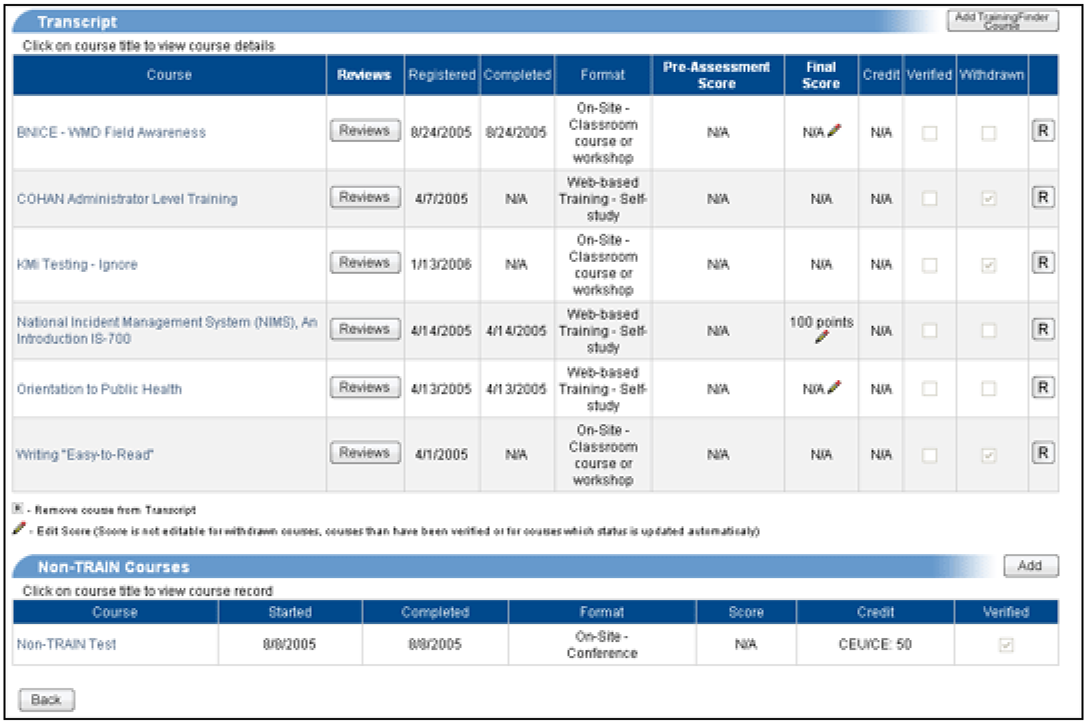
make distinguishing these courses easier, within the export, TRAIN and non-TRAIN courses are listed on different pages.



Transcript

Add TrainingFinder Course

Click on course title to view course details

Course	Reviews	Registered	Completed	Format	Pre-Assessment Score	Final Score	Credit	Verified	Withdrawn	
BNICE - WMD Field Awareness	Reviews	8/24/2005	8/24/2005	On-Site - Classroom course or workshop	N/A	N/A	N/A			R
COHAN Administrator Level Training	Reviews	4/7/2005	N/A	Web-based Training - Self-study	N/A	N/A	N/A		✓	R
KMI Testing - Ignore	Reviews	1/13/2006	N/A	On-Site - Classroom course or workshop	N/A	N/A	N/A		✓	R
National Incident Management System (NIMS), An Introduction IS-700	Reviews	4/14/2005	4/14/2005	Web-based Training - Self-study	N/A	100 points	N/A			R
Orientation to Public Health	Reviews	4/13/2005	4/13/2005	Web-based Training - Self-study	N/A	N/A	N/A			R
Writing "Easy-to-Read"	Reviews	4/1/2005	N/A	On-Site - Classroom course or workshop	N/A	N/A	N/A		✓	R

- Remove course from Transcript

- Edit Score (Score is not editable for withdrawn courses, courses than have been verified or for courses which status is updated automatically)

Non-TRAIN Courses

Add

Click on course title to view course record

Course	Started	Completed	Format	Score	Credit	Verified
Non-TRAIN Test	8/8/2005	8/8/2005	On-Site - Conference	N/A	CEU/CE: 50	✓

Back

For each TRAIN Course in your Transcript you are given the following information:

1. **Course Name**

   a. Click the Course Name to view the Course Information page

   b. If any Accreditations have been assigned to the course, they will be displayed here as well.

2. **Reviews**

   a. Click the **Reviews** button to enter a review and read other reviews.

3. **Registered**

   a. This is the date you registered for the course.

4. **Completed**

   a. This is the date you completed the course.

5. **Format**

   a. This is the format in which the course was presented.

6. **Pre-Assessment Score**

a. If the course required you to take a Pre-Assessment, your score will be displayed here.

b. To review your Pre-Assessment answers, click the **Status** link (Passed, Failed, or Pending).

7. **Final Score –or– Post-Assessment Score**

    a. If the course required you to take a Post-Assessment, your score will be displayed here.

    b. To review your Post-Assessment answers, click the **Status** link (Passed, Failed, or Pending).

8. **Credit**

    a. A Course Provider or Manager must verify your attendance once you have marked your course as completed. Once your attendance has been verified, the checkbox will be **Checked**.

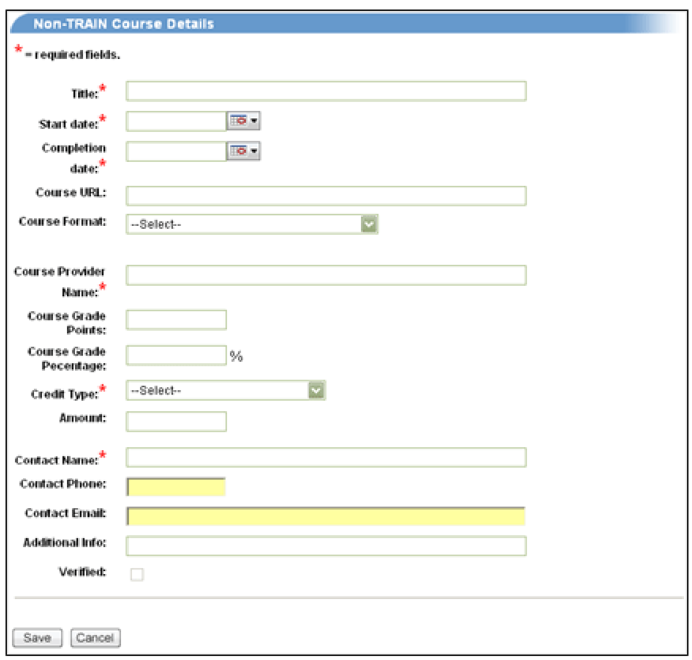
9. **Withdrawn**

    a. If you have Withdrawn from a course, it will still be displayed in your Transcript with a **Checked** checkbox in the Withdrawn column, and N/A for the Completion date.

