

INSTRUCTIONS FOR EDUCATION AND TRAINING MODULE

Overview

The **Education and Training Tracking Module** allows the administrator the ability to create a list of education core modules. These modules can be assigned as a requirement for a particular contact type. The contact may be An Investigator, Board Member, or Coordinator. define Contact Type ie Investigator, Board Member etc). Upon completion of an education module, an individual's information can be entered. The **Education and Training Tracking Module** will then display a list of education modules that that individual has completed as well as the scheduled expiration date for each module. The administrator also has the ability to send reminder letters to an individual to notify the individual of certification expiration.

Functionality

The **Education and Training Tracking Module** can be accessed directly from the **Main Menu** or the from the "Administration" button located on the **Main Menu**.

Education Module Maintenance:

A single click of the "Education Module/Tracking" button, from the **Main Menu** will display a window with two selection buttons: "Module Maintenance" and "Prepare Reminders".

- **Module Maintenance:** A single click on this button will display the complete list of education core modules. A new module may be added to this list by clicking the "Add New Core Module" button. Any entry from this list may be edited, deleted, or assigned as a requirement for a particular contact type. Clicking the "Assign Module As Contact Type Requirement" button will display the selected module and available contact types. The selected module may then be added as a requirement for another contact type. A single click on the "Delete Core Module" button will permanently delete the selected module from the list of available core modules. Clicking the "Edit Core Module" and "Add New Core Module" buttons will display the **Edit Module** and **Add Module** windows, respectively. From each of these windows a module may be modified or added to the list. After selecting a module to edit, the **Edit Module** window displays information pertaining to the selected core module. All the fields on this window, except module name, may be modified. The **Add Module** window is identical to the **Edit Module** window. However, the module name must be entered and must not already exist. We need to expound on the modify.
- **Prepare Reminders:** A single click on this button will display the **Education Modules Due to Expire (I've since changed the form caption to Modules due to expire. We discussed how this works but be can discuss again. We need to explain how to use and what the various options due.** window. This window contains a list of modules due to expire by a selected date. A single click on one of the four options in the option box on this window allows different views of the module list. The first option will display a list of modules that are due to expire by the date selected. A date is selected by clicking on the calendar. The

default date selected is today's date. If the 'due to expire' date has been changed, a single click on the "Switch to Today" button will change the selected date back to today. The second option will display a list of modules that are due to expire by the selected date, but a reminder letter has already been sent. The third option will display a list of all modules that have already expired. The fourth option will display all modules on file regardless of expiration date. Also, reminder letters may be sent, from this window, to notify the selected individual that the selected module is due to (or already has) expired. The individual is selected from the displayed list and the "Send Reminder Letter(s)" button may be clicked. This will display a list of previously formatted reminder letters. After a letter is selected and opened, the **Letter Manager** window is displayed. The letter will already be pre-addressed to the contact. The **Letter Manager** window functions identically to the existing **Letter Manager**. The "Module Due to Expire Report" button displays ...(Under Development and will be available soon.).....

Education Tracking: A single click of the “Administration” button from the **Main Menu** will display the **Administration** window. A contact type may be selected. This will display a list of all the individuals on file. Selecting from this list will display the individual’s data. A single click on the “Education Training” button will display the **Education Training** window for the selected contact. This window contains a list of training modules for which the selected individual has been certified. The list also has the certification date, expiration date, and other important information regarding each module. The modules may be edited or deleted. If a module is deleted, it will be permanently removed from the individual’s file of modules taken.

Clicking the “Edit Module” button will display the **Edit Module** window. All the information on this window may be modified, including the module name. The “Change” button must be pressed before any modifications are saved. Pressing the “Return” button before the “Change” button will simply return to the **Education Training** window causes any changes to be lost.

The “Assign Module” button will display the **Education Core Module Maintenance** window. This window displays all the available modules for the selected contact type. An education module may be selected from this list and added to the selected individual’s module list by clicking the “Add Module to Selected Contact” button. A single click on this button will add the module to the selected individual’s list and return back to the **Education Core Module Maintenance** window. The “Show All Core Modules” button will simply display the entire list of available core modules.

The “Letter Manager” button will(this is not enabled yet)