.

3. E-Track person records are created for Preservice participants when they become *licensed* caregivers. Consequently, Preservice sessions are the only OCWTP sessions where paper evaluation surveys and certificates are distributed**. NO PAPER SURVEYS AND CERTIFICATES SHOULD BE DISTRIBUTED IN ANY OTHER OCWTP CLASSROOM SESSION, AS SURVEYS ARE NOW ADMINISTERED ELECTRONICALLY THROUGH E-TRACK TO THE OCWTP POPULATION.** Guest participants who wish to complete an evaluation or receive a training certificate can do so by contacting their RTC.

4. **PARTICIPANTS HAVE A MAXIMUM OF SEVEN CALENDAR DAYS TO COMPLETE ONLINE EVALUATION SURVEYS** (potentially fewer if they are walk-in attendees). **RTCs PROCESS THE ROSTER 8-10 DAYS AFTER THE SESSION END DATE**, in order to allow participants the full seven days to complete evaluations. **IT IS THE PROCESSING OF THE ROSTER THAT GENERATES THE LEARNING COMPLETION (CERTIFICATE) NOTIFICATION.** Even if a participant completes an evaluation the day after the session, that participant will not receive a certificate notification until the roster is processed 8-10 days after the session occurs. RTCs can process the roster early for persons requiring an immediate certificate for licensure purposes, provided these individuals have submitted their surveys.