Adding Non-TRAIN Courses

TRAIN allows you to enter course information on courses that you might have completed outside of TRAIN in order to help you better manage and keep track of your complete learning record. In order to add a Non-TRAIN course to your Transcript:

1. Click the **Add** button to the right of the Non-TRAIN Courses header.
2. On the resulting page, fill in each field – remember, fields marked with a red asterisk (*) are **required**.
3. When you have finished entering the course information, click **Save**.
4. The course will now be displayed in your transcript under **Non-TRAIN Courses**.



Non-TRAIN Course Information

5. Non-TRAIN courses must still be verified by an Administrator. Once an Administrator has verified the information, you will not be able to make changes to the entry.

Adding TrainingFinder Courses you Have Already Completed

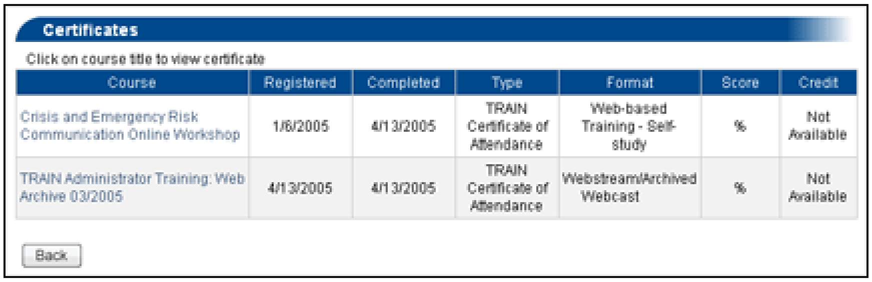
If there is a course within TrainingFinder that you have completed, you are able to add the course to your Transcript. In order to add a TrainingFinder course to your Transcript:

1. Click the **Add TrainingFinder Course** button to the right of the **Transcript** header.
2. Select the Course Name from the list of courses in the **TrainingFinder Course** dropdown and click **Next**.
3. Enter your **Completion Date** and your **Completion Score** (if applicable) in either points or percentage.
4. Click **Finish**.
5. The course will now be displayed in your Transcript along with any other TRAIN Courses you have registered for; however, it must also be verified by an Administrator.

Note: If you need to register for a course that is not listed within TRAIN or the TrainingFinder, use the **Add** feature to the right of the Non-TRAIN Courses header on the "Transcript" page.

"Certificates"

Some courses on TRAIN offer Certificates upon completion or verified completion of the course. Any certificate you earn through TRAIN will be stored in your Certificates page. Certificates have now been adjusted to include two different types, automatic and manual. Automatic certificates will appear on your certificate page as soon as the course is completed. Manual certificates will not appear on your certificate page until after the appropriate TRAIN administrator has verified your completion of the course. If you have any questions about what kind of certificate any given course might have, please contact the course provider or listed course contact.



Certificates

Click on course title to view certificate

Course	Registered	Completed	Type	Format	Score	Credit
Crisis and Emergency Risk Communication Online Workshop	1/6/2005	4/13/2005	TRAIN Certificate of Attendance	Web-based Training - Self-study	%	Not Available
TRAIN Administrator Training: Web Archive 03/2005	4/13/2005	4/13/2005	TRAIN Certificate of Attendance	Webstream/Archived Webcast	%	Not Available

Back

To view a certificate, simply click the Course Title. The Certificates list also provides you with the following course information:

1. **Registered**: the day you registered for the course

2. **Completed**: the day you completed the course.
3. **Type**: the type of certificate earned.
4. **Format**: the format in which the course was presented.
5. **Score**: your score, if applicable.
6. **Credit**: any earned credits by completing the course.

“Course Archive”

Your Course Archives is a repository for any courses that you have chosen to stop taking or courses that you have requested registration for and had your registration request declined.

If you wish to re-activate any course you have chosen to archive, simply click the **Resume** button and it will be moved back into your My Learning.

“My Account”

All of your personal account information is accessible through your My Account pages. You are able to modify and update your account settings at any time.

Updating your Personal Information:

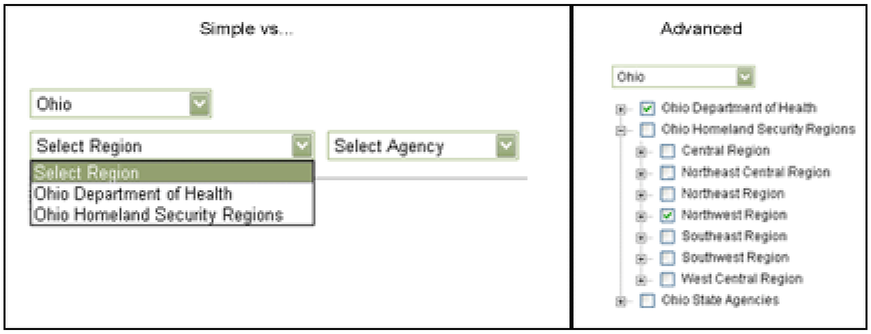
1. Click **My Account**.
2. You will be presented with your My Account information, with your personal information being contained on the **Details** tab.
3. Edit or update any text field. Here is also where you are able to modify or update your password questions and answers, as well as subscribe and unsubscribe to the Site Updates e-mail.
4. When you have finished your changes, click **Save**.

Updating your Group Assignment:

If at any point you need to change your group assignment, or add additional group assignments, simply:

1. Click **My Account**.
2. Click the **Groups** tab.
3. Your current grouping assignment will be displayed in **bold**. To edit your assignment (for example, you have moved, change positions, etc.) click the **Edit** button at the top of the page.
4. TRAIN will guide you through the process of selecting your new group assignment. The first step is to select your state. Once your state is chosen, click **Next** and TRAIN will then allow you to select from the state groups in either Simple or Advanced mode.

