



Staff Training

AWARDS INSTRUCTION SHEET

The AWARDS Staff Training feature enables you to schedule and maintain staff training session records, as well as to view read-only staff training reports for programs or individuals. This functionality can be accessed from a variety of locations in AWARDS based on your permissions:

- **From within the Human Resources module** – To access Staff Training from the Human Resources module, you must have the “Display Executive Administration Buttons” and “Staff Training Data Entry” permissions, as well as one of the three “Human Resources Data” permissions.
- **From within the Services module** – To access Staff Training from the Services module, you must have the “Display Any Chard Records Buttons” and “Display Chart Records Services Button” data entry/access permissions. Additionally, unless you are in an “Executive” user group you must have the “Staff Training Data Entry” permission.
- **From the AWARDS Opening Menu page** – Staff Training is available on the AWARDS *Opening Menu* page to users with the “Staff Training Data Entry” and “Display Executive Administration Buttons” permissions who do NOT have access to the Human Resources module.
- **From within the Calendar** – The Calendar is available to all AWARDS users with employee logins (with the exception of those whose access is limited by the “Restrict to Aggregate Data View” permission). Users can work with Staff Trainings in the Calendar as long as they have the “Staff Training Data Entry” permission.

IMPORTANT! *The instructions in the pages that follow assume access to Staff Training from at least one of the first three locations listed above. Working with staff training records from within the Calendar requires a few additional steps not discussed here. For more information on using the Calendar to work with staff training records, please see AWARDS Online Help or the “Calendar” Instruction Sheet accessible in the AWARDS Online Training System.*

ABOUT THIS DOCUMENT

This document is intended to guide you through the process of completing common Staff Training data entry and report viewing tasks. Specific topics covered are:

- **Scheduling a Staff Training** – Learn how to schedule a staff training step-by-step. Page 1
 - **Making Changes to a Scheduled Training** – Learn to reschedule trainings and enter attendance info. Page 3
 - **Viewing a Staff Training Report** – Learn to view a read-only report of staff training information. Page 5
 - **Frequently Asked Questions** – Learn the answers to common Staff Training questions. Page 6
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SCHEDULING A STAFF TRAINING

To schedule a staff training, complete the following steps:

1. From the Human Resources module, Services module, or AWARDS *Opening Menu* page, click **Staff Training**.

2. The *Staff Training Information* page is displayed. →

3. The date of the training being scheduled must fall within the date range on this page. Make changes to the default date range as necessary by overwriting the existing **Date Range** field values, or selecting new dates using the date pickers to the right of each field.
4. Click the **Staff in Programs** drop-down arrow and select the program or group of programs for which the training is being scheduled.
5. Confirm that the **Database** option is set to its default value – “Data Entry.”

6. Click **CONTINUE**. The *Staff Training Sessions* page is displayed. This page contains an option to add a new training record, and includes a list of any previously scheduled trainings for the date range and program specified on the previous page. →

7. Click the **ADD NEW SESSION** radio button.
8. Click **CONTINUE**. The *Staff Training Event Data Entry* page is displayed. →

9. By default, the training's date is set to today. If necessary, overwrite today's date in the **Date** field so that it accurately reflects the training date, or select the correct date using the date picker to the right of the field.
10. Use the **Start Time** and **End Time** drop-down selections to the right of the training date to indicate when the training is to begin and end.
11. By default a training's status is set to “Planned.” If you are entering a training that already took place, click the **Training Status** drop-down arrow and choose “Held.”
12. Click the **Location** drop-down arrow and choose the location at which the training is to take place. To specify a location not included on the list, select “Other Place,” and type the location name in the **Other** field.

The locations available for selection here are those that have been configured using the System Setup module, Agency Program Information, Configure Locations feature. For more information on configuring locations, please see AWARDS Online Help.

13. In the **Session Title** field, type the name of the training. Note that whatever you enter here will be used to identify the training on the Calendar and in the staff training index in data entry and report modes.

14. In the **Instructor** field, type the name of the individual leading the training. Note that the instructor's name will appear with the training when viewing it using the Calendar.
15. In the **Co-Instructor** field, type the name of the individual co-leading the training (if applicable).
16. Click the **In-House** drop-down arrow and choose "Yes" or "No" to indicate whether the training is being held in-house.
17. In the "Check Topics Covered in Training Session" portion of the page, click the check box next to each topic covered during the training. If a topic is not listed, check off "Other Topic" and enter the topic name in the corresponding field.
18. In the "Staff scheduled to attend this Training Session" portion of the page, click the **Scheduled** check box next to each individual who is to attend the training.

