E-Track

Version 19x

Quick-Start Guide for Supervisors

8/2019

QUICK-START GUIDE FOR SUPERVISORS:

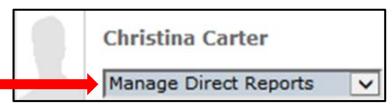
- Viewing a Direct Report's To Do List (a list of scheduled training and other items to be completed)
- Viewing a Direct Report's Learning History
- Printing a Certificate
- Printing a Transcript
- Enrolling a Direct Report in a Session
- Withdrawing a Direct Report from a Session
- Viewing and Updating a Direct Report's Profile Information
- Managing Supplemental Training

REMEMBER!!

This guide provides abbreviated instructions for supervisors to work with their direct reports' training records. Find more detailed instructions in the E-Track Help Center at http://e-track.knowledgeowl.com/help/.

Getting Started

To perform supervisor functions, after logging into E-Track you must click in the field below your name and switch your login mode from My Activities to Manage Direct Reports.



Once you've switched to Manage Direct Reports mode, your direct reports will appear on the Direct Report Activities screen. If the list is incorrect, submit an online Add/Edit form (http://www.surveygizmo.com/s3/2309497/E-Track-Add-Edit-Person) to request necessary updates.

LOG INTO E-TRACK:

1. Go to the E-Track login screen: https://e-track.teds.com/EveryOne/TEDSEveryOne.jsp
2. Type your login ID into the Login field.
3. Type your password into the Password field.
4. Click on the **Log in** button.
5. Click in the login mode field (upper-left corner, under your name) and change your login mode from My Activities to Manage Direct Reports.

HELPFUL HINTS:

- ✓ **Regularly review your own profile information and, if necessary, use the E-Track Add/Edit Person online form (http://www.surveygizmo.com/s3/2309497/E-Track-Add-Edit-Person) to submit updates before changing your login mode.**
- ✓ **Regularly review your list of direct reports and submit an E-Track Add/Edit Person online request (http://www.surveygizmo.com/s3/2309497/E-Track-Add-Edit-Person) to make necessary updates.**

VIEW AND UPDATE DIRECT REPORT PROFILE INFORMATION:

From the **Direct Report Activities** screen:

1. Click on the **Profile** tab.
2. To the right of the individual's name, click on Personal Information.
   - If any of the information on the resulting screen is incorrect, click on **Update Personal Information**.
   - Fill in all Required Fields* as well as any fields that require correction.
   - In the **Additional Notes** field, type any information that might be helpful in clarifying requested changes.
   - Click **Submit** .
3. Click on either Return to the previous screen (in the left-side menu) or the back arrow icon (in the upper-right corner) to return to the **Profile** screen.
4. When you have finished, click on the **Activities** tab to return to the **Direct Report Activities** screen.

VIEW A DIRECT REPORT'S TO-DO LIST:

From the **Direct Report Activities** screen:

1. Click on the person's **To Do List** button.

   HELPFUL HINTS:

   -You can navigate from the Work with My Direct Reports' To Do List screen directly to your direct report's training history by clicking on This Person's History in the left-side menu.

   -You can print the information on these screens by clicking on the printer icon in the upper right corner.

VIEW A DIRECT REPORT'S LEARNING HISTORY:

From the **Direct Report Activities** screen:

1. Click on **History** the person's button.

   HELPFUL HINTS:

   -You can navigate from the History screen directly to your direct report's To Do List by clicking on This Person's To Do List in the left-side menu.

   -You can print the information on these screens by clicking on the printer icon in the upper right corner.

PRINT A TRANSCRIPT:

From the **Work with My Direct Reports' History** screen:

1. From the left-side menu, click Learning Transcript.
2. On the resulting screen, assign criteria:
   - Sort Option: Select either to sort by Learning Title or by Date. (Most frequently you'll want to sort by date.)
   - First Date/Last Date: Type or click on the calendar icons to define a timeframe.
     - Leave date fields blank to see the person's entire training history.
   - Completions/All History Statuses: The default setting is to run the report for Completion statuses only. Click on the radio button for All History Statuses if you wish to select this option.
     - Completions – Results will include only session for which the trainee has the status of "Complete", "Complete-No evaluation" or "Waived" status.
     - All History Statuses – Results will include *all* training history, including completions, no-shows, cancellations, and incomplete statuses.
   - Include Supplemental History – Select whether or not to include Supplemental History (non-OCWTP training) in the transcript. (The default setting is to include supplemental (non-OCWTP) training.)
   - Include External History – Leave unchecked. The OCWTP does not currently utilize External History functionality.
   - Export Format – For best results, click in the field and select Adobe Acrobat (PDF).
3. Click Run Report.

   Understanding the report:

   - OCWTP training is listed separately from supplemental (non-OCWTP) training.
   - **"Hours"** refers to time in class.
   - **"Licensure Hours"** refers to Counselor and Social Worker Board licensure credit.

After following the prompts to open the Adobe file, you can elect to either print the report or save it as an Adobe Acrobat document.

PRINT A CERTIFICATE:

From the **Work with My Direct Reports' History** screen:

1. Click on the Underlined Session Title of any session for which the status is "Complete" or "Complete-No Evaluation".
2. From the left-side menu, click Print Certificate.
3. In the upper-right corner, click on the printer icon.
4. Click Print.

SEARCH FOR LEARNING

Basic Learning Searches:

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.)

Search by Learning Title:

1. From your **Direct Report Activities** screen, select the Title radio button.
2. Click in the Search... field and type all or part of the learning title.
   Helpful Hint: For best results, use only one or two significant words in the title.
3. Click on the search button.
4. Click on the button to navigate to the **Enroll in a learning** screen.

Search by Learning Local Code:

1. From your **Direct Report Activities** screen, select the Local Code radio button.
2. Click in the Search... field and type all or part of the learning local code.
3. Click on the search button.
4. Click on the button to navigate to the **Enroll in a learning** screen.

SEARCH FOR LEARNING (cont'd)

Advanced Learning Search:

In addition to searching by the learning code or title, you can use Advanced Search options to search within a date range, region, or classification (caseworkers, foster caregivers/adoptive parents, or supervisors/managers, and topic/subtopic).