5. In **Simple** mode select an option from each presented drop-down menu. Some drop-down lists will require you to make a selection, while others will allow you to continue without making a selection. **Do not** place yourself into group where you do not belong. Make your group selections carefully.



6. In **Advanced** mode use the Grouping Tree to view your state's grouping structure. Click any '+' icon to open a grouping level to view the subgroups of that level. Place a check in the checkbox of any group to be assigned to that group.

   a. If you select multiple groups of the same category, you will have to choose which group is your primary group. This choice will be presented automatically upon login or account creation. The system is designed to provide only the necessary groups for primary selection. If you have questions about which groups is your primary group, please contact you state administrator; primary group information can be changed at any time.

7. Click **Next** to continue.

8. **MRC as an Affiliate**: The Medical Reserve Corps has joined the TRAIN community as a national affiliate. Members of the Medical Reserve Corps can belong to a State-Affiliate TRAIN site as well as the MRC TRAIN site (www.mrc.train.org). TRAIN will now ask you if you are a member of the Medical Reserve Corps. If so, check "Yes" and TRAIN will present a list of approved units within your state. Select the appropriate unit and click **Next** to continue.

   a. **If you are not a member of the MRC leave "No" selected and choose next**.

   b. **If you are editing your MRC account this page will instead ask you if you also belong to a State Affiliate**. **If so choose "Yes" and TRAIN will guide you through the process of selecting a state-group.**

   c. **If you do not see your MRC Unit within the drop-down list you will need to contact the head of MRC-TRAIN in order to get it approved. The head of MRC-TRAIN is Sam Schaffzin (Samuel.Schaffzin@hhs.gov).**

9. The final step in editing your groups is to click **Finish and Save**. You can also click **Back** to make changes to your selection or click **Cancel** to cancel all of your selections.

Updating your “My Profile”

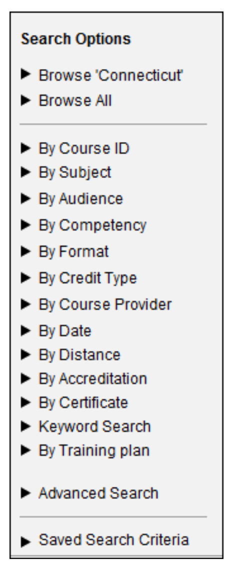
If, at any point in time, you wish to add, modify or remove certain aspects of your user profile, simply:

1. Click **My Accoun**t.
2. Click the **My Profile** tab.
3. By default, you will be presented with the list of **Professional Role** attributes. To select another list of user attributes (including Work Settings and Demographic information), simply select the category from the User Attributes Category drop-down menu. The screen will refresh automatically.
    a. If you select multiple professional roles of the same category, you will have to choose which professional role is your primary role. This choice will be presented automatically upon login or account creation. The system is designed to provide only the necessary professional roles for primary selection. If you have questions about which role is your primary professional role, please contact you state administrator; primary professional role information can be changed at any time.
4. Make any updates or changes needed, and click **Save and Back** to finalize your changes.

Surveys

TRAIN now has surveys available for end users. More information is available on surveys in the ‘TRAIN surveys’ section.

How to Search for Courses



Search Options List Menu

1. Click on the **Course Search** tab, located in the **Navigation Tab** bar.
2. On the resulting page, select the appropriate criteria for your search from the menu that appears on the left hand side of the page, or select **Search** or **Browse** by clicking the appropriate icon in the body of the page.
3. Next, either select your search variables from the list or enter your search query in the field provided. You may select multiple variables by holding down the Control key while making your selection.
4. Depending on the search option chosen, you will be asked to input various forms of search criteria. Once you have entered your search criteria, click **Search** and the screen will refresh with the search results

Note: If you belong to more than one state grouping, the "Browse My State" option will display courses belonging to all of your state groups.

How to Save Search Criteria

1. If you would like to save your search criteria in order to easily run the same search at a later date, simply click the **Save Criteria** button located next to the **Search** button at the bottom of various search option screens or at the top or bottom of the search results page.
2. You will then be prompted to give your search a name, and decide if you would like to be notified via e-mail when new courses that match your search criteria are entered into TRAIN.
3. To access your saved searches, simply click the **Saved Search Criteria** link at the bottom of the Search Options list.
4. To run the search again, click the name of the search criteria.
5. To edit the search criteria – which includes changing the name and the e-mail notification features – simply click the pencil icon next to the search name. Adjust the form as necessary, and click the disc icon to save your changes. Or click the strike-through pencil icon to cancel your changes.
6. To delete a search, simply click the blue 'x' icon next to search

Note: "Advanced Search" allows you to combine several criteria in one search. For your convenience, you can also save sets of criteria for future searches by clicking the appropriate button on the "Advanced Search" page.

How to Register for a Course

"Cost Associated" and "Credit Offered" Icons

1. Log on to your TRAIN site.
2. Locate your desired course either by using the method outlined in **How to Search for Courses** or by clicking on **Course Search**, followed by **Browse All** to look through the list of courses.
3. Each course displayed on the Course List page will provide the following information: the Title, the Course Provider who is offering the course, the Format in which the course is offered, any Reviews that have been entered by other users who have taken the course, and two icons that designate if the course has an associated cost and if any credit is offered upon course completion.
4. To get more information on any course displayed in the course list, simply click the **Title** of the course.

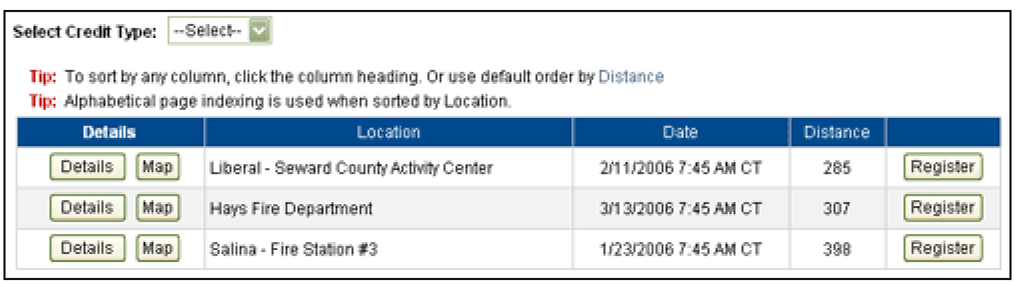
5. The Course Details screen will present you with four tabs: Course Details, Contacts, Registration, and Reviews.

