



TECH TRAINING INSTRUCTIONAL USER MANUAL



TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER™
EL PASO

Office of Institutional Compliance

JANUARY 12, 2024

TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER EL PASO

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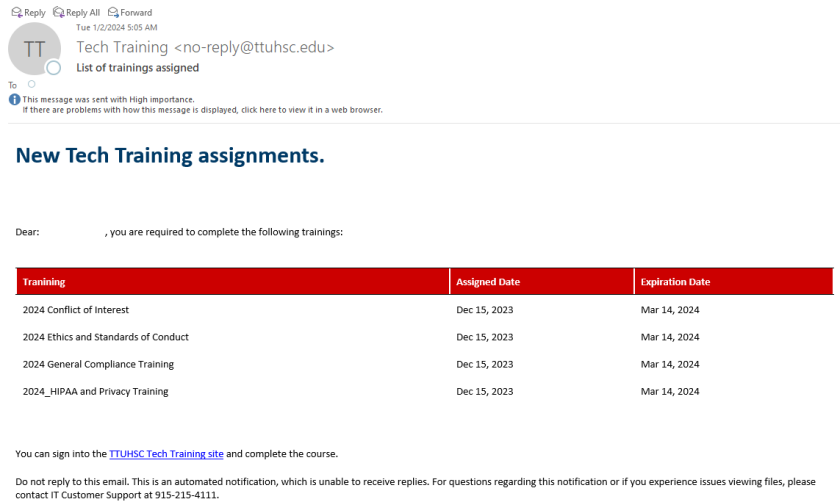
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USER ROLE – FUNCTIONS

MY ASSIGNED TRAININGS

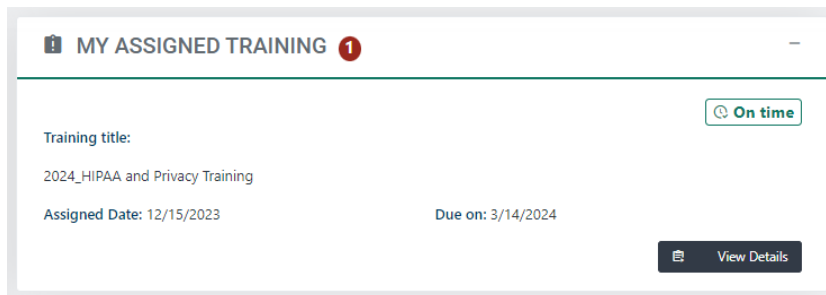
- 1) When a training course has been assigned to you, you will receive an email notification.




- 2) To access the training, click on the link provided in the email and log into **Tech Training** using your TTUHSC EP credentials or go to <https://academic.elpaso.ttuhscc.edu/TechTraining/>

You can sign into the [TTUHSC Tech Training site](#) and complete the course.

- 3) Once you log in, you will be able to see all trainings that have been assigned to you listed in the **My Assigned Training** section.



- 4) Click on the  button to go to the course.
- 5) Next, you will see the **Course Outline** and **Course Files** screen. To begin the course, download the **Course Files**.
 - a) When you are ready to take the exam, click on the **Start Exam** button.

Attempt 1 of 3
Course Outline

2023 Institutional Compliance HIPAA Privacy Training

The deadline to complete your HIPAA Privacy Training is 90 days from the date of assigned training. Note that quiz will need to be completed before leaving the course otherwise, you will need to start over. We encourage you to print the handouts to use for reference.
 Only after you view the required handout can you access the test to successfully complete the course. You must correctly answer 10 of the 12 questions to pass the test.

Course Files

File Notes:

- For those courses that require watching a video or downloading a handout we recommend using modern browsers (like Chrome, Firefox, Safari)
- Other patterns and browsers should work but you may experience issues viewing files
- If you experience issues viewing/downloading files, please contact IT Customer Support

File Name: 2023_CME HIPAA and Privacy Training

File Description:
2023_CME HIPAA and Privacy Training

[Download](#)

File Name: HIPAA_QuickTips

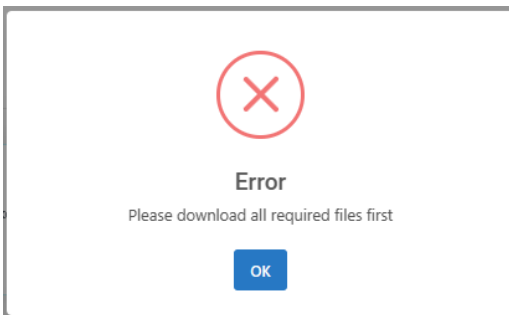
File Description:
HIPAA_QuickTips

[Download](#)

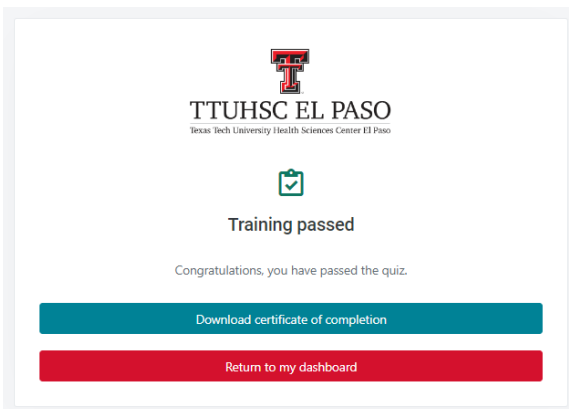
[Start Exam →](#)

[Return to Dashboard](#)

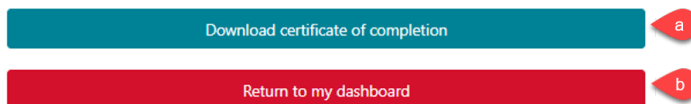
Note: If you do not download the course files that are required, you will see the following pop-up box and you will not be able to proceed to the exam portion.
Do not click on the back button of your browser when beginning an exam as it will count it as an attempt.



6) The following message will appear when you have successfully passed the exam.



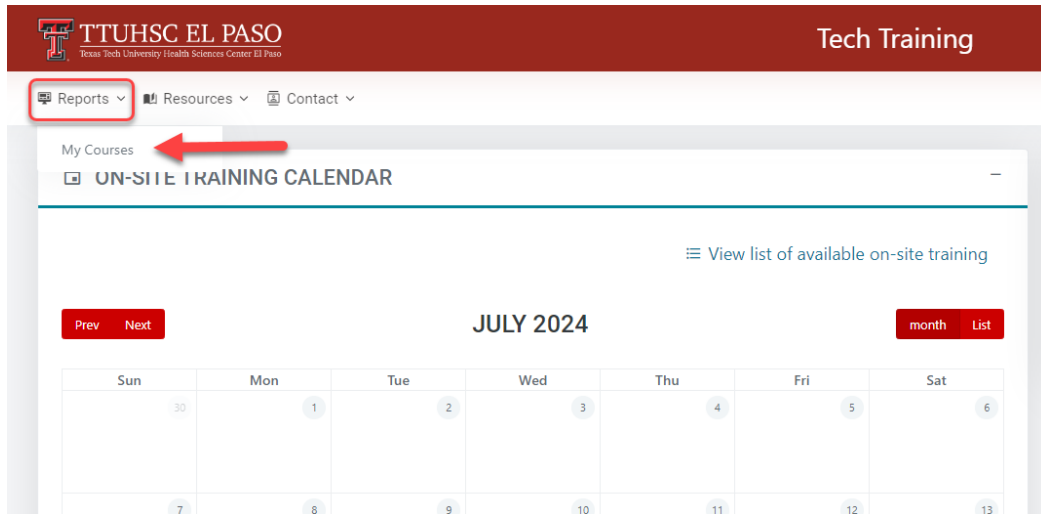
7) You will have the option to return to the **Dashboard** or print your certificate.



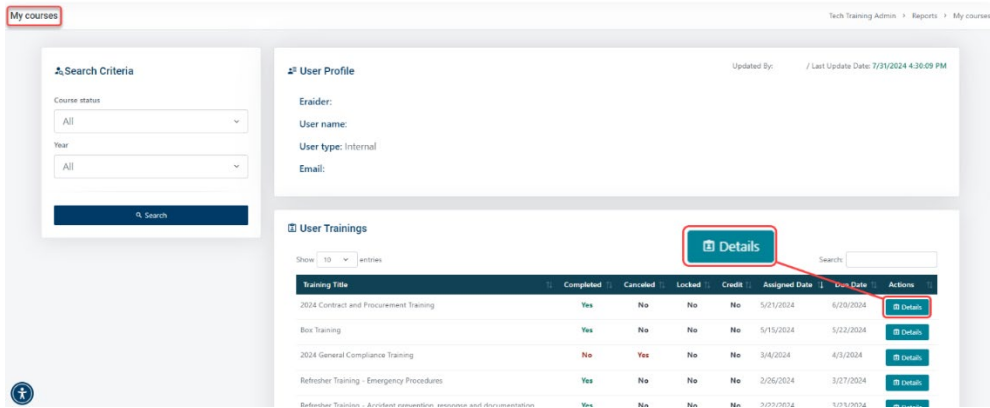
- a) If you choose the **Download a Certificate of Completion** option, you will receive a training certificate in PDF format. The certificate can be printed or saved on your computer.



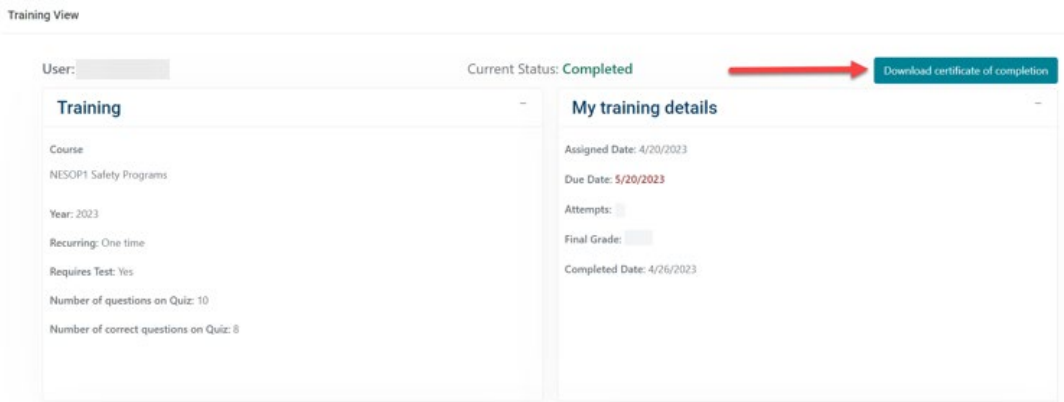
- 8) An alternate way to print the **Certificate of Completion** is by going under the **Reports** tab and clicking on **My Courses**.



