

**Description:** In this guide, the user will learn how to use the Training Module, which is designed to help organizations track certification requirements and the status of employee and/or client compliance.

**Roles Required:** Super User

**Permissions Required:** Training Admin

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## Training Module Overview

The training module allows organizations to create **certification requirements**. Certification requirements are completely customizable and allow organizations to track employee and/or client training. Any type of training can be listed as a requirement. Examples might include first responder training, background checks, HIPAA acknowledgement, or driver’s license.

Certification requirements can be grouped into **certification templates**. Certification templates can be linked to various entities including service codes, funding accounts, cost centers, profiles (programs clients, or employees). To have an active service account for the linked entity, the employee or client must have completed all certifications in the template and the organization



must add the certification to the employee or client profile. Certification requirements can be used alone or in conjunction with certification templates.

There are many reporting and import options available for the training module. An additional feature of the module is the training player (LMS - learning management system) which allows courses to be taken on-demand.

The training module allows the organization to manage training compliance.

## Create Certification Requirements

1. Log in to DCI
2. Click **Settings** from the main menu
3. Click **Training** on the submenu
4. Click **Certification Requirements** on the flyout menu
5. Click **Actions**
6. Select **Add New Certification Requirement** from the actions drop-down
7. Complete the **Certification Requirement form wizard**
  - a. Requirement Name **(required)**: Create the Certification Requirement name
  - b. Target Profile Type **(required)**: Select Employee or Client
  - c. Requirement Description **(required)**: Additional information
  - d. Non Recurring Requirement **(required)**
    - i. Select **Yes** if the requirement is a one-time requirement and proceed to step h
    - ii. Select **No** if the requirement must be met more than once.
  - e. Custom Duration **(required)**
    - i. Select **Yes** if the requirement expiration differs based on the employee or client and needs to be manually entered (i.e., driver's license)
    - ii. Select **No** if the requirement expiration will be set based on the validation months field (i.e., annual CPR certification)
      1. **Valid Duration Months**: Number of months the requirement is valid
  - f. **Expiration Reminder Days (required)**: Number of days before expiration that reminders will be sent to the employee and/or supervisor
    - i. The system can generate reminder notifications if the "certification reached initial reminder deadline" message template is enabled
  - g. **Expiration Reminder Frequency (required)**: Frequency (in days) for reminders to be sent to the employee and/or supervisor. Final reminder will be indicated.
    - i. The system can generate reminder notifications if the "certification reached reminder deadline frequency" message template is enabled
  - h. **URL (optional)**: This link will be displayed in the training player (LMS - learning management system) allowing courses to be taken on-demand or linking the certification to an outside organization that offers training (i.e., Red Cross)

- i. **Course Reference** (optional): Required if using training player LMS provided by DCI
  - j. **Hire Grace Period (Days) (required)**: Amount of time an employee must complete the certification requirement after date of hire
  - k. **Status (required)**: Active. Select Inactive when no longer in use.
8. Click **Save** and **Yes** to confirm

## View and Edit Certification Requirements

1. Log in to DCI
2. Click **Settings** from the main menu
3. Click **Training** on the submenu
4. Click **Certification Requirements** on the flyout menu
5. Use the filters to search and select **Search**
6. Select the **Certification Requirement** to view or edit by clicking anywhere in row
  - a. The Certification Requirements Details page will open
7. Click **Actions**
8. Select **Edit Certification Requirement** from the actions drop-down
9. View and make edits in the **Edit Certification Requirement form wizard**
  - a. To deactivate the certification requirement, change status to **Inactive**
10. Click **Save** and **Yes** to confirm

## Create Certification Template

1. Log in to DCI
2. Click **Settings** from the main menu
3. Click **Training** on the submenu
4. Click **Certification Templates** on the flyout menu
5. Click **Actions**
6. Select **Add New Certification Template** from the actions drop-down
7. Complete the Add New Certification Template form wizard
  - a. **Template Name (required)**: Create the Template Name
  - b. **Template Description (required)**: Additional information
  - c. **Status (required)**: Active. Inactive when no longer in use.
8. Click **Save** and **Yes** to confirm

## Add or Remove Certification Requirements on the Certification Template

1. Login to DCI
2. Select **Settings** from the main menu
3. Select **Training** from the submenu
4. Click **Certification Template** from the flyout menu
5. Search and select the **template** to add or remove requirements
6. The Certification Template Detail page will open



7. Click **Actions**
8. Select **Add/Remove Certification Requirement** from the actions drop-down
  - a. Complete the **Add/Remove Certification Requirement form wizard**
    - i. Use the search field or scroll through the **Available** table to locate requirements
    - ii. Select the **Requirements** in the Available table to add or in the Selected table to remove
      1. Use the right arrow > to add them to the selected table template
      2. Use the double right arrow >> to add all existing certification requirements to the selected table template
      3. Use the left arrow < to remove selected requirements from the template
      4. Use the double left arrow << to remove all requirements from the template
9. Click **Save** and **Yes** to confirm

## View or Edit Certification Template

1. Login to DCI
2. Select **Settings** from the main menu
3. Select **Training** from the submenu
4. Click **Certification Template** from the flyout menu
5. Search and select the **template** to add or remove requirements
6. The Certification Template Detail page will open
7. Click **Actions**
8. Select **Edit Certification Template** from the actions drop-down
  - a. Update the Edit Certification Template form wizard
9. Click **Save** and **Yes** to confirm

## Link Certification Templates

Certification templates need to be linked to objects that require those certifications. They can be linked to the following objects - service codes, funding accounts, cost centers, profiles (programs clients, or employees). When linking, link to the highest level possible.