6. **Course Details**: this tab will display all of the basic information about the course, including format, cost, description, target audience, skill level, and more.

7. **Contacts:** this tab will display Course Contact information. If you have any questions pertaining to the course, you will be provided with the name, phone, and e-mail of who best to contact in order to get your questions answered.

8. **Registration:** Depending on the course, you may be allowed to immediately register for or launch the course. However, it may be necessary to wait for approval from the course provider or administrator, or there may be payment or a supplemental registration procedure. In the event a course requires an additional step prior to completing registration, information about the requirement will be given on the registration tab and the **Register/Launch** button will be replaced by a **Go to step 2 of Registration** button (see example below). Clicking the **Step 2** button will guide you through any remaining requirements.

Courses may also have a number of **Sessions**. A **Session** is an offering of the course in its entirety.



In order to view the details of a particular session, simply click the **Details** button for the session. You will be presented with all information available for the session, including the seats available, the registration deadline, days the session takes place (i.e. a 'schedule') as well time and location of each schedule. Click **Back** to return to the Course Registration Tab

In order to register for a particular session, simply click the **Register** button for the desired session (or the **Step 2** button where required).

Waitlist Registration

Some courses on TRAIN offer Waitlist registration after the session has reached maximum capacity. To add yourself to the waitlist of a full session, simply click the Add to Waitlist button. The course will be added to your My Learning. If a seat opens up, everyone on the waitlist will be notified via e-mail. At that point you should go to the Course Management screen and register for the available seat, if it is still available. You will NOT be automatically enrolled.

Approval Codes

Some courses will require that an approval code be entered before registering for the course. The field for this information will appear under the Registration tab. If the course requires an approval code, but you do not have the code, you will then need to contact the listed course contact, the course provider or your state administrator.

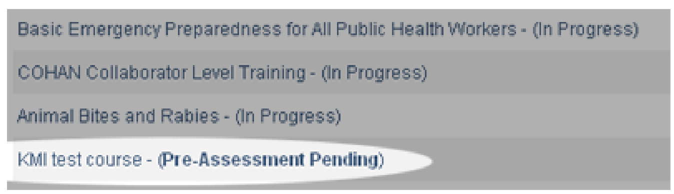
Registration codes will also be required when adding your name to a course waitlist.

How to Take Assessments and Evaluations

Taking Pre and Post Assessments

1. **Pre-Assessments:** Assessments are always mandatory. Therefore, when you register for a course that has a pre-assessment, you must complete the assessment before you are considered registered and **In Progress**.

2. There are a number of locations where you will be instructed to complete the Pre-Assessment:

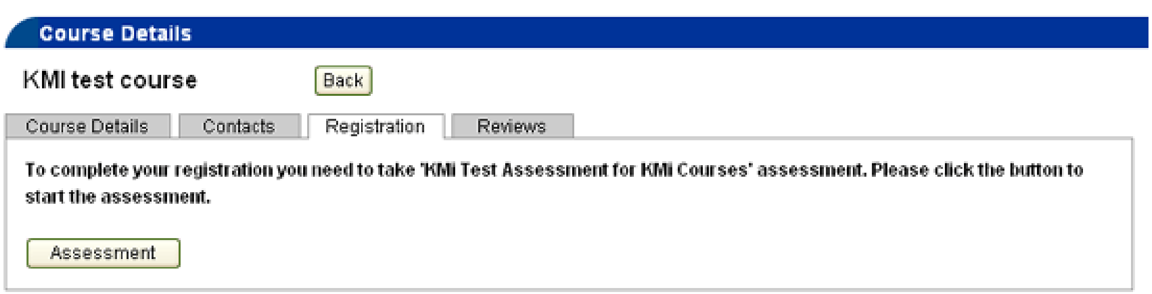


   a. On the course **Registration** tab.

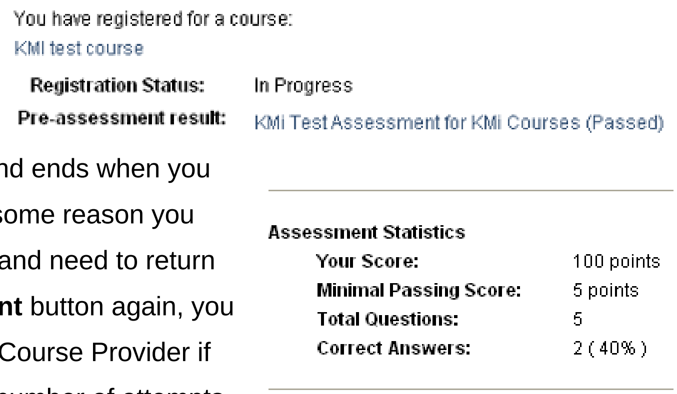
   b. In your **My Learning**.

   c. On the home page, above the **My Learning Record**.

3. In order to launch the Pre-Assessment, you must click the **Assessment** button, which is located both on the Registration tab and in the Course Registration Management. Once clicked, the Assessment will open in a new window. Click the **Start Assessment** button to begin the test.



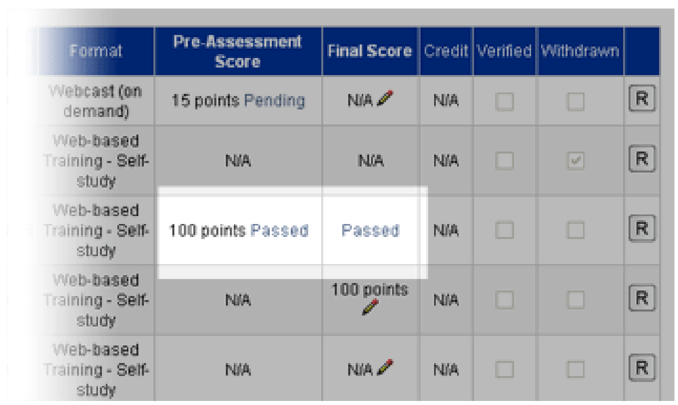
4. You have a limited number of attempts to complete the assessment. An attempt begins once you have clicked the **Start Assessment** button, and ends when you have answered the last question. If for some reason you are unable to complete the assessment and need to return to TRAIN and click the **Start Assessment** button again, you will begin your 2nd attempt. Contact the Course Provider if you have any questions concerning the number of attempts for your pre-assessment.