- 9) This will take you to the **My courses** screen. Click on the **Details** button.



10) Next, you will see the following screen. Click on **Download certificate of completion**.



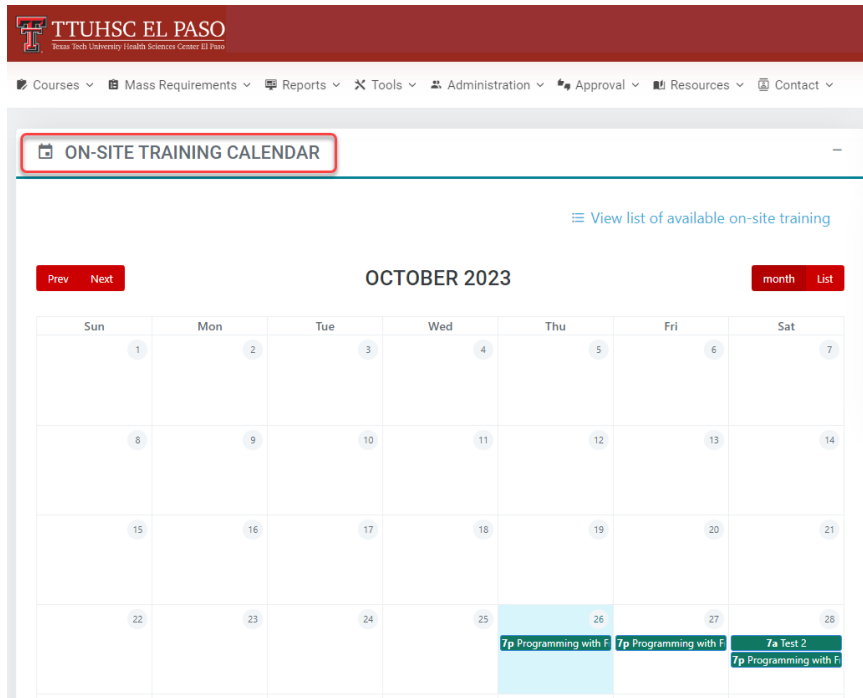
11) If you scroll down on this screen, you will see **My Exams** section. This will allow you to see information of all of the exams you have taken.

The screenshot shows the 'My Exams' section with a table of exam results.

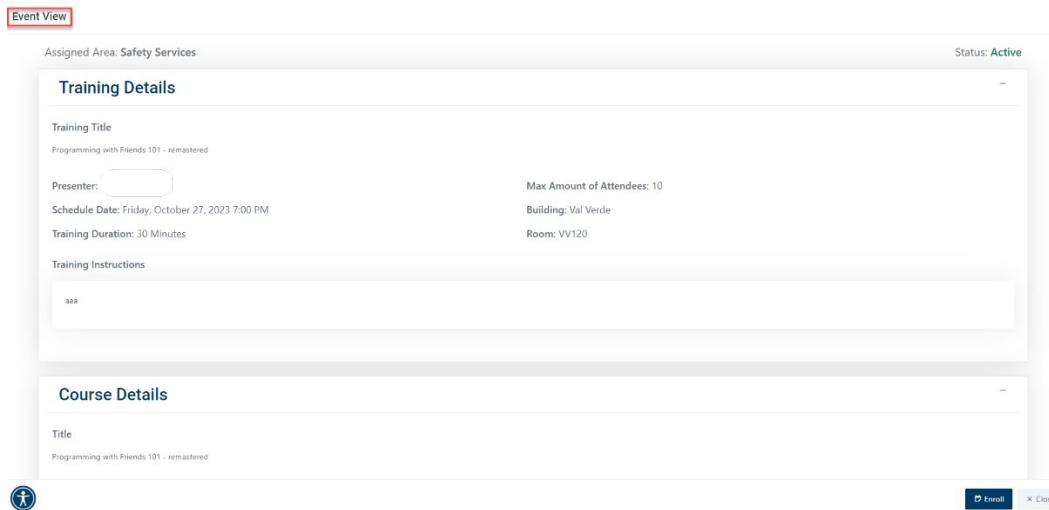
Start Date	Completed	Finish Later	Completed Date	Passed	Correct Answers	Grade
2023/04/26	Yes	No	4/26/2023	Yes		


ENROLLING IN AN ON-SITE COURSE

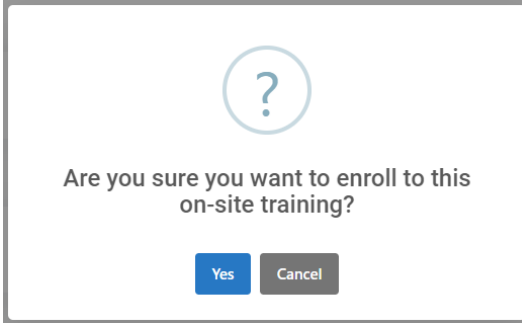
- 1) If you want to enroll in an On-Site course, go to the **On-Site Training Calendar**.



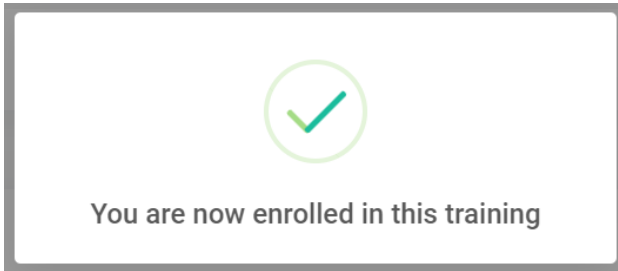
- a) Click on the name of the training you want to enroll in. This will take you to the **Event View** screen.



- b) Click on the  button to be added to the training session.
- c) A pop-up box will appear. Click **Cancel** to go back to the **On-Site Training Calendar** or click **Yes** to continue.



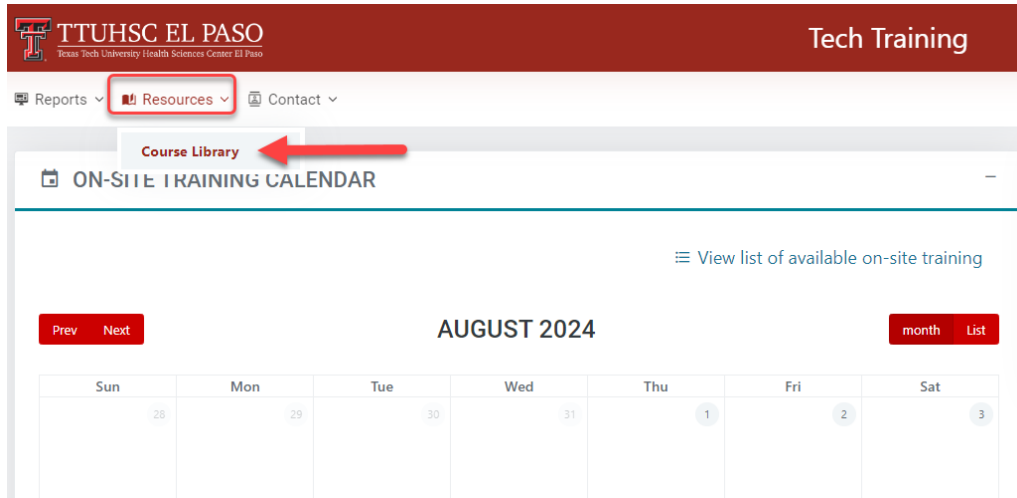
d) If you click **Yes**, a pop-up will appear confirming that you are enrolled in the training.



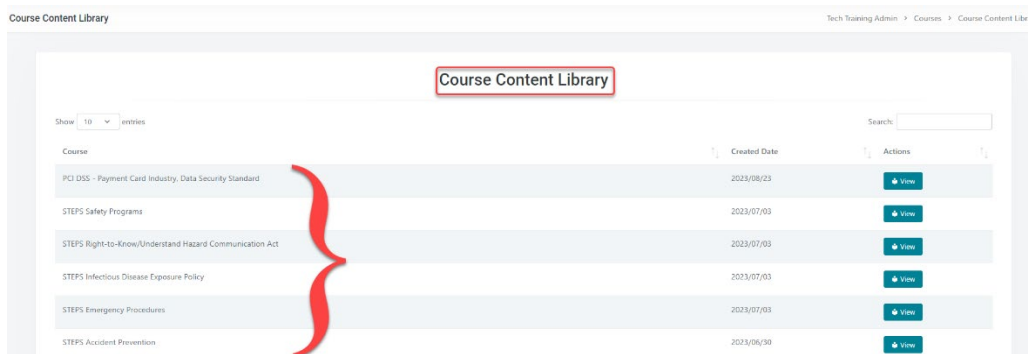
RESOURCES – COURSE LIBRARY

This function will allow the user to see and download the training content without having to retake the course.

- 1) To go to the **Course Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



- 2) This will take you to the **Course Content Library** screen. In this page, you will be able to see all the trainings that have been uploaded.



- a) Click on the [View](#) button to view the content for your desired training(s).

- 3) Next, you will see the **Course Content** page which allows you to see the details for that training.

- a) You can also download the **Course Files** for that course.

PCI DSS - Payment Card Industry, Data Security Standard

Course Details

Alternate Title

PCI DSS - Payment Card Industry, Data Security Standard

Course Description

This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.

Objectives

Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.