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

1. From your **Direct Report Activities** screen, click on Advanced Search the button to reveal the advanced search options.
2. Assign search criteria:
   - Class Start Date Between - Find sessions within a specific date range:
     - Type or use the calendar icons to assign a date range.
   - Geographic County - Identify sessions being held within a specific county:
     - Click in the drop-down field to select a county/location.
   - Learning Status - Default setting is "Active" - DO NOT CHANGE
   - Type - Select a specific delivery method:
     - Classroom - Sessions held at a physical location at designated times.
     - External Web Based - Online training developed by an outside entity that has been vetted and approved as OCWTP training.
     - Online TEDS - Online training developed specifically for the OCWTP.
     - Self Study - DO NOT USE
     - Video Teleconferencing - DO NOT USE
     - Web Conferencing (blended learning) - A blend of in-person (either classroom or "virtual classroom") and independent online training.

     HELPFUL HINT: Leaving the Type field blank will return ALL types of learning.
   - Regional Training Center - Find sessions being held anywhere in a particular region:
     - Click on the magnifying glass icon.
     - Click on the yellow OCWTP folder icon. (You *must* click *on the folder*.)
     - Click on the yellow Regional Training Centers folder icon.
     - Click on the desired Regional Training Center to select.
   - Classification - Possibly the best way to identify training that addresses high priority training needs. Use classifications to identify sessions that address a specific topic/area of need:
     - Click on the magnifying glass icon.
     - Click on the appropriate yellow folder icon(s) to reveal more specific topics/classifications.
     - Once the desired topic is located, click on the Underlined Classification Title to select.
3. After all desired search criteria has been entered, click on the Search button.
4. Click on the Sessions button to navigate to the **Enroll in a learning** screen.

HELPFUL HINT: If no search results are returned, click on the Clear button, then broaden your search criteria and try again.

SEARCH FOR LEARNING (cont'd)

Competency Catalog Search:

Searching for training using a Competency Catalog Search is especially useful when trying to find sessions that address a specific competency that has been identified as a high-priority training need on a worker's ITNA.

To search by competency:

1. From your **Direct Report Activities** screen, click on the CATALOGS tab.
2. Click on the Competency Catalog option.
3. To the left of the desired topic, click on the plus sign icon to reveal skill sets in that topic area.
4. To the left of the desired skill set, click on the plus sign icon to reveal the competencies under that skill set.
5. Then click on the blue, underlined competency to select.
6. On the resulting screen, all existing learnings that address the selected competency are listed in the **Suggestions** section. Clicking on the Underlined Learning Title will display the learning description and give you the options of either enrolling or requesting a new session.
7. From the left-side menu, click on Enroll or View available dates for this Learning to navigate to the Enroll in a learning screen.

IMPORTANT!!! THE FOLLOWING OPTIONS DO NOT RESULT IN SESSION ENROLLMENT:

Request a New Session – If there are no currently-scheduled sessions, or if none of the currently-scheduled sessions are suitable, use the Request a New Session option to request a new session be scheduled in your region.

Suggest a New Learning – If classification and/or competency searches result in no suggested learnings, or if none of the suggested learnings address a topic you've identified as a training need, you may opt to click on the Advanced Search button and use the Suggest a New Learning option (in the upper-right corner of the search criteria screen) to request that a new learning be developed.

ENROLL A DIRECT REPORT IN A SESSION:

From the **Direct Report Activities** screen:

1. Use one of the Search for Learning options to locate the desired session.
2. From the Learning Search results, determine which learning might meet your direct report's training need.
3. Click on the Sessions button to advance to the **Enroll in a learning** screen, where you'll see a complete description of the learning, as well as information regarding currently-scheduled sessions that meet your search criteria.

   HELPFUL HINTS:

   - **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 Search for Trainees screen. (Return to the Enroll in a learning screen by clicking on Return to the previous screen in the left-side menu options.)**
   - **From the Enroll in a Learning screen, you can click on the radio buttons to toggle between Matching Sessions (the list of scheduled sessions 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).**
   - **If there are currently no scheduled sessions, or if none of the currently-scheduled sessions are suitable, use the Request a New Session option to request a new session be scheduled in your region.**

4. Locate the desired session and click on the ENROLL button (to the far left of the session).
5. Click in the box to the left of a person's name to select. (You may select more than one person or click on Check All Persons to select all your direct reports.)
6. From the left-side menu, click on Enroll.
7. Click OK to confirm enrollment.

WITHDRAW A DIRECT REPORT FROM A SESSION:

From the **Direct Report Activities** screen:

1. Click on the person's To Do List button.
2. Click on the Underlined Session Title.
3. From the left-side menu, click on Withdraw from this class.
4. Again, from the left-side menu, click on Withdraw from this class.
5. 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." you must contact one of the session registrars to complete the enrollment/withdrawal process. If no registrar is identified, contact the host Regional Training Center.

MANAGING SUPPLEMENTAL TRAINING

Add Supplemental Training

From the Direct Report Activities screen:

1. Check the box to the left of the person for whom you wish to add supplemental training.

   NOTE: You may select multiple people ***only if each person attended the same training session.***

2. From the left-side menu, select Add Supplemental.
3. Fill in each field.
   - Event Title* – Type a meaningful title.
   - Training Provider – Type the name of the trainer and/or the sponsor/organization.
   - Start Date – Type or use the calendar icon to identify the date on which the session started.
   - Completed Date – Type or use the calendar icon to identify the date on which the session started.
   - Time In Class – Enter the number of hours spent in the classroom. For college or university courses, this number will reflect credit hours.
   - Credit Units – Enter the number of licensure hours for which the training was approved, if applicable.
   - Notes – Type additional relevant information.
4. Click **Add Supplemental Training** .
5. Click **OK** .

Viewing Supplemental Training:

From the Direct Report Activities screen:

1. Click on the **History** person's button.
2. Locate and click on the underlined title of the Supplemental Training line item to view details.

Editing Supplemental Training:

NOTE: You can only edit supplemental training events that YOU created.