5. Certain Assessments will also place a time limit on the test. You will be able to complete the assessment if you exceed the time limit, but the Course Provider will take this into account when grading your Assessment.

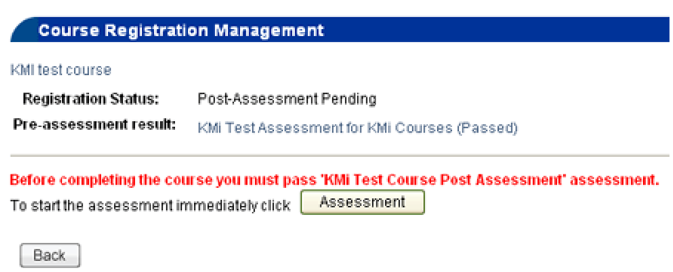
6. Answer each question to the best of your knowledge and click **Next** to proceed to the next question. Upon completion of the Assessment, you will be given a score if the assessment has a point value, or a **Pending** status. If you receive **Pending**, an Administrator will review your assessment and manually pass or fail you.

7. Once the Pre-Assessment has been completed, the registration is considered complete and your registration status is moved to **In Progress**.



8. If at any time you wish to review your Pre-Assessment test you can do so simply by going to the Course Management screen while the course is **In Progress**, or to the Transcript once the course has been **Completed**. On the Course Management screen, simply click the name of the Assessment to open and review. On the Transcript, click the **Status** name (pending, passed, or failed) to open and review.

1. **Post-Assessments:** Any Post-Assessment must be completed before the course status can be changed to **Completed** and the course moved to your Transcript.



Once you have gone to the Course Management screen and clicked **Complete** you will be prompted to take the Post-Assessment.

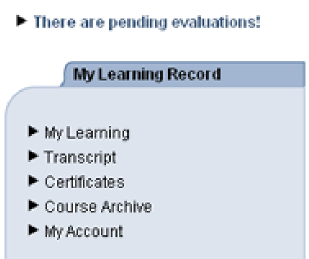
moved to **Completed**, and the course is moved into your **Transcript**.

8. If at any time you wish to review your Post-Assessment test you can do so simply by going to the Transcript once the course has been **Completed**. On the Transcript, click the **Status** name (pending, passed, or failed) to open and review.

Taking Evaluations

1. Evaluations are very similar to Assessments, but evaluations are not always mandatory.
2. For a mandatory Evaluation, you must complete the Evaluation before the course will be considered complete and moved into your **Transcript**.
3. There are a number of locations where you will be instructed to complete an Evaluation:

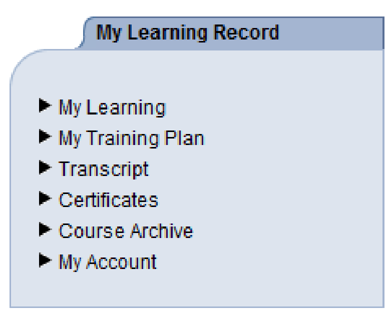
   a. On the Course Registration Tab.
   b. In your **My Learning**.
   c. On the home page, above the **My Learning Record**.



4. If an Evaluation is not mandatory, the course will be moved directly into your transcript. You will then be able to take the evaluation at any time by clicking the Evaluation name from your **Transcript**. You will also be reminded of the evaluation with the **Pending Evaluations** link on the home page.

How to Launch a Course for which you are already Registered

1. Log on to your TRAIN site.
2. From the Home page, click **My Learning** from the **My Learning Record** box located on the right hand side of the page.
3. On the resulting page, you will see a listing of all courses for which you are currently registered.
4. To launch a course, click on its title.



5. To change the status of any of the courses you are registered for, click the **M** icon next to a course title (see the **My Learning** section for more information).

Courses for which you are already registered

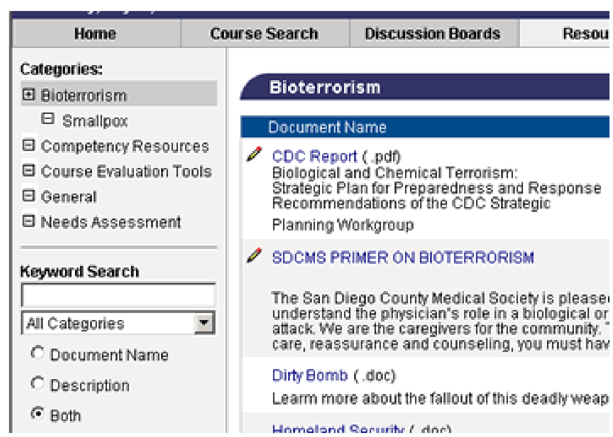
How to Post a Review of a Course

1. Log on to your TRAIN site.
2. Locate your desired course using the steps outlined in **How to Search for Courses** above. If you would like to review a course that you are currently enrolled in, you may do so from the **Transcript** page located in the **My Learning Record** box on the right hand side of the TRAIN homepage.
3. From the **Reviews** tab on the Course Details screen, click the **Add** button.
4. Fill out the form, including quality, rating, title, and comments.

Note: If you would like your review to be posted anonymously, simply uncheck the "Show my name on the review" box.

5. Click **Submit** to finish posting the review, or **Cancel** to go back without saving your entry.

How to Use the Resources Area



Resources Page

1. Log on to your TRAIN site.
2. Click the **Resources** tab, located in the Navigation Tab bar.
3. On the resulting page, you have several options:
   a. To locate a resource, choose from the categories listed in the menu on the left hand side of the page or use the **Search Documents by Keyword** function.
   b. To view a resource, click on the title of the document you wish to view.
   c. To add a resource:
      i. Click on the **Add Resource** button.

ii. On the resulting page, fill in the necessary information in the fields provided. If you wish to format your description using HTML coding, click the **HTML Mode** icon <>.

iii. To Upload a document, make sure the **Upload Document** button is selected. Then either type in the path of your document or click **Browse…** to pinpoint the document on your computer.

iv. To create a link to a website, make sure the **URL to Browse** button is selected and type the address of the website in the field provided.

v. Click **Save** to finish adding the resource.