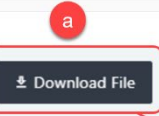
Outline

- What is PCI DSS?
- Third-Party Vendors
- PCI DSS Requirements
- Security Features
- Record Retention
- Processing Payment Cards
- Precautions
- Incident Response
- SAQ
- Taking Payments Over the Phone
- Policies and Procedures

Course Files

PCI DSS - Payment Card Industry, Data Security Standard

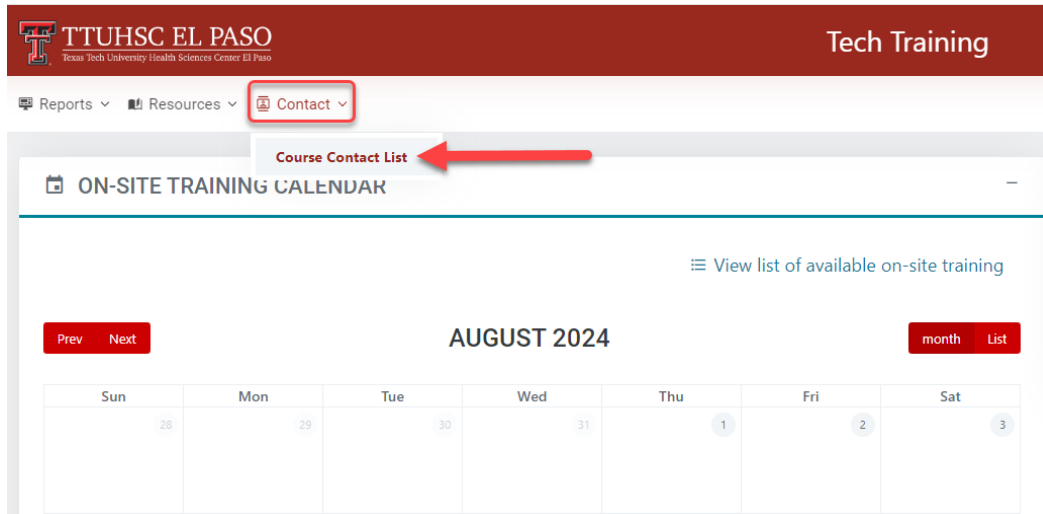
File Descriptions:
PowerPoint Presentation



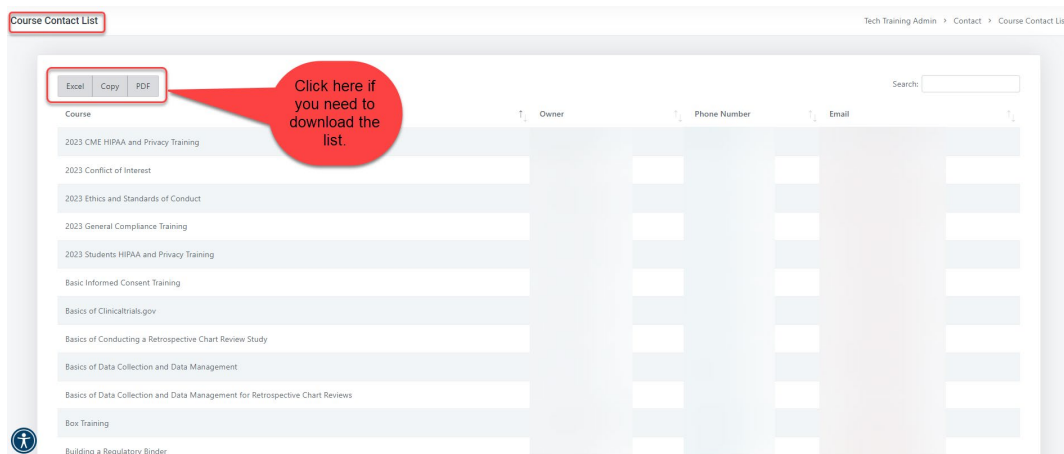
CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

- 1) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.



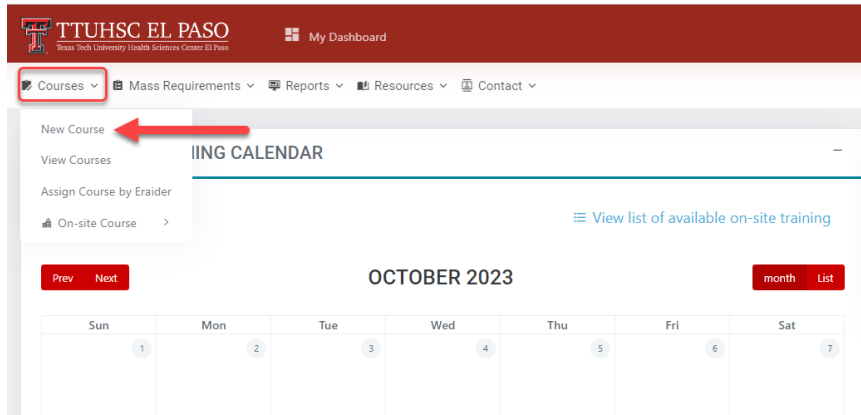
- 2) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number, and email.



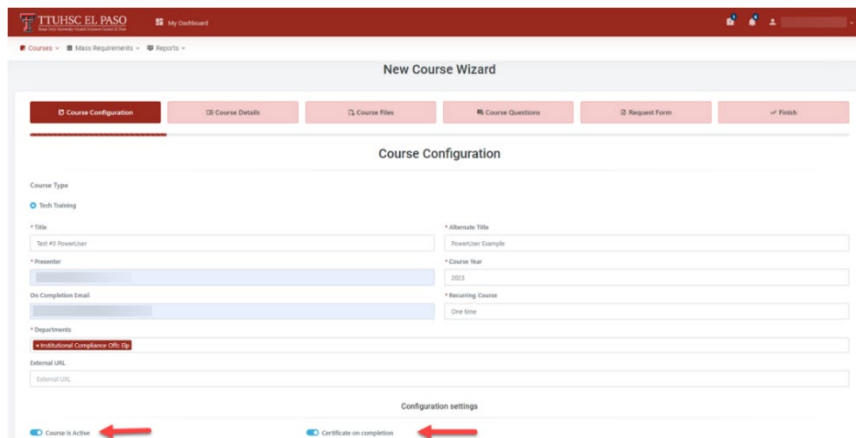
POWERUSER ROLE – FUNCTIONS

COURSES – NEW COURSE

- 1) To create a course, you can go to the **Courses** dropdown from left hand corner and click on **New Course**.



- 2) You will be directed to the **New Course Wizard** screen. This is the **Course Configuration** tab.
 - a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*)*.
 - Under **Departments**, your department name will be the only option available.
 - For **External URL**, use this only if course will have an external source attached. (For example, utilizing YouTube videos or external sites outside of TTUHSC EP website.)
 - b) Assure the **Course is Active** and **Certificate on Completion** toggle buttons under **Configuration settings** are **blue**. This will make them active.



- c) Once the information is completed, click on **Next step →** to proceed.

- 3) You will be directed to the **Course Details** tab below:
- Fill in the required fields. *Note: Required fields are identified by an asterisk (*)*.
 - Then click on [Next step →](#) to proceed.
 - Course Description** – this section will include a short description of the course.
 - Objectives** – this section will outline the goals for the user upon the completion of this course.
 - Outline** – enter a general description of the course content and instructions.
 - Lockout Message** – enter contact information of person that can unlock the training for user.

The screenshot displays the 'New Course Wizard' interface, specifically the 'Course Details' tab. The interface is divided into several sections, each with a rich text editor for input. The sections are: 'Course Description', 'Objectives', 'Outline', and 'Lockout message'. Each section has a toolbar with various formatting options like bold, italic, underline, text color, background color, bulleted list, numbered list, link, and unlink. A 'Next step →' button is located at the bottom right, and a 'Return' button is at the bottom left. The 'Course Details' tab is highlighted in the top navigation bar.

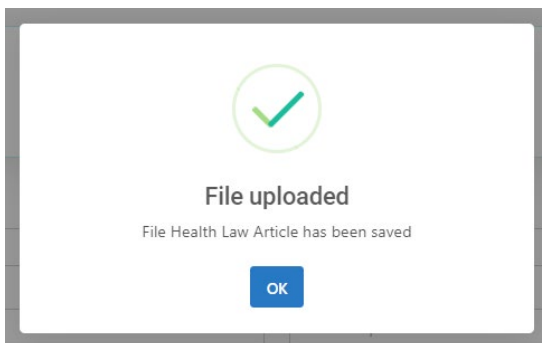
- 4) Under **Course Files** tab, you will be able to upload the desired files. There is no limit to the number of files you wish to upload.

- a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*
- b) Ensure the **Required** toggle button at the bottom left hand corner of the page is **blue**. This will make downloading the course files a requirement.

The screenshot shows the 'Course Files' section of a course management system. At the top, there is a navigation bar with tabs for 'Course Configuration', 'Course Details', 'Course Files' (selected), 'Course Questions', 'Request Form', and 'Finish'. Below this, a 'Course Files' header is present. A 'Course File Notes' box contains instructions: 'Files are optional, but if a file needs to be added all fields will be required' and 'Remember to click on Upload file to save it in the server.' The main form has a 'File' section with a 'Choose File' button and 'No file chosen' text. Below that are 'File Name' and 'File Description' fields, both marked with an asterisk (*). At the bottom left, a toggle switch for 'Requires file to be downloaded by user?' is set to 'Required' (blue). An 'Upload File' button is located at the bottom right.

5) Once the files have been uploaded, click **Upload Files**.

- a) A pop-up box will appear. Click **Ok**.



6) You may continue uploading additional files. If you are finished, click on **Next step →** to proceed.

7) You will be directed to **Course Questions** tab. This is a two-step process.

- a) First, answer **1. If a test is required**, check the **Requires test?** checkbox.

Course Questions

Course Question Notes:

- If the course requires a quiz please check **Requires test** and click **save and continue** in order to proceed to next step **Add questions**
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the **Number of questions** field

1- Test required **Requires test?**

2- Add Questions

*** Number Of Attempts**

*** Number Of Questions**

*** Number Of Correct Answers**

Configuration Settings

Random Questions

8) Next, you will need to fill in the following fields:

- Number of Attempts** – this field determines how many times the user is allowed to take the test before being locked out.
- Number of Questions** – this field will determine how many questions the user will receive each time the test is taken.
- The **Number of Correct Answers** – this field will determine the number of questions that must be answered correctly to pass the test.
- You will have the option to choose **Random Questions**. It is recommended that you select **Random Questions**, so that the user receives a new shuffled set of questions when retaking a test. If you don't choose **Random Questions**, the questions will appear in the same order each time the user initiates the test.