From the Direct Report Activities screen:

1. Click on the **History** person's button.
2. Click on the underlined title of the Supplemental Training line item to view details.
3. Make desired changes.
4. Click **Save** .

Deleting Supplemental Training:

NOTE: You can only delete supplemental training events that YOU created.

From the Direct Report Activities screen:

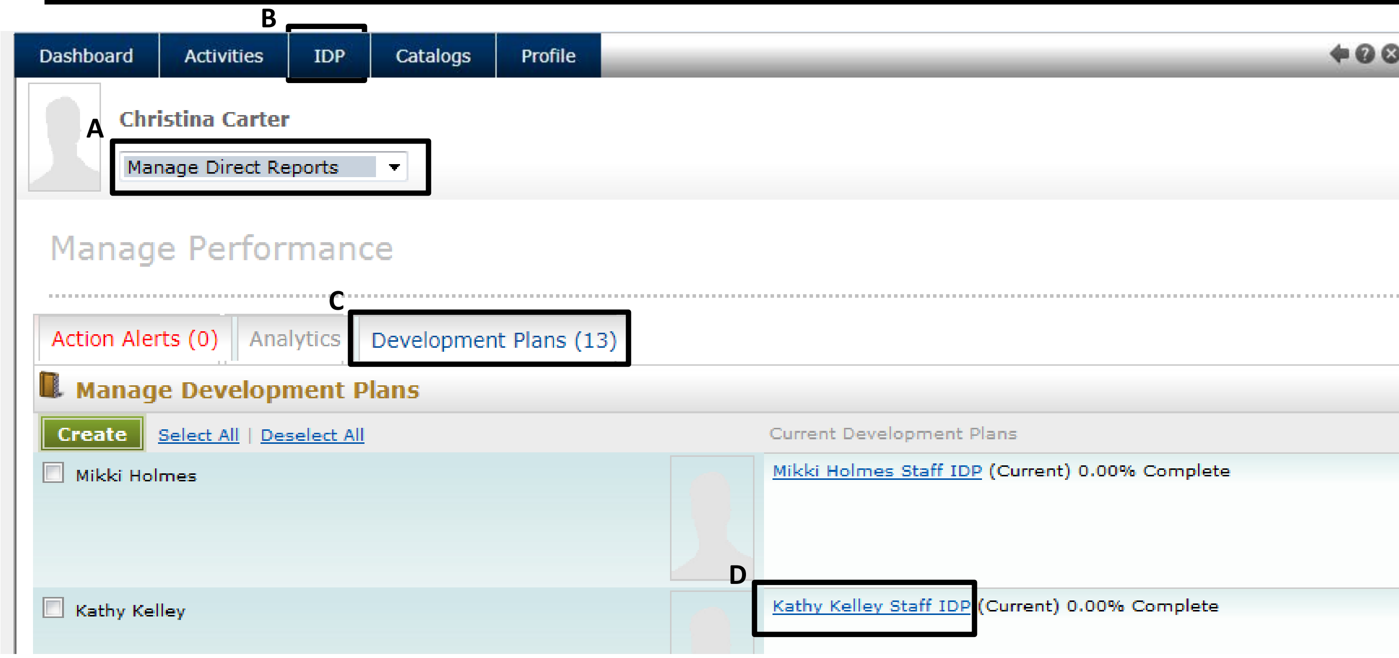
1. Click on the **History** person's button.
2. Click on the underlined title of the Supplemental Training line item.
3. Click **Delete** .

Working with Your Direct Report’s IDP in E-Track

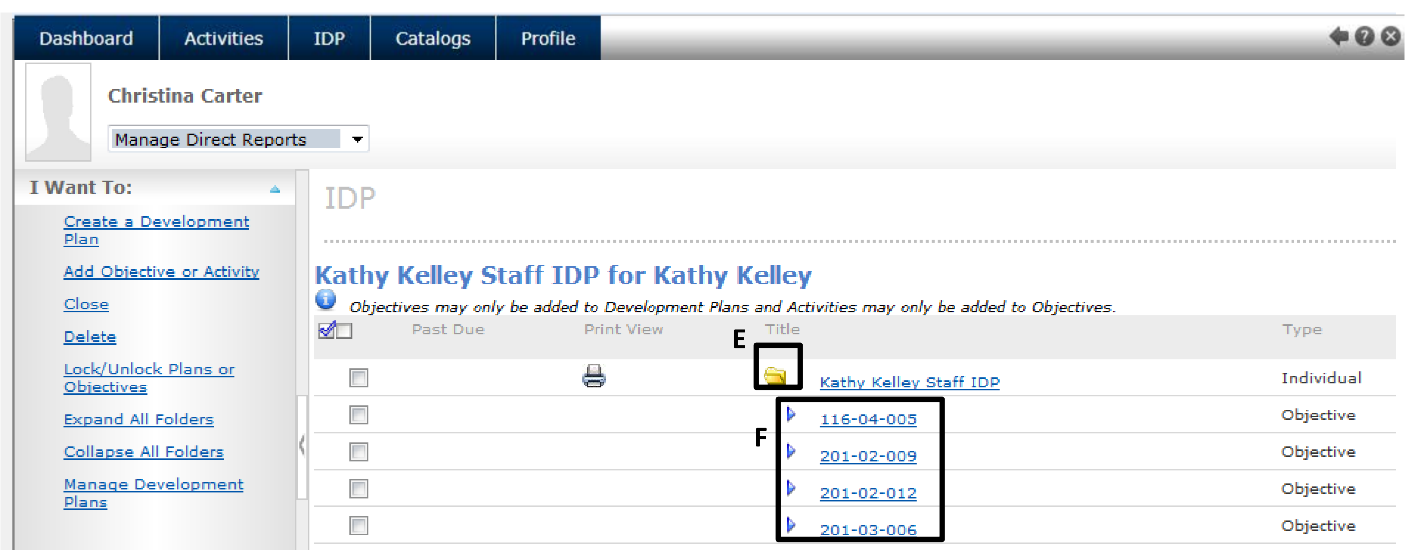
(Revised 2/19 for TEDS Version 18.2.001)

ACCESS YOUR DIRECT REPORT’S IDP:

1. Log into E-Track (https://e-track.teds.com/EveryOne/TEDSEveryOne.jsp) and switch to “Manage Direct Reports” login mode (A).
2. Click on the IDP tab (B) along the top of your screen and then the yellow “Development Plans” tab (C) on the resulting screen.
3. Select the underlined title of the direct report’s IDP (D) with which you wish to work.