If a single program was selected in step 4, the training attendee selections are limited to staff with chart access to that program. If a specific program was not selected as part of the viewing options, all agency staff are available for selection.

If the training's status was set to "Held," also click the **Attendance Outcome** drop-down arrow (shown at right) for each attendee and make a selection to indicate whether he or she "Attended," was a "No Show," or was "Excused." (These outcome options are not available when the training's status is "Planned.")

19. In the **Comments** text box type any notes or comments regarding the training.
20. Click **UPDATE**. The training is scheduled, a confirmation page of training details is displayed, and a "TRAINING SESSION SCHEDULED" internal notification message is automatically sent to the training's attendees.

*If the training's start time is "off hours," meaning that it is outside of the hours of 6:00 am to 11:00pm, you will be asked to confirm that the time is correct before the training is scheduled. If so, click **CONFIRM**. If not, click **Jump Back** to correct the time.*

The process of scheduling a staff training is now complete.

MAKING CHANGES TO A SCHEDULED STAFF TRAINING

Using the Staff Training feature in data entry mode, users can not only schedule trainings as detailed in the previous section of this document, they can also change a training's status to "Held" and enter attendance detail for it, reschedule a training, make other updates such as altering the attendees list or location, cancel a training, or even delete it. To complete any one of these data entry tasks, complete the following steps:

1. From the Human Resources module, Services module, or AWARDS Opening Menu page, click **Staff Training**.
2. The *Staff Training Information* page is displayed. ➔
3. The date of the existing training record to be worked with must fall within the date range on this page. Make changes to the default date range as necessary by overwriting the existing **Date Range** field values, or selecting new dates using the date pickers to the right of each field.

4. Click the **Staff in Programs** drop-down arrow and select the program or group of programs for which the training was previously scheduled.
5. Confirm that the **Database** option is set to its default value – “Data Entry.”

6. Click **CONTINUE**. The *Staff Training Sessions* page is displayed. This page contains a list of any previously scheduled trainings for the date range and program specified on the previous page. →

7. Click the **Select** radio button next to the training session record to be worked with.
8. Click **CONTINUE**. The *Staff Training Event Data Entry* page is displayed. →
9. At this time, complete one or more of the following data entry tasks as needed:

- **Reschedule the training or update the training session details** - To do so, add to or alter the information in the fields and options on this page as necessary. When all changes have been made, click **UPDATE**. The training record is saved and a confirmation page is displayed. If the changes are relevant for an attendee to be aware of (for example, the date, time, or location changed) an internal notification message is automatically sent to them with the specifics of those changes. Similarly, if any staff members were added to or removed from the attendees list, they will receive a notification message as well.
- **Record the training as “Held” and enter attendance information** - To do so, click the **Training Status** drop-down arrow and select “Held.” The page is automatically refreshed and an attendance outcome column is added to the attendee selection table as shown here. →

Click the **Attendance Outcome** drop-down arrow next to each person scheduled to attend the training, and select “Attended,” “No Show,” or “Excused” to reflect their actual attendance. Make other updates to the training record as necessary, and then click **UPDATE**. The attendance information and any other changes to the record are saved and displayed on a confirmation page.

- **Cancel the training** - To do so, click the **Training Status** drop-down arrow, select “Cancelled,” and then click **UPDATE**. The *Confirm Staff Training Cancellation* page is displayed. Click **CONFIRM CANCELLATION** to proceed with the cancellation (otherwise click **Jump Back** to return to the previous page). The training is cancelled and a pop-up is displayed letting you know that the cancellation process is complete. Click **OK**. An internal notification message is automatically sent to any staff impacted by the cancellation.
- **Delete the training record** - To do so, click **Delete**. →

The Delete button is only available when the status of the training is set to something other than “Held,” and when no attendance outcomes information has been entered for the training.

The *Deletion of Staff Training* page is displayed. Click **CONFIRM DELETION** to proceed with the deletion (otherwise click **Jump Back** to return to the previous page). The training is deleted and a pop-up is

displayed letting you know the deletion process is complete. Click **OK**. An internal notification message is automatically sent to any staff impacted by the deletion.