Course Question Notes:

- If the course requires a quiz please check **Requires test** and click **save and continue** in order to proceed to next step **Add questions**
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the **Number of questions** field

1- Test required **Requires test?**

2- Add Questions

*** Number Of Attempts** **a**

*** Number Of Questions** **b**

*** Number Of Correct Answers** **c**

Configuration Settings

Random Questions **d**

- 9) When the information has been entered in Step 1, click on **Save and continue** button at the bottom of the screen. Then click on **Next step →**.

Course Question Notes:

- If the course requires a quiz please check Requires test and click save and continue in order to proceed to next step Add questions
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the Number of questions field

1. Test required Requires Test?

2. Add Questions

* Number Of Attempts: 3

* Number Of Questions: 1

* Number Of Correct Answers: 1

Configuration Settings

Random Questions

Save and continue

Return

Next step →

- 10) Next, you will be directed to the **2.-Add Questions** step.

- a) Click on **Add New Question** button to start adding questions.

1.- Test required

2.- Add Questions

Questions Added


+ Add New Question


- 11) This will take you to the following steps. Fill out the **+ Add New Question** fields.

- a) **Answer Type** – There are two types of answers: single or multiple. Choose **single** if question only has one correct answer. Choose **multiple** if question has more than one correct answer.
- b) **Question** – The questions can be typed in, or you can cut and paste the questions from a word document. **DO NOT start a question with a number or a letter if you chose the Random Questions.**
- **Example: 1. Who is the President? or a. Who is the President?**
- c) **Objective** – This section may be left blank or you may add an objective. This is not a required field.
- d) **Media Content** – This section may be left blank if external URLs are not needed.

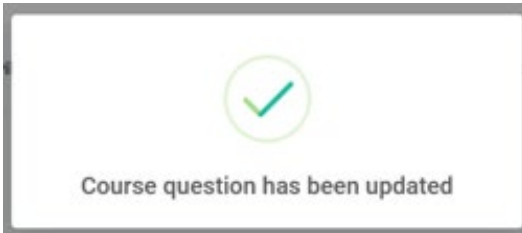
12) Next, go to the **Answer** section:

- a) Type the first possible answer in the **Answer** field (you can also cut and paste the answers from a word document). If this is the correct answer, make sure to click on the **Correct Answer check box**.
- b) If it is not the correct answer, click on the **+Add Answer box** to continue adding possible answers. **DO NOT start an answer with a number or a letter.**
 - Example: 1. True or a. True

13) Once you have entered all corresponding options for the questions, click on the  button on the bottom of your screen.

14) When you have successfully added the questions and answers and click on the  button, the following pop-up notification will appear:

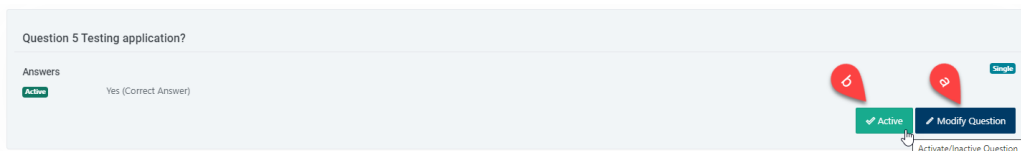
Note: You will start seeing the questions you added under the **Questions Added** section.



15) Repeat steps 10 - 14 to continue adding questions.

16) Verify that everything is correct before proceeding to the next step.

- a) If you need to make changes, click on **Modify Question**.
- b) You can **Activate/Inactivate** a question. For example, inactivate a question that was submitted in error or was a duplicate entry.



17) Once everything is correct, click on **Next step →** at the bottom of the page.

18) Next, you will be directed to the **Request Form** tab. This is the **Training Request Form** screen. All fields need to be filled in.

The screenshot shows the 'Training Request Form' interface. At the top, there is a navigation bar with 'Request Form' highlighted. Below the navigation bar, the form title 'Training Request Form' is centered. The form contains several sections of input fields:

- Submission Date:** 02/07/2023
- Requesting Department:** Requesting department
- Lesson Name:** Lesson Name
- Name Of Individual Submitting This Form:** Individual Name
- Lesson Duration (time it takes for learner to complete):** Lesson Duration
- Summation Of Lesson:** Summation of lesson
- Requirement For Training (TJC, state statute, department requirement, Provide citation if the requirement is a statute or TJC):** Requirement for training
- Target Department (All office workers, clinical staff, everyone, etc):** Target department
- Lesson Frequency (One time, annual, bi-annual, etc):** Lesson Duration
- Assignment Month:** 02/07/2023
- Approval from the individual in your chain of command that reports to the Dean or the President is required. Did you obtain their approval? Please list the name of this individual:** Approved by name

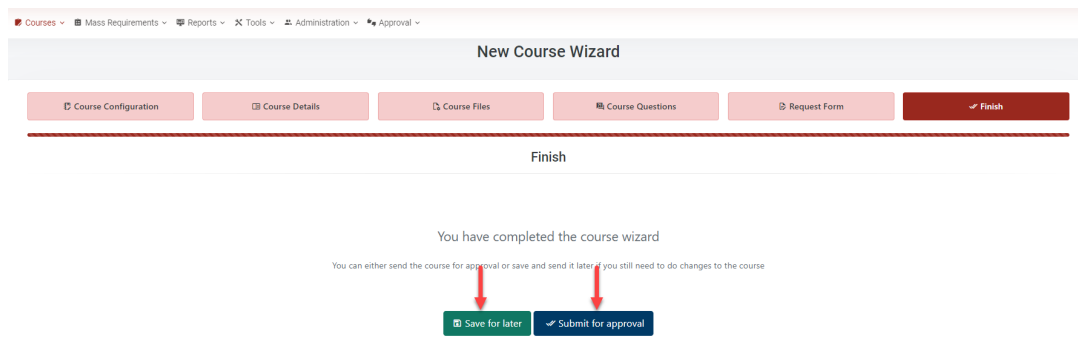
At the bottom left, there is a 'Return' button, and at the bottom right, there is a 'Next step →' button.

- **Submission Date** – Enter date when training is submitted.
- **Requesting Department** – Enter department that owns the training.
- **Lesson Name** – Enter full name of the course.
- **Name of Individual Submitting This Form** – Enter your full name and title.
- **Lesson Duration** – Time it takes for user to complete the training.
- **Summation of Lesson** – Enter brief summary of training.
- **Requirement for Training** – (TJC, state statute, department requirement). Provide Citation if the requirement is statute or TJC.
- **Target Department** – Enter all office workers, clinical staff, everyone, etc.
- **Lesson Frequency** – Determine if training will be assigned one time, annually, bi-annually, etc.
- **Assignment Month** – Enter the date the course is going to be assigned to users.
- **Approval from the individual in your chain of command** that reports to the Dean of the President is required. Did you obtain their approval? Please list the name of this individual.

19) Once this form is completed, click on  at the bottom of the page.

20) The final step in the **New Course Wizard** is the **Finish** tab.

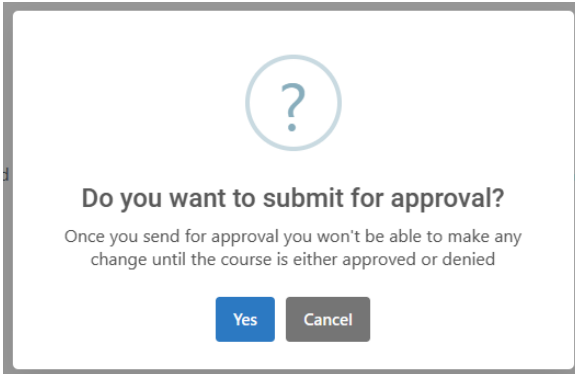
a) In the **Finish** tab, you will have one of two options: **Save for later** or **Submit for approval**.



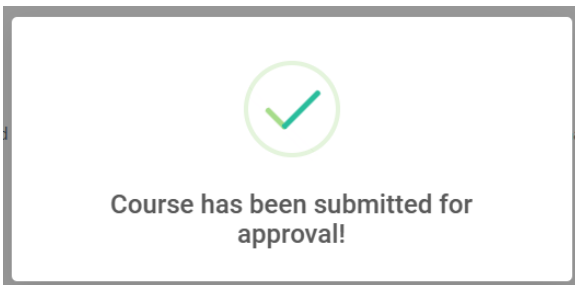
21) When you click the  option, you will see the following pop-up box:

a) If you are ready to submit the course, click **Yes** to submit for approval.