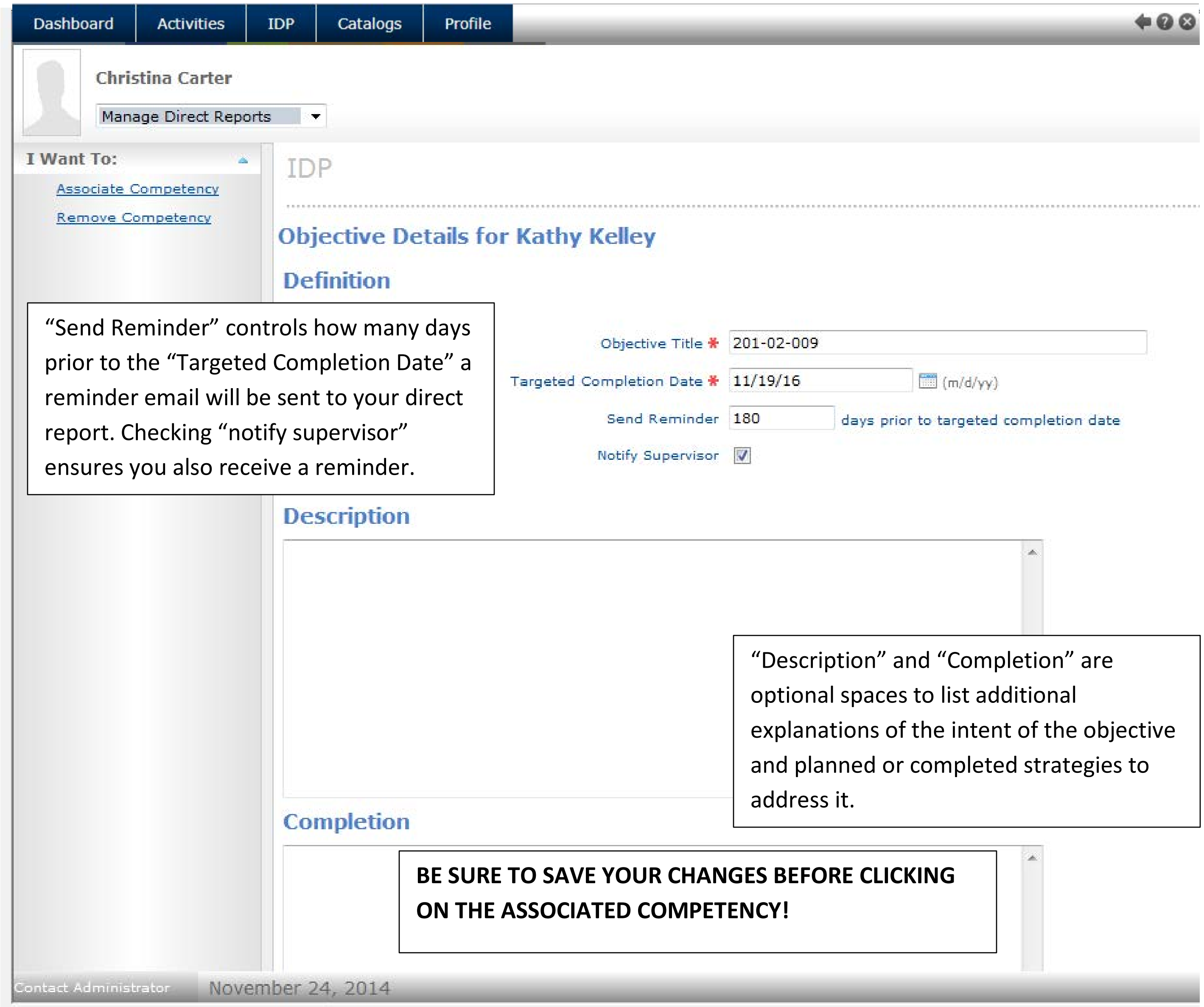


4. On the resulting screen, click on the yellow folder to the left of the direct report’s underlined IDP title (E) to expand the IDP and see its individual objectives (F).



REVIEW/EDIT DIRECT REPORT'S OBJECTIVE DETAILS:

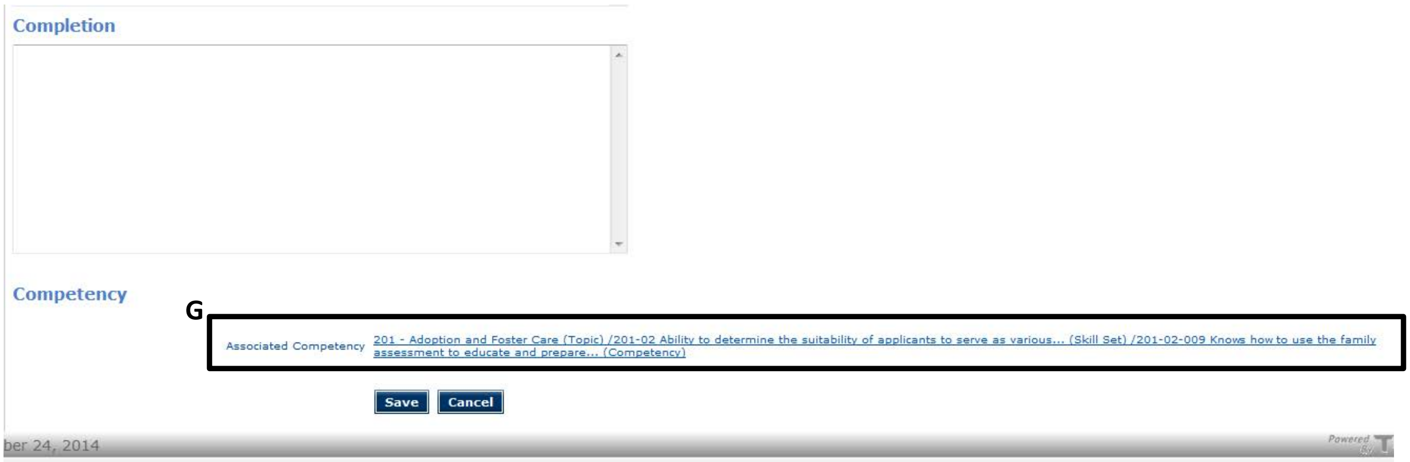
5. Click on an underlined objective (F--previous page) to open it and edit the details as you see fit:



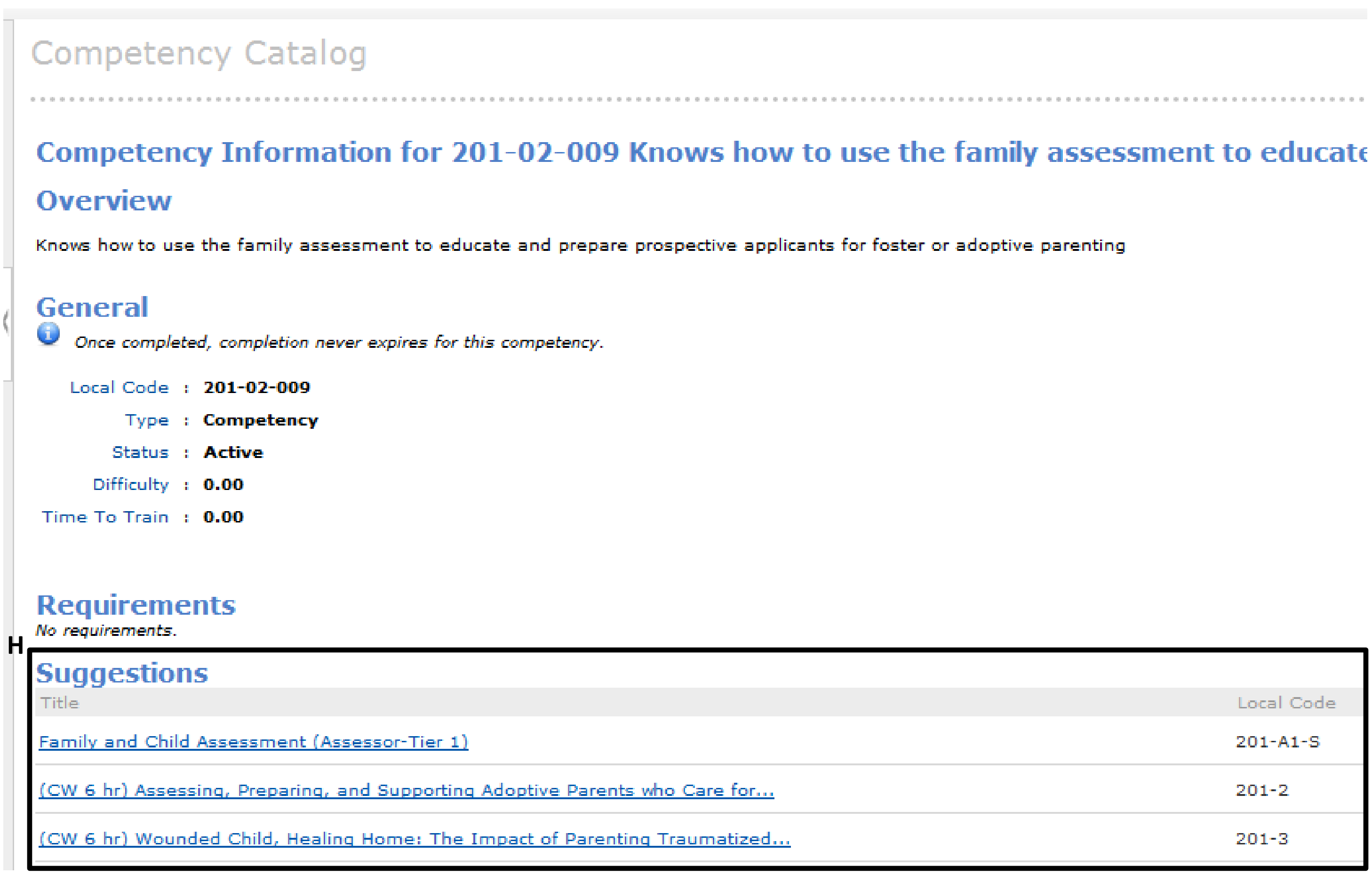
6. **SAVE ANY EDITS YOU MAKE** to the objective details *PRIOR* to clicking on the linked competency at the bottom of the objective. The objective will automatically close after you save it. You will need to reopen it to proceed with exploring its associated competency in the next step.

LOCATE/ENROLL DIRECT REPORT IN INTERVENTIONS TO ADDRESS OBJECTIVES:

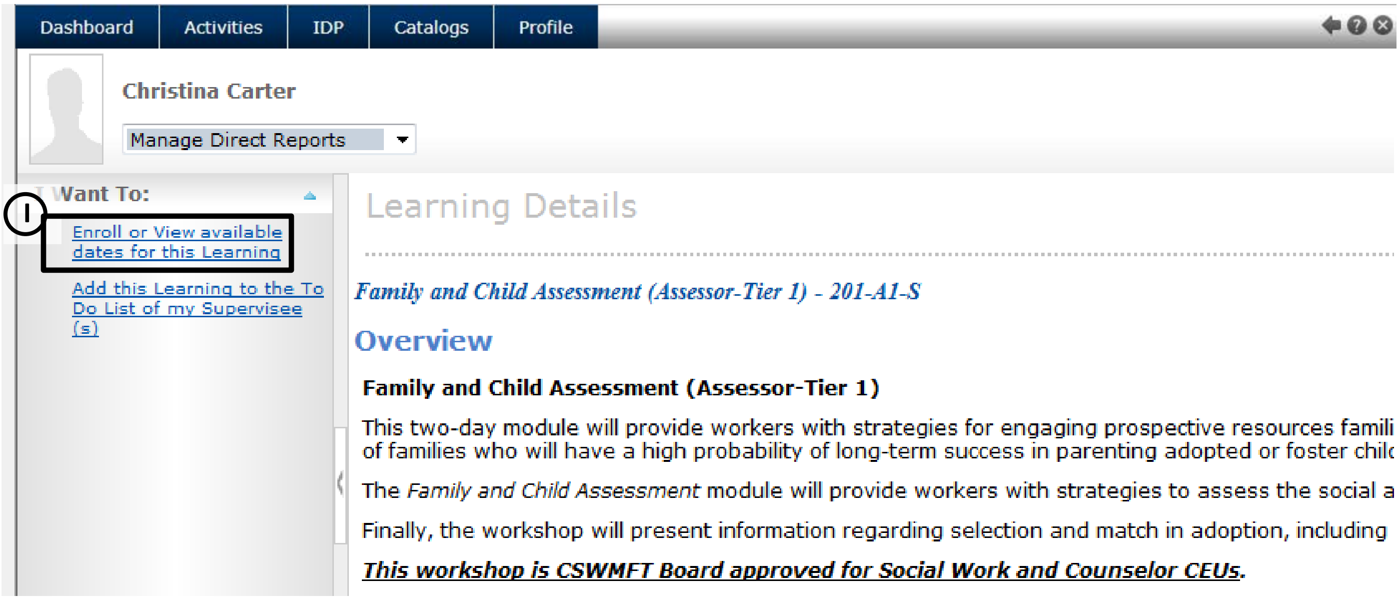
7. Open the objective and click on the linked competency statement (G) underlined at the bottom of the objective details:



8. On the resulting screen, review the list of Learning intervention "Suggestions" (H) and click on any of interest to see more details:

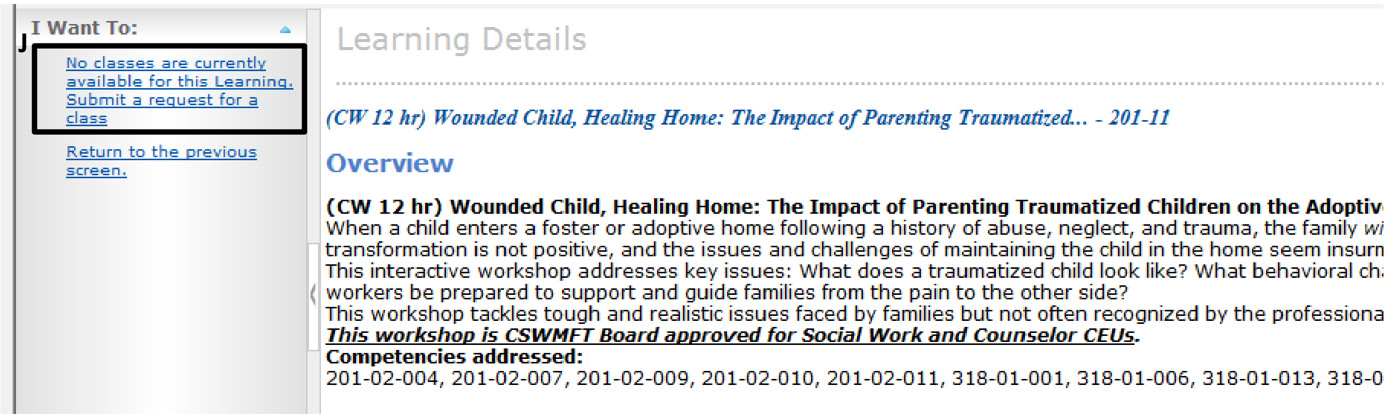


9. If the learning intervention has sessions scheduled, you can click on “Enroll or View available dates for this Learning” (I) at the top of the left-side menu to review scheduled dates and locations for the learning (or skip to step 11 if you don’t see this option).



10. Click to see more details about a scheduled session; click to enroll a direct report in the session; or click if none of the scheduled sessions suit your direct report’s schedule.

11. If there are currently no scheduled sessions of this learning, you can click on "No classes are currently available for this Learning. Submit a request for a class" (J) at the top of the left-side menu (J) to request that a new offering of this learning intervention be scheduled to meet your direct report's needs.



OTHER OPTIONS TO CONSIDER:

Sometimes your direct report has knowledge/skill development needs that require a custom-tailored solution like shadowing, coaching, or independent study of print or video resources. Here's how to address those in an IDP:

SHADOWING:

You may want a direct report to build knowledge/skill by shadowing a more experienced individual. To capture this in a direct report's IDP, simply open the corresponding IDP objective and note the shadowing plan in the objective's "Description" box. Later, you can add details in the "Completion" box on how it was fulfilled (following earlier steps 1-6).

INDEPENDENT STUDY OF PRINTED, VIDEO, OR ONLINE RESOURCES:

You may want a direct report to review written or digital materials at his/her own pace (e.g., reading sections of the Field Guide to Child Welfare). To record this in an IDP, simply open the corresponding IDP objective and note the independent study/research plan in the objective's "Description" box. Later, you can add details in the "Completion" box on how it was fulfilled (following earlier steps 1-6).

COACHING:

Coaching is a very effective way for individuals to master specific skills. To initiate a coaching intervention for your direct report, contact your Regional Training Center (RTC). If your RTC agrees that coaching is appropriate, you can record the details of the coaching plan in the appropriate objective's "Description" box in that individual's IDP (following steps 1-6 above). Later, you can add details in the "Completion" box on how the coaching plan was fulfilled (following earlier steps 1-6).