The process of making changes to a scheduled staff training is now complete.

VIEWING A STAFF TRAINING REPORT

To view a read-only report of staff training information, complete the following steps:

1. From the Human Resources module, Services module, or *AWARDS Opening Menu* page, click **Staff Training**.
2. The *Staff Training Information* page is displayed. ➔
3. The date of the trainings to included in the report selection process must fall within the date range on this page. Make changes to the default date range as necessary by overwriting the existing **Date Range** field values, or selecting new dates using the date pickers to the right of each field.
4. Click the **Staff in Programs** drop-down arrow and select the program or group of programs for which the report is to be viewed.
5. Click the **Database** drop-down arrow and select "Reports."
6. Click **CONTINUE**. The *Staff Training Sessions* page is displayed. This page lists all trainings for the date range and program specified on the previous page.

7. If the report is to be viewed for a single training session, click the **Select** radio button for that session.

If the report is to be viewed for more than one training session, click the **Select** radio button for "SHOW ALL SESSIONS for" and configure the corresponding filters as necessary:

- **All Staff** – To include only those trainings attended by a specific staff member, click this drop-down arrow and select the individual in question. The default value is "All Staff."
- **All Statuses** – To include only those trainings with a specific status ("Planned," "Held," or "Cancelled") click this drop-down arrow and select that status. The default value is "All Statuses."
- **All Locations** – To include only those trainings set for a specific location, click this drop-down arrow and select that location. The default value is "All Locations."

- **All Titles** – To include only those trainings with a specific title, click this drop-down arrow and select that title. The default value is “All Titles.”
 - **All Instructors** – To include only those trainings conducted by a specific instructor, click this drop-down arrow and select that instructor. The default value is “All Instructors.”
 - **All Topics** – To include only those trainings given on a specific topic, click this drop-down arrow and select that topic. The default value is “All Topics.”
8. If the report contents should be limited to staff in the program(s) selected on the previous page (when viewing the report for a specific session), and/or to the individual staff member selected using the “All Staff” filter in the previous step (when viewing all sessions), click the **Limit Attendees List to Filters** check box.
 9. Click **CONTINUE**. The training report is displayed on the *Training Session Records* page. The contents of this read-only report include details for the training(s) meeting the selection criteria specified on the previous page, as well as summary information for those trainings.

*To export the report information to Microsoft Excel for further review and analysis, click the **Excel File** link at the top of the page.*

The process of viewing a staff training report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the Staff Training feature can be a useful reference when you have your own questions about the functionality.

HOW DO I RUN A STAFF TRAINING REPORT FOR AN INDIVIDUAL EMPLOYEE WITHOUT INCLUDING THE OTHER ATTENDEES?

During the “Viewing a Staff Training Report” process described beginning on page 5, specify that the report should **SHOW ALL SESSIONS for** and select the employee in question (in step 7). Also be sure to check off the Limit Attendees List to Filters check box (in step 8).

WHAT DETERMINES WHICH LOCATIONS I SEE IN THE LOCATION SELECTION LIST?

The locations available for selection when scheduling or updating a staff training are those that have been configured using the System Setup module, Agency Program Information, Configure Locations feature. If that feature has been used to create agency-wide locations, they are always included in the Location drop-down lists. If you are scheduling a training for a specific program to which you have chart access, the locations list also includes any locations configured for that program. For more information on configuring locations, see AWARDS Online Help.

WHAT DETERMINES WHICH TRAINING RECORDS ARE DISPLAYED WHEN A REPORT IS RUN FOR A SPECIFIC PROGRAM?

When a specific program is selected during the process of viewing a training report, the system shows you any trainings that have attendees who can be identified as:

- Having a caseload in that program

- Having a work schedule entry for that program
- Being assigned as a program director or deputy for that program
- Having chart access to the program

As a result, the report results may include trainings not specifically entered for the selected program. (Keep in mind that training records do not “belong” to a program, and that the program selection is only used for convenience to limit the number of staff check boxes during the data entry process.)

WHY ARE FORMER STAFF SHOWING UP WHEN ENTERING STAFF TRAINING RECORDS?

In order to allow for backdated training data entry, staff members' names remain on the staff training attendee selection list for 240 days after their staff information records have been closed. After that period of time has passed, the terminated staff members drop off the list automatically.