TRAIN Surveys

You may find the option to participate in a survey on your TRAIN homepage. Surveys are not mandatory, and it is your choice if you wish to take and complete a survey.

The Survey Dashboard

The Survey Dashboard displays all surveys that are either newly available to you or those that require some sort of interaction on your part. If you wish to participate in a survey click the "Launch Survey" link. If you do not wish to participate, and want to remove it from your Dashboard, click the "Decline" link.

When a new survey becomes available in TRAIN, a popup alert window will notify you of the survey upon your next login. Once you acknowledge the new survey by closing the pop-up window you will not be notified again.

All surveys and related survey data can be more thoroughly reviewed and managed in the new "My Surveys" module within "My Learning Record."

My Surveys

Similar to My Learning, My Surveys contains all survey data related to your account. This includes surveys that are available for you to take, surveys that you have started taking but have not yet completed, completed surveys (saved for archival purposes), and other statuses.

By default when you enter My Surveys you will view "All" survey data. You can use the radio buttons at the top of the page to filter this list and more easily find specific surveys.

The following is a list of all available filtering options and exactly what type of surveys they will display:

1. **All** – every survey, regardless of its status.
2. **Available: Not Started** – these are surveys that are available for you to take, but that you have **not** launched or started. If you remove a survey from the dashboard and you later decide that you wish to take the survey, you can find that survey here (provided it is still available).
3. **In Progress** – these are surveys you have started but have not yet finished.
4. **Pending Review** – these are surveys that you have completed but are awaiting review from another TRAIN user (see the section **Surveys with Review** below for additional information).
5. **Reviewed** – these are surveys that **have** been reviewed by another user in TRAIN, and require you to view the results of each question (see the section **Surveys with Review** below for additional information).
6. **Completed** – these are surveys that have been completed, meaning every requirement has been met. For surveys that require a review, it means that both the review and your analysis of the

review have all been completed (see the section **Surveys with Review** below for additional information).

7. **To Review** – It is possible that another TRAIN user could select you to review their survey. If this happens, any survey that is awaiting **your review** can be found here (see the section **Surveys with Review** below for additional information).
8. **My Reviews** – If you have reviewed a survey in TRAIN, that survey is stored in the "My Surveys" module. This means that you can always return to a completed survey and review the submitted answers. All surveys that you have **reviewed for other users** can be found here (see the section **Surveys with Review** below for additional information).

In addition to the filtering options for display, the page will also display information related to each survey, tabled out in an easy-to-read format. For each survey you will see:

1. **"Print" –** no title is provided in this column, but you can click on the printer icon here to get a PDF document of the survey. **Note:** This option is only available if the survey manager has turned on the print function.
2. **Survey Name –** this will show you the name of the survey as defined by the survey manager.

   Note: This column will also display any "links" for interacting with the survey, such as "Launch Survey."
3. **Start Date –** this will display the day you began working on a survey. For surveys that you have not started the date column will show "N/A."
4. **Submitted Date –** this date is related only to surveys that require a peer review (see details in the section **Surveys with Review** below) and will display the date you submitted your survey results to TRAIN for review by another TRAIN user.
5. **Reviewed Date –** another date related to the review process, this date will display the date that the peer review was completed and returned to you.
6. **Submitted By –** when reviewing another user's survey, this will display the TRAIN User Name of the user who requested you for their review.
7. **Status –** this is the TRAIN Status for the survey, which corresponds to the filtering options defined above (In Progress, Not Started, Completed, etc.)

While the Dashboard is provided to you in order to make interaction with surveys easy and accessible, the My Survey module can be used for any action you might wish to take on a survey.

Taking a Survey

When you do choose to take a survey, click the “Launch Survey” link either in the Dashboard or “My Surveys” and TRAIN will launch the survey in new window.

Below are a list of *possible* options, features, and elements of surveys that you *could* experience in surveys offered through TRAIN. Note that some features may not be available depending on how the survey was set up.

1. **Introduction Page** – the first page of the survey will always show you some basic introductory text. This text will be different for every survey.
2. **User-Type Selection** – some surveys might ask you to make a selection that more accurately defines you as a “user.” If the second page directs you to make a User Type selection, the Survey Manager should provide on-screen information as to how they expect you to make your selection and/or why the selection has been added.
3. **Survey Section Navigation** – some surveys might offer you “quick links” to different sections within the survey. If this option is turned on, the third page of the survey will show you a list of all sections built into the survey. Click any section title to “jump” directly to that section
4. **Survey Section Title Page** – surveys that are organized into sections can also display a “title” page for each section. This page provides additional information *specific* to the questions within that section. This is not required, so it is possible to take a survey where no sections are defined.
5. **Navigation** – the following buttons each have a unique function within a survey. Remember, not every button is “turned on” for every survey:
    a. **“Navigation”** – If this is enabled, you will see this button at the top-left of the survey window. This button allows you to roll over and see a list of sections within the survey. Rolling down over the sections will expand to show you a list of the questions within the survey. If this feature is available, clicking on a Section Title or Question will take you directly to that page within the survey.
    b. **“Exit”** – this button will save your progress and leave the survey.
    c. **“Print” –** this button brings up a PDF document of the survey that can more easily be printed.
    d. **Help –** this button will open a document provided by the Survey Manager containing relevant help information
    e. **“?**” **Button** – the question mark here means that this button’s functionality, if turned on, is determined by the Survey Manager. It might be a button that says “Email Feedback” that

    links you to an email or another function. It is completely up to the Survey Manager what the button says and does.

    f. **“<<” button –** if you are taking a very long survey, and are allowed to “skip” from question to question, it can be hard to find questions you still need to complete. This button will take you to the “previous” unanswered question.

    g. **“<” button –** this button will take you back one page in the survey

    h. **“>” button –** this button will take you forward one page in the survey

    i. **“>>” button –** if you are taking a very long survey, and are allowed to “skip” from question to question, it can be hard to find questions you still need to complete. This button will take you to the “next” unanswered question.