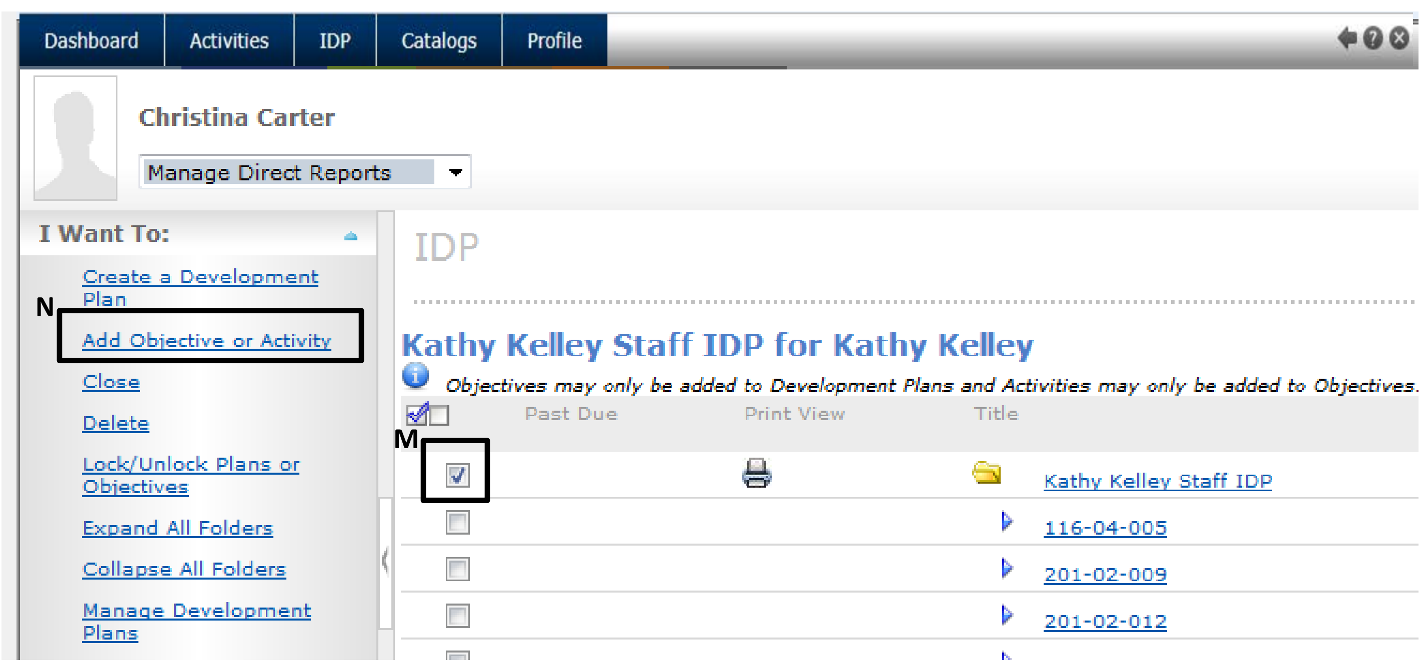
CLOSE AN OBJECTIVE IN A DIRECT REPORT'S IDP:

12. When a direct report's knowledge/skill development need has been met, it is important to close the corresponding objective in his/her IDP. To do so, follow steps 1-4 above to locate and expand the individual's IDP.
13. Check the box to the left of the objective you wish to close (K), click on "Close" in the left-side menu (L), then click "Close" a second time in the left-side menu of the resulting screen, and "OK" when prompted:

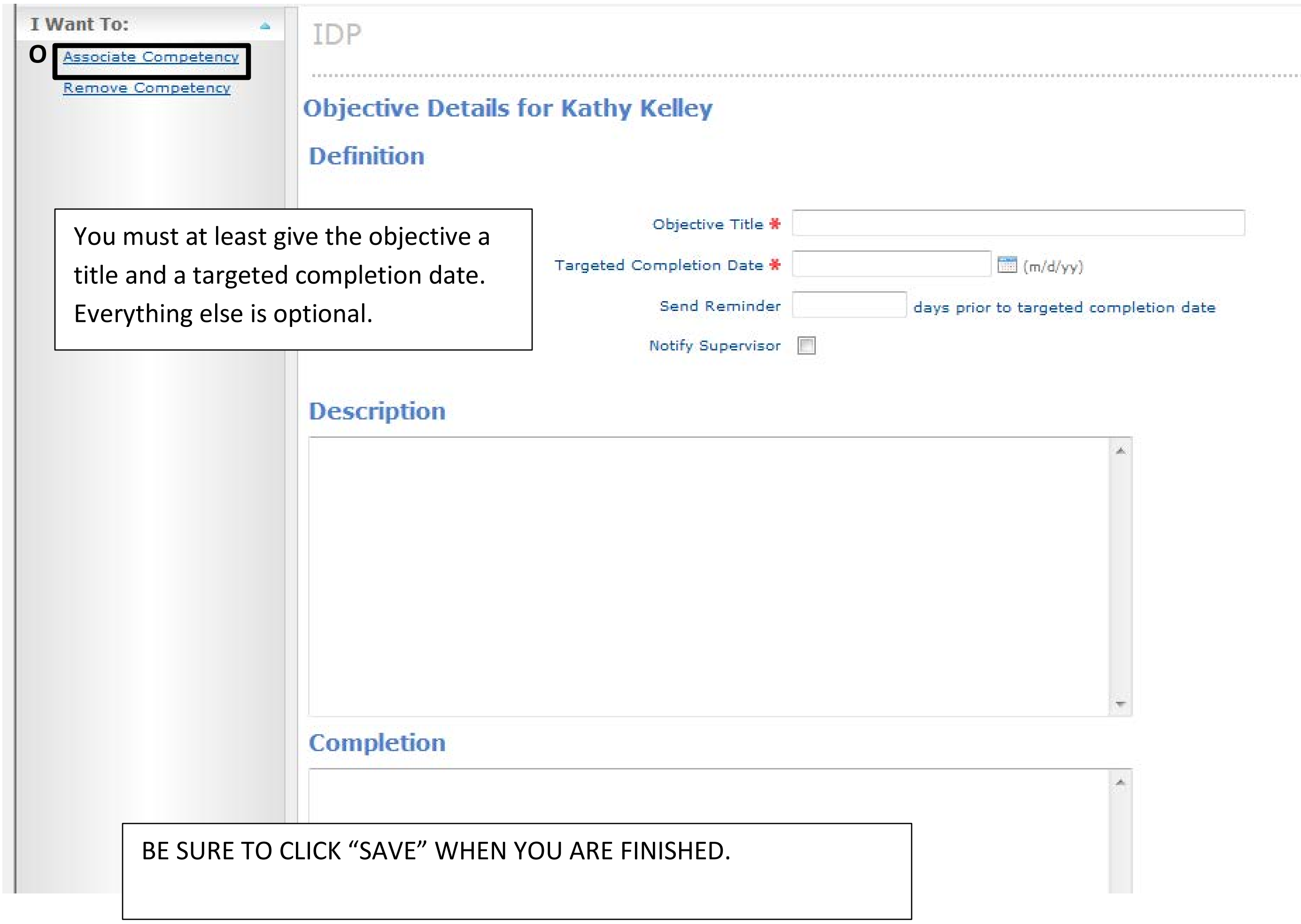
ADD A NEW OBJECTIVE TO AN IDP:

Occasionally you may wish to add a new objective to an existing IDP to address a newly emerging agency or county initiative or a newly detected need for worker knowledge/skill development.

14. Follow previous steps 1-3 to locate the individual's IDP.
15. Check the box to the left of the underlined IDP title (M) and click "Add Objective or Activity" from the left-side menu (N).



16. **OPTIONAL:** If the new objective is associated with a specific competency, on the resulting screen click "Associate Competency" (O) from the left-side menu. On the resulting screen, you will need to drill down (expand yellow folders) to the specific competency you wish to associate and click on the underlined title of that competency.
17. Complete the required detail fields and **SAVE** the objective:



18. **OPTIONAL:** Select the checkbox to the left of the objective and click "Lock/Unlock Plans or Objectives" from the left-side menu and "OK" when prompted. (This makes the individual objective's details read-only for the individual.)

REPORTS

Learning Completion Detail for Supervisor

From your Dashboard/Activities screen, after switching your login mode to Manage Direct Reports:

1. Click on the [Report] tab.
2. Click on Learning Completion Detail for Supervisor.
3. Assign report criteria:

- o **Primary Sort Options** (optional):
  - ❖ Sort Option 1: If desired, click in the field and select desired primary sort option.
- o **Secondary Sort Options** (optional):
  - ❖ Sort Option 1: If desired, click in the field and select desired option.
  - ❖ Sort Option 2: If desired, click in the field and select desired option.
- o **History Criteria** (optional)
  - ❖ First Completion Date: 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: 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.
- o **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.

    Or to see who has completed specific standardized sessions, such as Caseworker Core, Supervisor Core, or Assessor training, or online learning, type an 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
    - Distance Learning: %-DL%-%
  - ❖ Provider Organization Local Code: **LEAVE THIS FIELD BLANK**
- o **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 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.

- ❖ 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. You may be asked if you want to Open or Save the document. Select Open .
   Once open, you can save or print the report.

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

REPORTS (cont'd)

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/Activities tab, after switching your login mode to Manage Direct Reports:

1. Click on the [Reports] tab.
2. Click on Learning Not Completion 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 Completion Date
       Sort Option 2: Person Name
   - **History Criteria** (optional)
     - First Targeted 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 the x to remove the default date assignment.
     - Last Targeted Completion Date: Defaults to the current date. If desired, type or use the calendar icon to assign the last date in a date range; or click in the field then click the x to remove the default date assignment.

     Important note: If you want to include online learning events, you must clear the dates from the Targeted Completion Date fields.
   - **Learning Criteria** (optional)
     - Search for Learning: 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 Code, and Learning Revision fields.

       Or to see who has not yet completed specific standardized sessions, such as Caseworker Core, Supervisor Core, or Assessor training, or online learning, type an 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
       - Distance Learning: %-DL%-%
     - **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 to the left of OCWTP.
       - **c)** Click on the yellow folder to the left of Regional Training Centers.
       - d) Click on the yellow folder to the left of the Regional Training Center for your region.
       - e) Click on the yellow folder to the left of your desired population (i.e., Staff or Caregiver & Adoptive Parent).
       - f) Click on the yellow folder 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**. If desired, click in the drop-down field to select a different operator, such as **At and all levels below 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. You may be asked if you want to Open or Save the document. Select Open.
   Once open, you can save or print the report.

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

REPORTS (cont'd)

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.

REPORTS (cont'd)

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/Activities screen, after switching your login mode to Manage Trainees:

1. Click on the [Reports] 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 they asterisk (*) or percent (%) wildcard 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 an 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.
5. You may be asked if you want to Open or Save the document. Select Open.
   Once open, you can save or print the 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/Activities screen, after switching your login mode to Manage Trainees:

1. Click on the [Reports] 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** .
5. You may be asked if you want to Open or Save the document. Select Open .
   Once open, you can save or print the report.

REPORTS (cont'd)

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/Activities screen, after switching your login mode to Manage Trainees:

1. Click on the [Reports] 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.
5. You may be asked if you want to Open or Save the document. Select Open.
   Once open, you can save or print the report.

REPORTS (cont'd)

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/Activities screen, 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.
   - 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.
5. You may be asked if you want to Open or Save the document. Select Open.
   Once open, you can save or print the 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/Activities screen, after switching your login mode to Manage Trainees:

1. Click on the [Reports] 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** .
5. You may be asked if you want to Open or Save the document. Select Open .
   Once open, you can save or print the report.

REPORTS (cont'd)

PERFORMANCE PLAN SELF RATING COMPLETE
DO NOT USE - The OCWTP does not use this functionality.

REPORTS (cont'd)

RTC COMING DUE – DIRECT REPORT DRILLDOWN
DO NOT USE - The OCWTP does not use this functionality.

RTC PAST DUE – DIRECT REPORT DRILLDOWN
DO NOT USE - The OCWTP does not use this functionality.

REPORTS (cont'd)

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/Activities screen, after switching your login mode to Manage Trainees:

1. Click on the [Reports] 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.
5. You may be asked if you want to Open or Save the document. Select Open.
   Once open, you can save or print the report.

REPORTS (cont'd)

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/Activities screen, after switching your login mode to Manage Trainees:

1. Click on the [Reports] 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 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: 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 .
5. You may be asked if you want to Open or Save the document. Select Open .
   Once open, you can save or print the report.