For example, link all new hire trainings and program specific training to a cost center. All driver training could be linked to the employee profile that provides transportation services.

Below is the hierarchy of linking certification templates from highest to lowest:

- Cost Center - all employees/clients in one cost center
- Service Code - all employees punching against the selected service code and/or all clients with that service code

- Master Program Account (profile) - all employees working in the program or group service and/or all clients with the program or group service
- Client Profile - all employees with any service accounts for the client
- Funding Account - all employees with a specific service account for the client (i.e., hourly service)
- Employee Profile – training specific to the individual employee

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **Training** on the submenu
4. Click **Certification Templates** on the flyout menu
5. Use the filters to search for the Certification Template and select **Search**
6. Select the Certification Template by clicking **anywhere in the row**
7. Click **Actions**
8. Select one of the following:
  - a. Add/Remove Service Code
  - b. Add/Remove Accounts (includes master program account and funding account)
  - c. Add/Remove Cost Center
  - d. Add/Remove Profiles (includes client profile and employee profile)
9. In the Add/Remove selector, choose the **object** to add to or remove from the certification template by using the search field or scrolling through the objects.
  - a. Use the right arrow > to add the object
  - b. Use the double right arrow >> to add all objects
  - c. Use the left arrow < to remove an object
  - d. Use the double left arrow << to remove all objects
10. Click **Save** and **Yes** to confirmation

## Add Profile Certifications to Employee or Client

Users with Super User or Supervisor Role or Employee Admin Permission can add Profile Certifications.

### Add a Profile Certification for an Employee

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter employee name in the Type Employee Name filter and click **Search**
5. **Click anywhere in the employee row** to open the employee details page
6. Click **Actions**
7. Select **Add Certification** from the drop-down menu to open the form wizard
8. Select the certification from the drop-down menu. All certification requirements currently in the system will populate.



9. Enter the date that the certification was obtained
10. Expiration date
  - a. Automatically populates based on the certification requirement duration
  - b. Custom duration certification requirements – Must enter the expiration date
11. Click **Save** and **Yes** to confirm

The certification has now been added to the employee profile and is listed in the certifications table. Certification date, expiration date, and the date that expiration reminders will start being sent is visible. Click anywhere in the certification row to open the details page.

## Add a copy of the Training Certificate

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter employee name in the Type Employee Name filter and click **Search**
5. **Click anywhere in the employee row** to open the employee details page
6. Scroll down and click the **Certifications** tab
7. **Click the selected certification** to open the details page
8. Click **Actions**
9. Select **New Attachment** from the drop-down menu
10. Enter a name for the attachment, upload the file then click **Save** and **Yes** to confirm

Attachments are visible on the Attachments tab below details widget.

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

## Renew a Certification for an Employee

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter employee name in the Type Employee Name filter and click **Search**
5. **Click anywhere in the employee row** to open the employee details page
6. Scroll down and click the **Certifications** tab
7. **Click the selected certification** to open the details page
8. Click **Actions**
9. Select **Renew Certification** from the drop-down menu
10. Enter the new date the certification was earned in the Certification Date field
11. Click **Renew** and **Yes** to confirm

The renewed certification displays as an active, separate certification from the original, renewed certification, which now has a status of expired.

## Online Training (Training Player)

Online training allows employees and clients to have access to complete certification requirements. Online training within DCI can be linked to an external site, i.e., Red Cross, organizations' learning management system (LMS) or hosted in DCI via the training player (LMS within DCI). For training to be displayed in the online training widget, the URL field must be completed in the certification requirement. To use the training player, both the fields URL and course reference must be completed. The Online training widget is located on the dashboard below the overtime gauge, total hours, and expiring certifications widgets.

The training player allows for knowledge checks to be included in courses. Using the training player to host online training allows the system to automatically create profile certifications when courses are completed. It can also add certification documentation (PDF certificate) to the employee/client profile certification.

The training player features the following options for organizations:

- Provide training courses to be uploaded
- Purchase DCI created courses
- Request DCI to produce custom training courses

### View Online Training

1. Log in to DCI
2. Scroll down the dashboard to the online training widget (below overtime gauge, total hours, and expiring certifications widgets)

## Reports

There are numerous training module reports that provide a quick and easy way to view all certification requirements, templates, and associations.

To view reports:

3. Log in to DCI
4. Click the **Reports** on the main menu
5. Hover over the **Training Reports** submenu tab to view available reports on the **flyout menu**
6. Select a report
7. Enter desired criteria into the filters (i.e., filter by time frame, specific client, employee, service code, cost center, etc.) and click **Search**
8. The records will display in the table below the filters
9. Click **Download** to select columns and download format

## Import

These tasks can also be completed using the import function. If a large quantity of requirements, templates, and associations need to be created, refer to Import documentation in the Help Center.