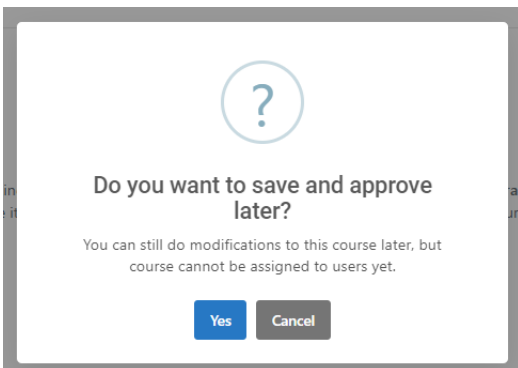
*Note: If you need to back to the **Finish** tab, click **Cancel**.*



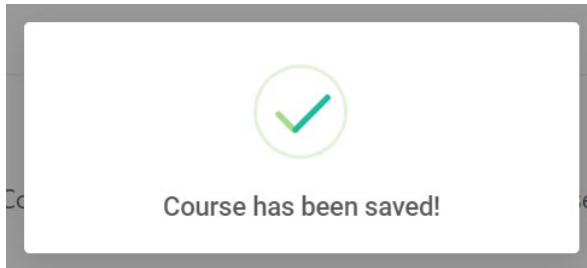
b) Once you click **Yes**, you will see the pop-up screen below confirming the course has been submitted for approval:



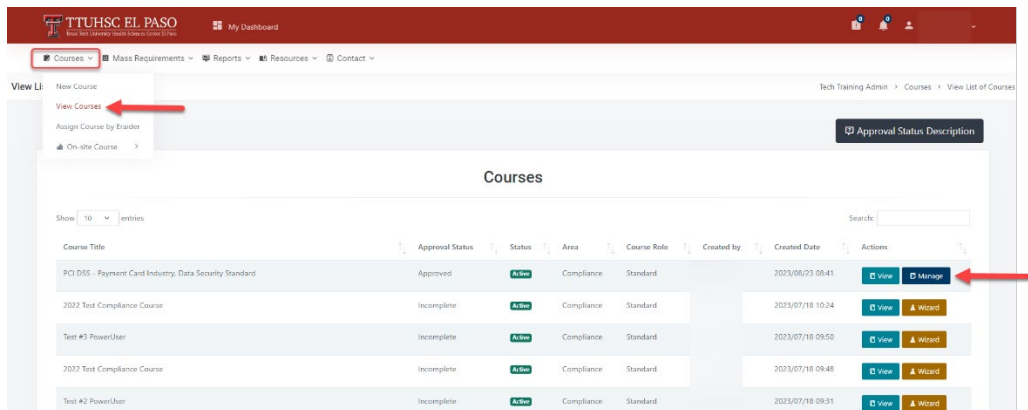
22) If you click on the **Save for later** option, you will see the pop-up box below. Click **Yes** to confirm. *Note: To go back to the **Finish** tab, click **Cancel**.*



- a) When you click **Yes**, you will see the following pop up box stating the training has been saved:



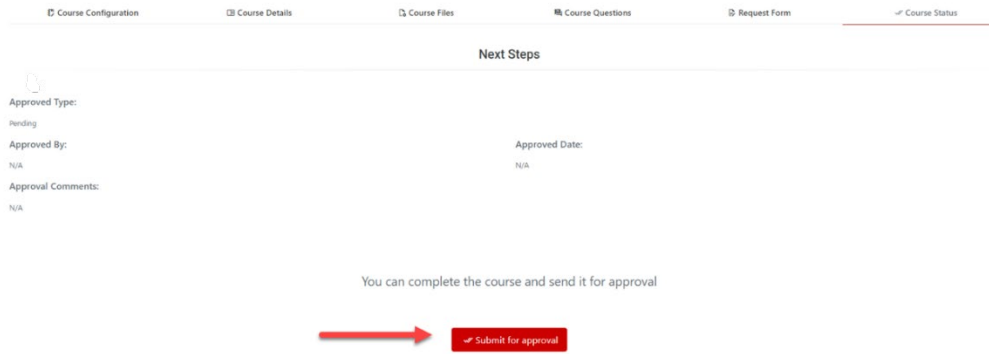
- 23) If you need to go back to a course that has been saved, click on the **Courses** → **View Courses** section to locate the training. The status under the **Actions** column will change to **Manage**. Click on the **Manage** button to open the training.



- 24) You will be directed to the **Course Configuration** screen. From here, you can click on any one of the tabs to **modify/update** the information.

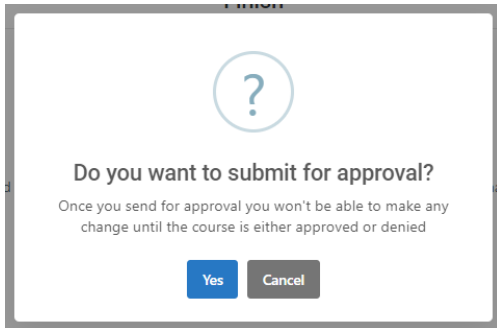
- If you **modify/update** information in one of the tabs, make sure to click on the **Save** button at the bottom of the page.

- 25) Once you have **modified/updated** the information, go to the **Course Status** tab and click on **Submit for Approval**.



26) When you click on **Submit for Approval**, you will see the pop-up screen below. You may choose to submit the course by selecting **Yes**, or choose **Cancel** to go back to the **New Course Wizard** screen.

27) If you choose **Yes**, you will get another pop-up box indicating the course has been submitted.



28) Once a course has been **submitted for approval**, an automated email will be sent to the Committee members.

29) When the course has been **approved/denied** by a Committee member, you will receive an automated notification via email.

- Example for when course has been approved:

From: no-reply@tuhsc.edu <no-reply@tuhsc.edu>
 Sent: Saturday, December 31, 2022 8:31 AM
 To: [Redacted]
 Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

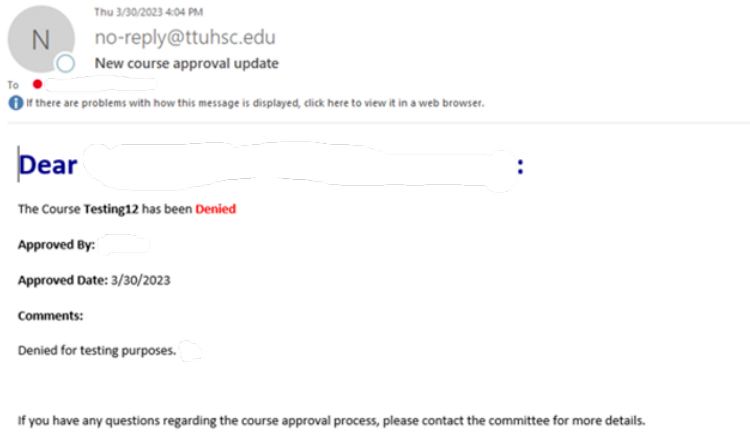
Approved By: [Redacted]

Approved Date: 12/31/2022

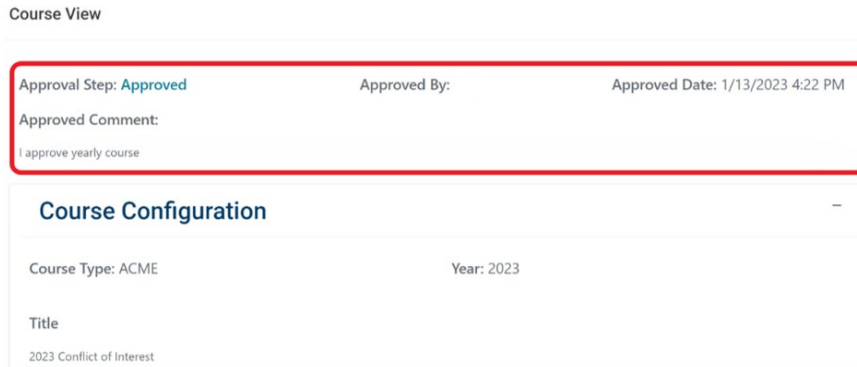
Comments:

approve

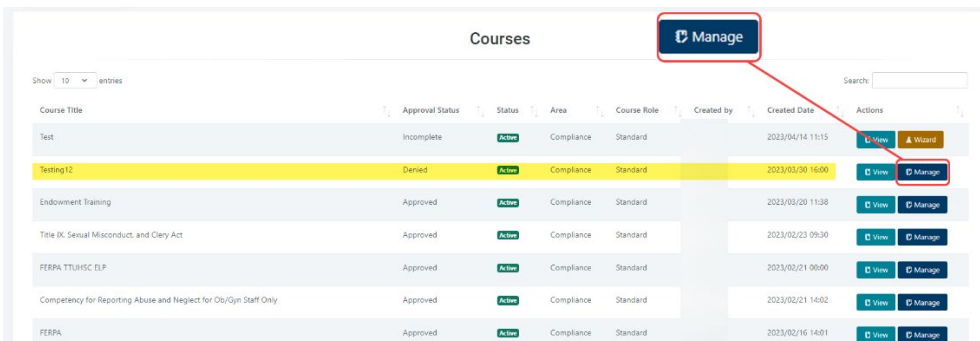
- Example for when course has been denied:



- 30) If the course is **denied** and changes need to be made, go to the **Courses** tab at the top-left side of the page. Click on the **View Courses** section, look for the course and click on the **View** button.
- a) In the **Course View** section, you can see the status of the course. If denied, Committee members will indicate the reason for denial under the **Approved Comment** section.



- 31) If changes need to be made, you can go to the **Manage** button on the right.



32) Once you have made all necessary edits, you may go to the **Course Status** tab and resubmit the course for approval. (The course will be rerouted to the Committee for approval.)

Course Configuration Course Details Course Files Course Questions Request Form **Course Status**

Next Steps

Approved Type:
Denied

Approved By:

Approved Date:
3/30/2023 4:03 PM

Approval Comments:
Denied for testing purposes.

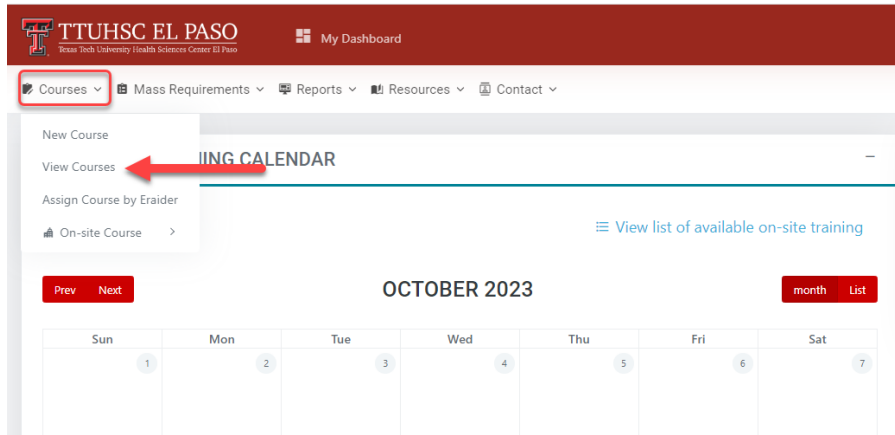
You can complete the course and send it for approval

→ [Submit for approval](#)

Note: The training owner will need to resubmit course each year for Committee approval.

COURSES – VIEW COURSES

- 1) To review courses, click on the **Courses** dropdown menu then click on **View Courses**.



- 2) In the **View Courses** section, you will see a list of all the courses that have been submitted and their **Course Status**.