6. **Other items to be aware of:**

    a. Some surveys will allow you to skip from question to question. Others might require you to answer every question in order.

    b. Some surveys allow you to submit incomplete results, while others do not. For surveys that require an answer on every question, automatic reminders will appear and will list all questions that were skipped. Clicking a question in this list will take you directly to that question.

Surveys with Review

TRAIN also has a unique type of survey that provides a peer-review experience for every TRAIN user that takes the survey. The basic steps for completing this type of Survey are as follows:

1. As a user you choose to participate. You click “Launch Survey,” answer every question, and submit your survey for review.

2. Once you have submitted your survey you **MUST** choose another user in TRAIN to review your survey. If you do not know another TRAIN user, that’s okay – many affiliates will provide a list of recommended or approved **Survey Reviewers** who can review your survey.

    a. Specific steps for this process are provided below, after this basic steps list.

3. Once you have chosen a reviewer, they will need to “Accept” your request and perform their review.

4. Once the reviewer has reviewed your survey and provided feedback, they will then return the survey to you.

5. You then need to open the survey, review their comments, and acknowledge that you have completely reviewed their comments.

6. Once all these steps have been finished, the survey is **Complete** and no further action is necessary.
7. A copy of the survey (read-only) remains in your "My Surveys" as a **Completed** survey AND in the selected reviewer's "My Surveys" as a survey under "My Reviews."

Selecting a Reviewer

1. Once you submit your initial survey results, the survey module will ask you if you want to select your reviewer right then or if you would like to wait and select a reviewer later.
2. If you choose to select a reviewer later, the survey will **remain in your Survey Dashboard until you have made a selection**. This is to help prevent surveys from getting forgotten and never getting reviewed.
3. Once you are ready to select a reviewer, click the "Select Reviewer" link under the survey title.
4. This will take you to a new page with a basic user search.
5. There are two option for finding another user:
    a. "**Search all Users**" – this allows you to search for any other account in TRAIN and ask the user to review your survey. In order to protect other TRAIN accounts, you can only search by the following fields:
        i. Last Name
        ii. First Name
        iii. Organization
        iv. Department
        v. State
    b. "**View Approved Survey Reviewers"** – as mentioned above, affiliates have the option of designating certain TRAIN users as approved or suggested **Survey Reviewers**. These individuals have been given a specific administrative role within TRAIN and should be expecting a larger number of requests to review other user's surveys.
6. To search for users, first select the radio button corresponding to the desired search option ("all" or "approved"), fill in any additional information you might know about the user you are looking for, and click the "Search" button.
7. The page will refresh and a list of all users matching your search parameters will be displayed.
8. To select a user, click the button next to the user's name and click "Select As Reviewer."

9. If you don't see the user you were looking for, alter your parameters and click the "Search" button again to refresh the list.
    a. You **must** however, select **someone** to review your survey. This is mandatory step for surveys that require a review.
10. If you have accidentally selected the wrong reviewer, or mistaken one TRAIN account for another, don't worry – that user will be able to **Decline** the request and return the survey back to you.
    a. A selected reviewer has the right to **decline** any request.
    b. If a survey is **declined** by your selected reviewer, you will be asked to select another reviewer to move your survey forward.

Reviewing a Survey

If you do **accept** the responsibility for reviewing another TRAIN user's survey you **must** take your role seriously and provide valuable feedback to the user in a timely manner. To perform your duties:

1. First click the "**Accept**" link within the Survey Dashboard to let the user know you agree to perform the review.
    a. As mentioned above, you have the option of clicking the "**Decline**" button and returning the survey to the user.
    b. If you are unsure who the user is, click on their TRAIN User Name under the Survey Title. This will display a limited list of user-details to protect user privacy. If you feel the user has selected you by mistake you can click the "**decline**" button and return the survey to the user.
2. Once accepted, click the "Review Survey" button to launch the survey in a new window.
3. Reviewing a survey consists of the same steps, interface, and options as mentioned above, with the following exceptions:
    a. The first page should display Introductory Text specific to you, the reviewer. This text is created for each survey by the Survey Manager, so it will be different for each survey. The point of emphasis here, however, is that the text here will be different from what the original user saw when taking the survey. Be sure to read the text carefully.
    b. Each question has to two "modes" of view. The first mode is labeled as "My Answer" – this is the question that **YOU** are to answer as the reviewer as you see fit for a "reply" to the user's original answer.

c. You can flip to see the user's original answer by changing the view mode to "Original Answer." Clicking this tab will flip the contents of the screen so you can see, in read-only mode, the user's original answer.

d. Based on the user's answer, their comments (if collected), and what you potentially know about the user, you are expected to answer the question as well.

e. Specific considerations, instructions, and expectations from the Survey Manager on this review process should be provided to you by the Survey Manager. If you have questions, look for contact information within the provided Help information.

f. At the end of the survey you will also have a page to submit a "Final Review," where you can summarize your thoughts and provide any insight or explanation as to how you answered the questions in the review.

g. The summation of your answers, comments, and final review should provide enough valuable feedback to the user to be considered an effective "Review." Again, the Survey Manager should provide you more specific instructions and explanation when taking the survey.

4. Once you have answered every question and entered your Final Review, click "Complete Review" to finalize your part in the review process. This returns the survey to the original user so they can review your submission.
5. TRAIN will always keep a copy of this survey in your "My Surveys," "My Reviews" section so that you can always look at surveys you previously reviewed for other users.

Looking at a "Reviewed" Survey

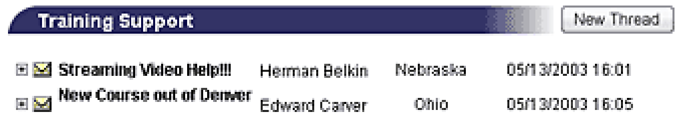
Once the selected reviewer has completed their review of your survey and submitted the feedback to TRAIN, the survey returns to your "Survey Dashboard," as well as "My Surveys," "Reviewed." You **must** open the survey and look at every page of the review to **complete** the survey.

1. To look over the review, click the "**Show Review Results"** link within the Survey Dashboard (or from within "My Surveys") to open the survey once more.
2. The first page of Introductory Text will now **be updated** with new content. This content is, again, up to the Survey Manager to define. They should provide you with some basic instructions or expectations on how to interpret the review.
3. Each question has to two "modes" of view. The first mode is labeled as "My Answer" – this is the question that **YOU** submitted when you first took the survey.