Show 10 entries

Course Title	Approval Status	Status	Area	Course Role
What is IRIS and How Do I get an Account?	Approved	Active	Compliance	Standard
Human Trafficking Policy and Awareness	Approved	Active	Compliance	Standard
Test	Pending	Inactive	Compliance	Standard
Contract and Procurement Training	Incomplete	Active	Compliance	Standard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard
Cash Fund Training	Approved	Active	Compliance	Standard
Cash Fund Training	Incomplete	Active	Compliance	Standard
2023 Conflict of Interest	Approved	Active	Compliance	Standard
2023 General Compliance Training	Approved	Active	Compliance	Standard
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard

Showing 161 to 170 of 188 entries

- 3) The following are the **Course Approval Status Descriptions**:

Course Approval Status Description	
Incomplete	The course has not been configured completely
Pending	The course was saved for later but can still be modified
Completed	The course was submitted for approval
Approved	The course was approved by the committee
Denied	The course was denied by the committee

Close

4) You can also **View, Manage** or go to the **Wizard** option for the course.

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Contract and Procurement Training	Incomplete	Active	Compliance	Standard		2023/02/07 12:00	View Wizard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard		2023/01/18 10:57	View Manage
Cash Fund Training	Approved	Active	Compliance	Standard		2023/01/11 15:51	View Manage
Cash Fund Training	Incomplete	Active	Compliance	Standard		2023/01/11 15:42	View Wizard
2023 Conflict of Interest	Approved	Active	Compliance	Standard		2023/01/11 09:41	View Manage
2023 General Compliance Training	Approved	Active	Compliance	Standard		2023/01/11 09:14	View Manage
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard		2023/01/09 16:14	View Manage

- a) If you click the **View** option, you will be able to see a full description for the course when you submitted it.
- b) If you click the **Wizard** option, you will be able to update/correct anything from the course. This option will be available when the status is incomplete.
- c) If you click the **Manage** option, you will be able to update/correct anything from the course. This option will be available when the course has been submitted and if denied, you will use this option.

5) When the course has been **approved/denied** by a Committee member, you will receive an automated email notification.

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
Sent: Saturday, December 31, 2022 8:31 AM
To: [Redacted]
Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

Approved By: [Redacted]

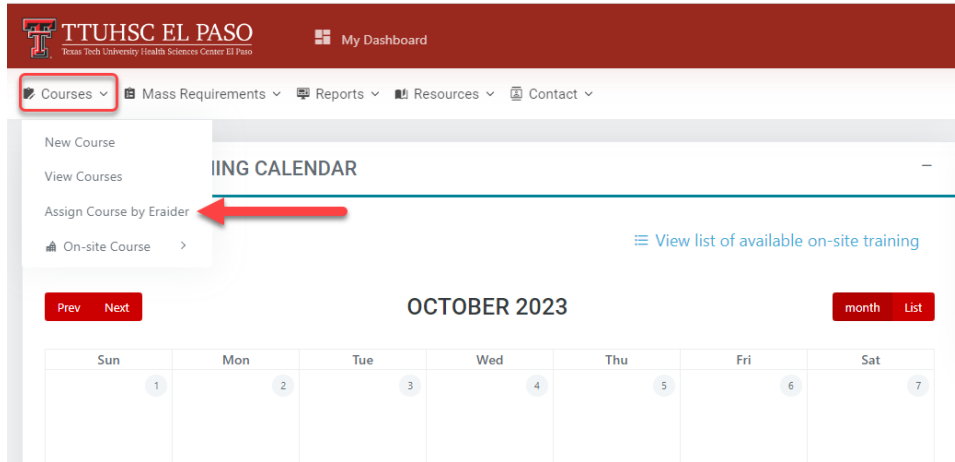
Approved Date: 12/31/2022

Comments:

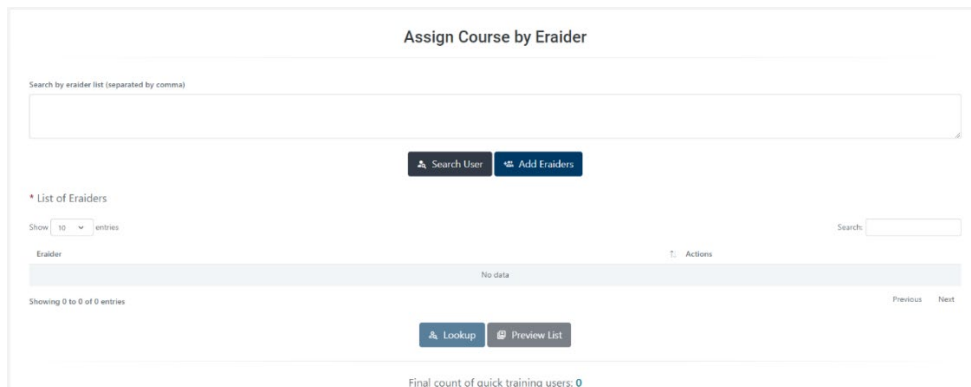
approve

COURSES – ASSIGN COURSE BY ERAIDER

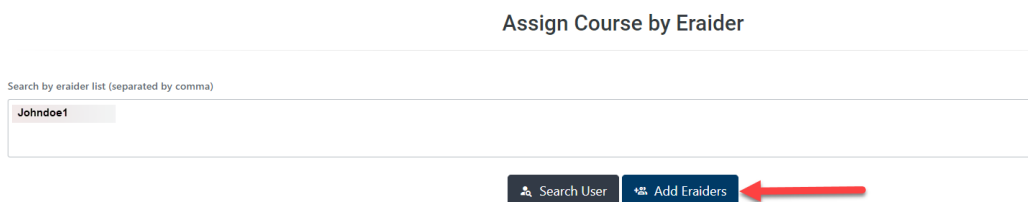
- 1) To create a course by eRaider, click on the **Courses** dropdown section, located on top of the page, then click on **Assign Course by eRaider**.



- 2) This will take you to the **Assign Course by eRaider** page.

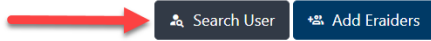


- 3) In the **Search by eRaider list** section, you can enter each eRaider individually (separated by commas). After you have entered all eRaiders that require training, click on **Add eRaiders** box at the bottom of the page.

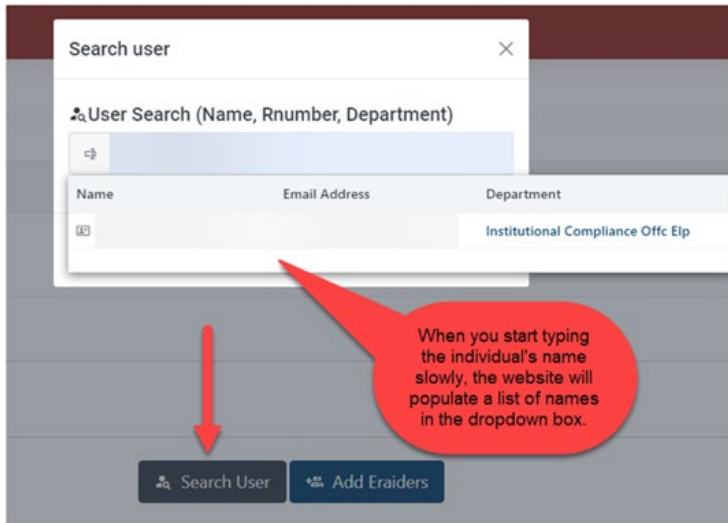


- 4) If you do not know the eRaiders for the individuals that require training, you can look up the individual in the **Search User** box.

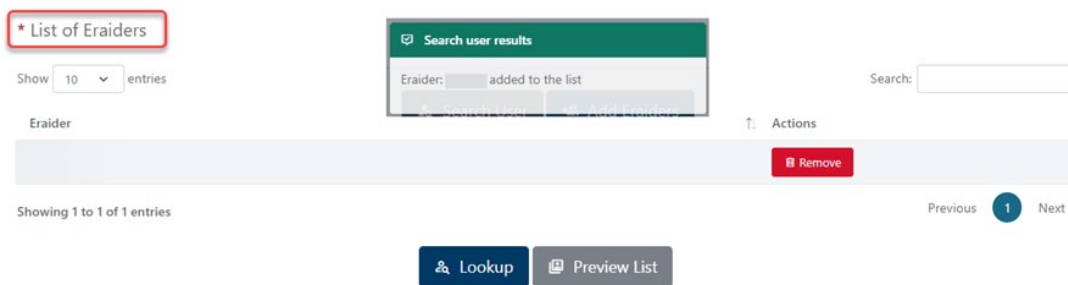
Assign Course by Eraider



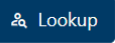
- 5) When you use the **User Search** box, a pop-up window will appear. In this section you can search by **name**, **r number** or **department**. You will have a dropdown list of names to choose from.

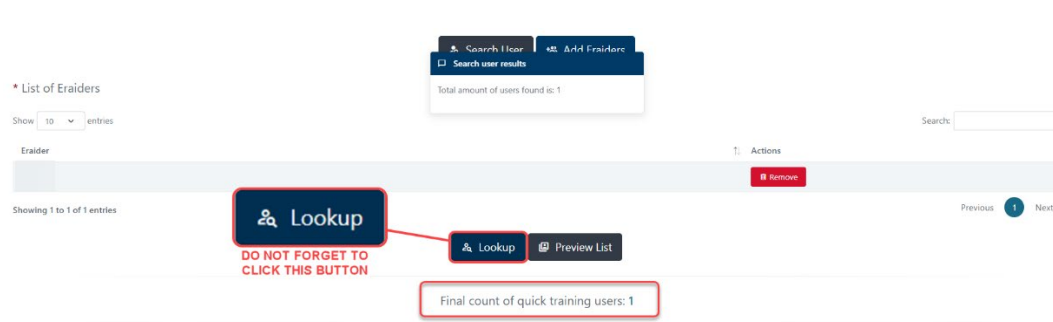


- 6) When you select the individual's name a pop-up screen will appear, after that, their eRaider will be added to the **List of eRaiders** section.

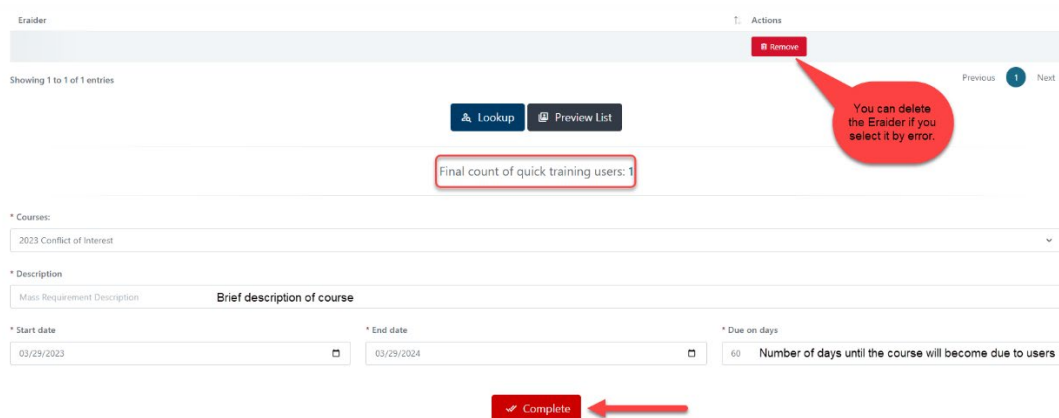


Final count of quick training users: 0

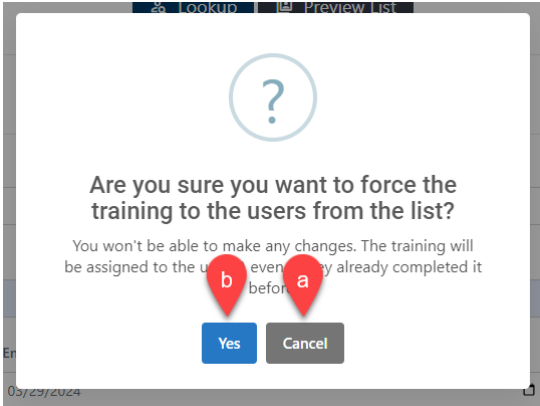
- 7) After making the selection of the users, click on the  button. This will give you a count of the users that will have the course assigned.
- If you click on the **Preview List** button, you will see a list of the users that have been selected.



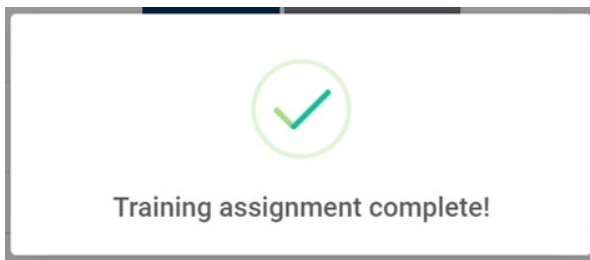
- 8) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Complete**.



- 9) Next, a pop-up window will appear.
- a) Click **Cancel** to stay on **Assign Course by eRaider** section.
 - b) Click **Yes** to proceed.



10) A pop-up notification will appear to confirm your submission.

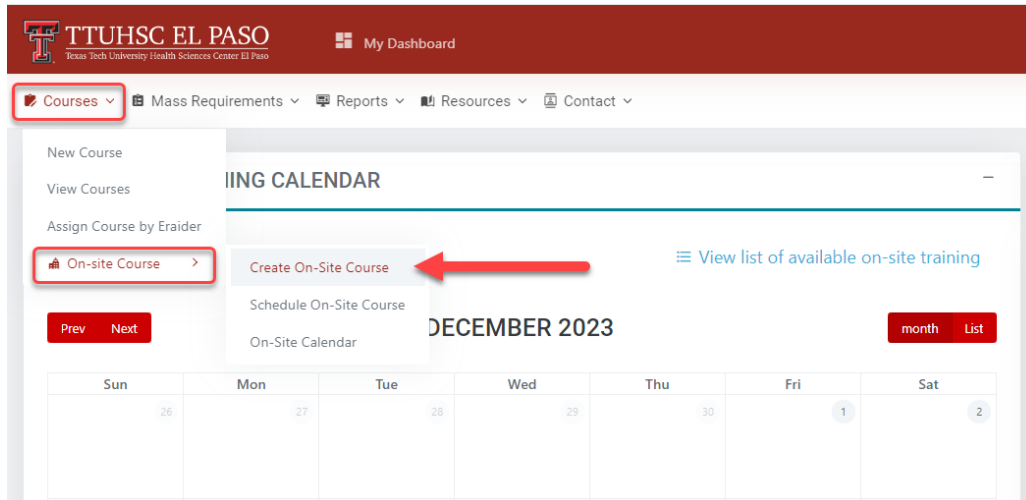


COURSES – CREATE ON-SITE COURSE

This feature will allow the user to create a course outline for individuals to register for a live, WebEx or online training session. Individuals will be able to self-enroll via the Tech Training application calendar.

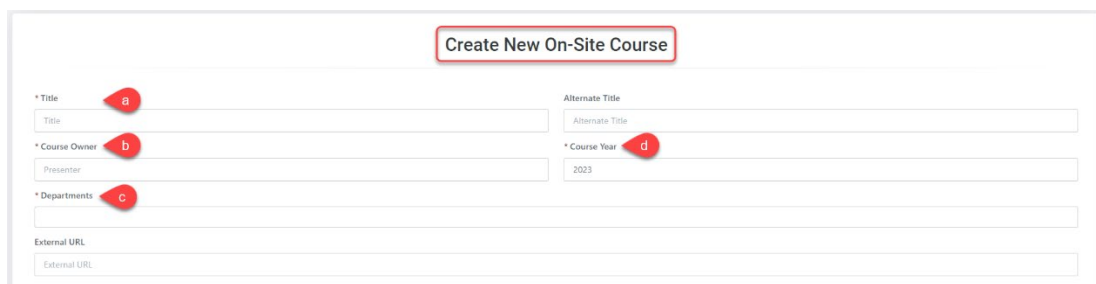
Note: This feature will only be available for PowerUser, Administrator, and Committee roles.

- 1) To create an On-Site Course, click on the **Courses** dropdown → **On-Site Course** → then click on **Create On-Site Course**. You will see the following screen:



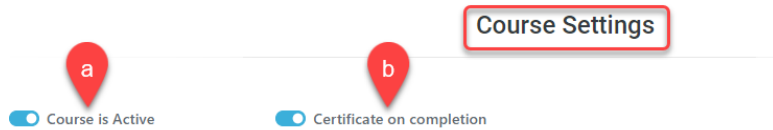
- 2) You will be directed to the **Create New On-Site Course** screen. Fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

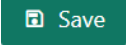
- a) **Title** – Enter your desired title.
 - **Alternate Title** – This field can be left blank or you can type in the same as the Title.
- b) **Course Owner** – Type the name of the person presenting the training.
- c) **Departments** – Choose the departments that will be able to see the course.
- d) **Course Year** – Select the current year.

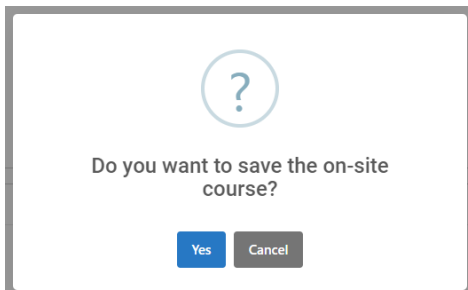
The screenshot shows the 'Create New On-Site Course' form. The title 'Create New On-Site Course' is highlighted with a red box. The form contains several input fields: '* Title' (with a red 'a' marker), 'Alternate Title', '* Course Owner' (with a red 'b' marker), '* Course Year' (with a red 'd' marker and '2023' selected), '* Departments' (with a red 'c' marker), 'External URL', and another 'External URL' field.

- 3) Next, scroll down the page and in the **Course Settings** section:

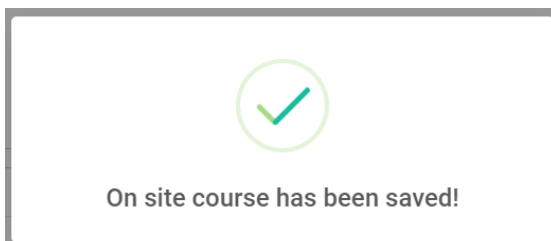
- a) Leave the **Course is Active** toggle button blue if you want everybody to see the course. If disabled, only the individuals with Administrator and PowerUser role will be able to see the course.
- b) Leave the **Certificate on completion** toggle button blue so the users can download the certificate after passing the training.



- 4) In the **Course Details** section, fill out the required fields. *Note: Required fields are identified by an asterisk (*)*.
 - a) **Course Description** – enter a short description of the course.
 - b) **Objectives** – outline the goals for the user upon the completion of this course.
 - c) **Outline** – enter a general description of the course content and instructions.
- 5) Click on the  Save button to continue.
- 6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the Create New On-Site Course screen, click Cancel.*



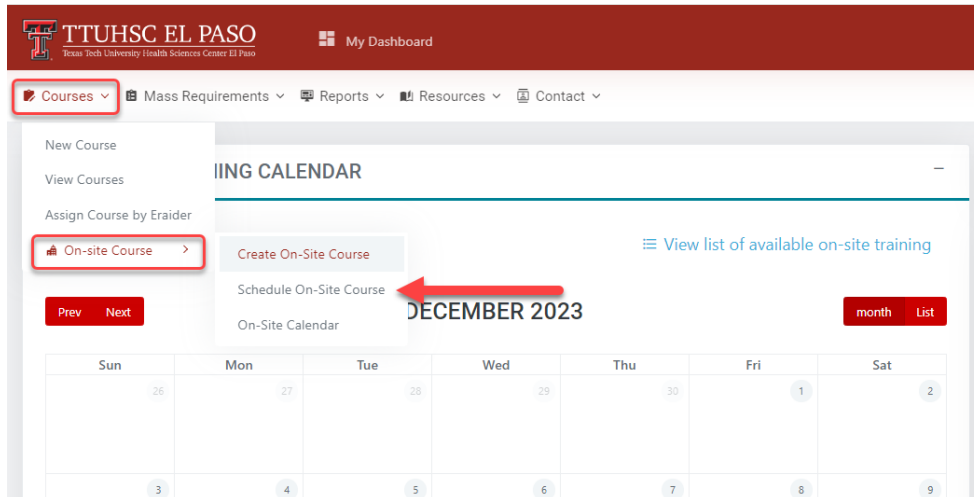
- 7) Once you click **Yes**, you will see the pop-up screen below confirming the course has been saved.