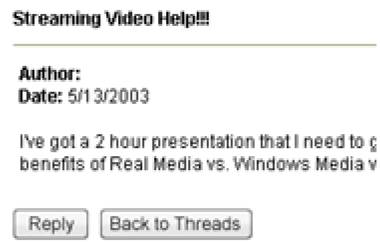
4. You can flip to see the reviewer's answer and/or comments by changing the view mode to "Reviewer's Answer." Clicking this tab will flip the contents of the screen so you can see, in read-only mode, the reviewer's response.
5. At the end of the survey you will be able to read the reviewer's "Final Review," which should be a summary of their thoughts, providing insight and/or explanation as to how they answered the questions through the review process.
    a. The summation of both your and the reviewer's answers, comments, and final review should provide enough valuable feedback to be considered an effective "Review". Again, the Survey Manager should provide you more specific instructions and explanation when taking the survey.
6. Once you have finished looking at every question and the Final Review, you can click "Complete Review" to finalize the review process.
7. TRAIN will always keep a copy of this survey in your "My Surveys," "Completed" section so that you can always look at surveys you previously completed through TRAIN.

How to Use the Discussion Boards

1. Log on to your TRAIN site.
2. Click the **Discussion Boards** tab, located in the **Navigation Tab** bar.
3. On the resulting page, you have several options:



Discussion Threads



Reading and Replying to Messages

   a. To view different **Discussion Topics**, choose from the list of topics available in the menu on the left hand side of the page.

   b. To view different **Discussion Topics**, choose from the list of topics available in the menu on the left hand side of the page.

   c. To view a reply to a message, click the '+' icon next to the thread title. Or, click the blue arrow located in the top right hand corner of the message while viewing the message. This allows you to move freely back and forth through the replies.

   d. To reply to a message:

      i. Click the **Reply** button while viewing the message.

      ii. On the resulting page, fill in the necessary information in the fields provided. If you wish to format your description using HTML coding, click the **HTML Mode** icon <>.

      iii. To upload a document, make sure the **Upload Document** button is selected. Then either type in the path of your document or click **Browse…** to pinpoint the document on your computer.

   e. To expand a discussion, click on the plus sign (+) next to the discussion thread. An expanded discussion thread will feature both the initial message and any replies.

   f. To create a new thread (or a new discussion), click on the **New Thread** button while viewing the discussion boards. Enter the necessary information and click **Submit** to post your message as a new thread.

   g. To go back to the main page of the discussion topic while viewing a message, click on the **Back to Threads** button.

Spotlight Links

On the Home page of TRAIN, you will notice various links under the heading of **Spotlight** to the upper-left of the screen. These links are provided to you by both PHF and your state TRAIN Administrator. If you have any questions about the links provided, contact either PHF or your state TRAIN Administrator.

Upcoming Events

Course Providers are able to display sessions for their courses in the **Upcoming Events** box, located just under your **My Learning Record**. Clicking the title of a course will take you directly to the Course Details page. This is a good way of finding upcoming courses that are available to you.

Event Calendar (Not Available to Every Affiliate)

Similar to **Upcoming Events**, the **Calendar** is a good way to get a quick overview of all publicly available upcoming sessions. This feature is available via the **Calendar** link in the TRAIN navigation bar. To access course and session information within the Calendar, simply click on the asset title in the calendar display.

This feature is not available to all affiliates at this time. If you have questions about the availability of the Calendar in your state, please contact your state administrator.

Users can now also print a list of courses for a given month. This icon is located above both the month and date views of the Calendar. Clicking the print icon will reveal a popup window in which the user can refine their date range using the standard date selection boxes. The print friendly calendar will not display as a calendar for printing purposes; rather, it will list the events by date.

How to Request the Role of Conference Presenter

TRAIN now offers a Conference feature. Conferences also allow for sessions and within each session, presenters can be assigned. If you would like your name and profile information to be available for assignment on Conference sessions, you will need to apply for the Conference Presenter Role (this role cannot be assigned, but rather, must be requested and then approved). To apply for the Conference Presenter role:

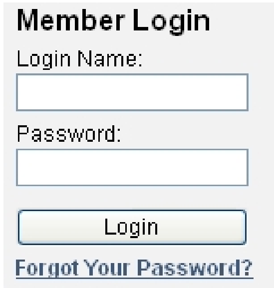
1. Log on to your TRAIN site.
2. Click **My Account** from the **My Learning Record** box located on the right hand side of the page.
3. Scroll to the bottom of the page and click on **Request to Become a Conference Presenter**.
4. A new form will open at the bottom of the page. Fill it in as completely as possible and click **Save**.
5. Your request will be reviewed by the Administrator in charge of Conference Presenter Approvals for your state. You will be informed of their decision via e-mail.

How to Request the Role of Course Provider

If you would like to post courses to the TRAIN website, simply:

1. Log on to your TRAIN site.
2. Click **My Account** from the **My Learning Record** box located on the right hand side of the page.
3. Scroll to the bottom of the page and click on **Request to Become a Course Provider**.
4. A new form will open at the bottom of the page. Fill it in as completely as possible and click **Save**.
5. Your request will be reviewed by the Administrator in charge of Course Provider Approvals for your state. You will be informed of their decision via e-mail.

What to Do if You Forget Your Password



Retrieving your Password

1. Go to your TRAIN Login page.
2. Click on the **Forgot your password?** link, below the **Login** button.
3. You will be asked to enter your login name and then answer the secret question which you previously established when registering with TRAIN.
4. Your password will be displayed to you on screen. It will *not* be e-mailed to you.
5. If you are unable to remember your login name or password answer follow the on-screen prompts. TRAIN will ask you other questions regarding the information in your account in order gain access to your password.
6. If you continue to have problems, contact your state TRAIN Administrator, or support@train.org.

Getting Support

Contacting Your State Administrator for Technical and Non-Technical Support

State-specific contact information can be found within TRAIN

- Login to TRAIN.
- Click the **Help** tab.
- Click **Contacts** in the left-hand navigation.
- Click Affiliate Contacts.
- Select the appropriate Contact based on the information provided.