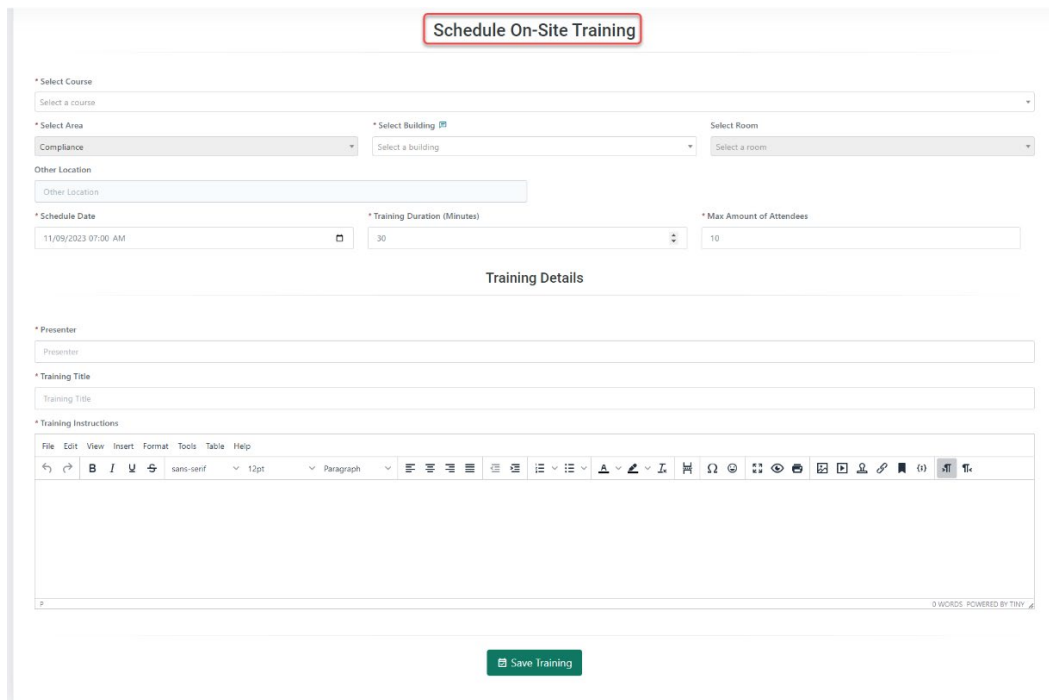
COURSES – SCHEDULE ON-SITE COURSE

This feature will allow users to set a time and place for the On-Site courses created.

- 1) To set a time and place for your course, click on the **Courses** dropdown → **On-Site Course** → then click on **Schedule On-Site Course**.



- 2) You will be directed to the **Schedule On-Site Training** screen.



- a) **Select Course** – In the dropdown field, select the training you created.
- b) **Select Area** – This field will automatically populate with your department.
- c) **Select Building** – In the dropdown field, select the building that the training will be scheduled at for users to attend. If your desired building is not listed, select the **Other** option. Once the building is selected, you will be able to select the room.
 - **Select Room** – In the dropdown field, select the room number.
 - **Other Location** – If you choose the **Other** option in the **Select Building** field, type your desired building and room number.

3) Scroll down and fill in the following fields.

- a) **Schedule Date** – Select the date and time of the training session.
- b) **Training Duration** – Indicate the length of time, in minutes, the training will take.
- c) **Max Amount of Attendees** – Indicate the maximum amount of people that can attend the training session.

4) Next, go down the page and in the **Training Details** section, fill out the required fields.

Note: Required fields are identified by an asterisk ().*

- a) **Presenter** – Name of the person who is presenting the training.
- b) **Training Title** – Type the name of the course you created.
- c) **Training Instructions** – Indicate what the users are going to do in the training session or if they will need to log in to web-based training.

Training Details

* Presenter a

Max Compliance

* Training Title b

Test

* Training Instructions c

File Edit View Insert Format Tools Table Help

← → B I U ↺ sans-serif 12pt Paragraph

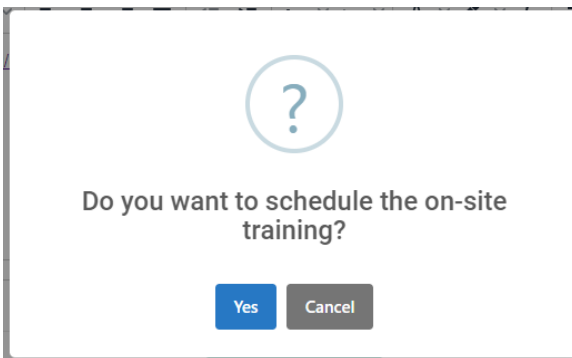
1. Test 1
2. Test 2
3. Test 3

6 WORDS. POWERED BY TINY

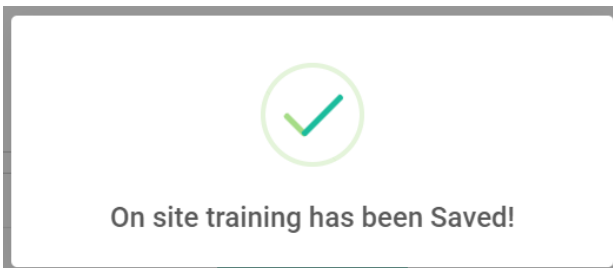
Save Training

5) When you are ready, click on the **Save Training** button.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the Schedule On-Site Training screen, click **Cancel**.*



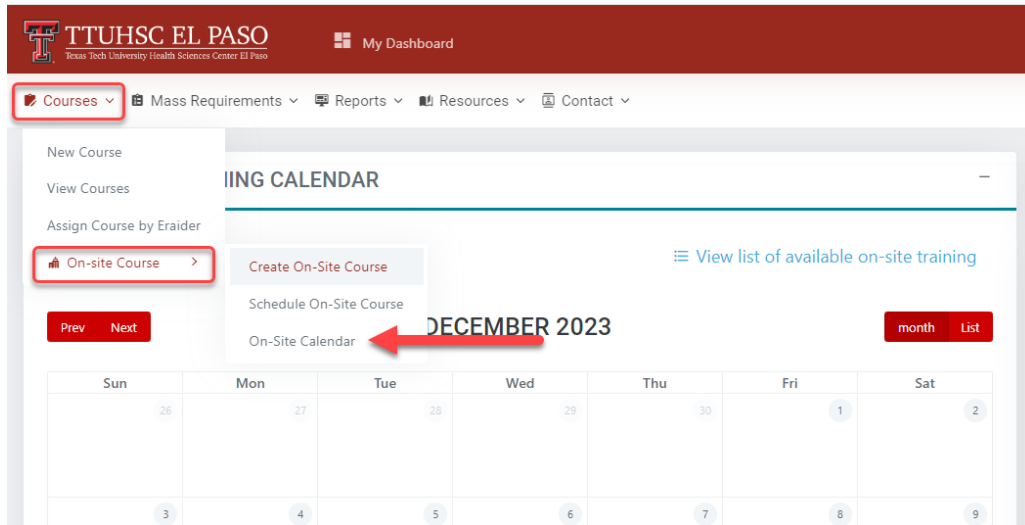
7) Once you click **Yes**, you will see the pop-up screen below confirming the On-Site training has been saved.



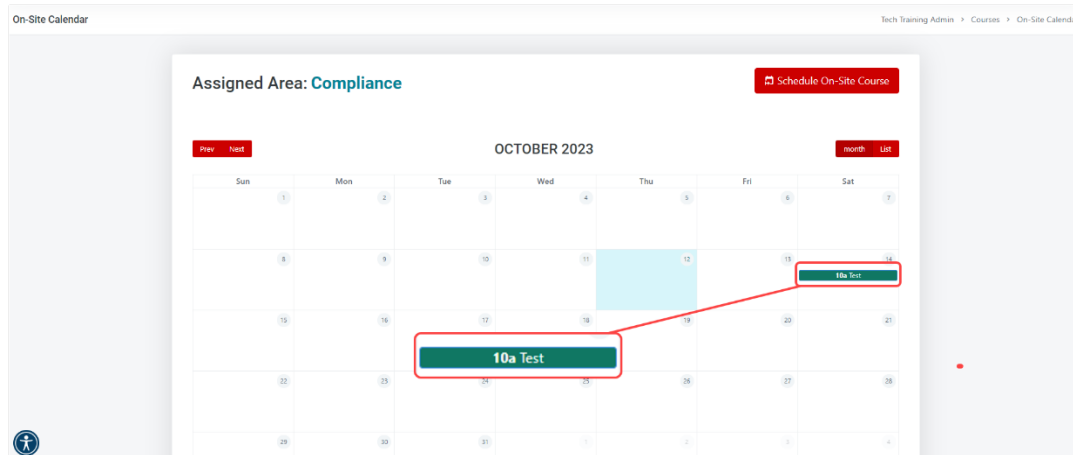
COURSES – ON-SITE CALENDAR

This feature will allow the user to modify/update the **On-Site Training** details such as the course, area, location, duration, training instructions, etc.

- 1) To see the **On-Site Calendar**, click on the **Courses** dropdown → **On-Site Course** → then click on **On-Site Calendar**.



- 2) You will be directed to the **On-Site Calendar**. The available courses will appear in the calendar.
 - a) If you want to see the details for that course, click on the name of the course.



- 3) Next, you will see the **Event View** screen. In this page you will be able to see all details for that course.

Event View

Assigned Area: Compliance Status: Active

Training Details

Training Title
Text

Presenter: Max Compliance Max Amount of Attendees: 10

Schedule Date: Saturday, October 14, 2023 10:00 AM Location: CBS Building Conference Room 1A123

Training Duration: 60 Minutes

Training Instructions

1. Test 1
2. Test 2
3. Test 3

Course Details

Title
Text

Alternate Title



Owner Course Year: 2023


External URL
N/A

Course Description
Text

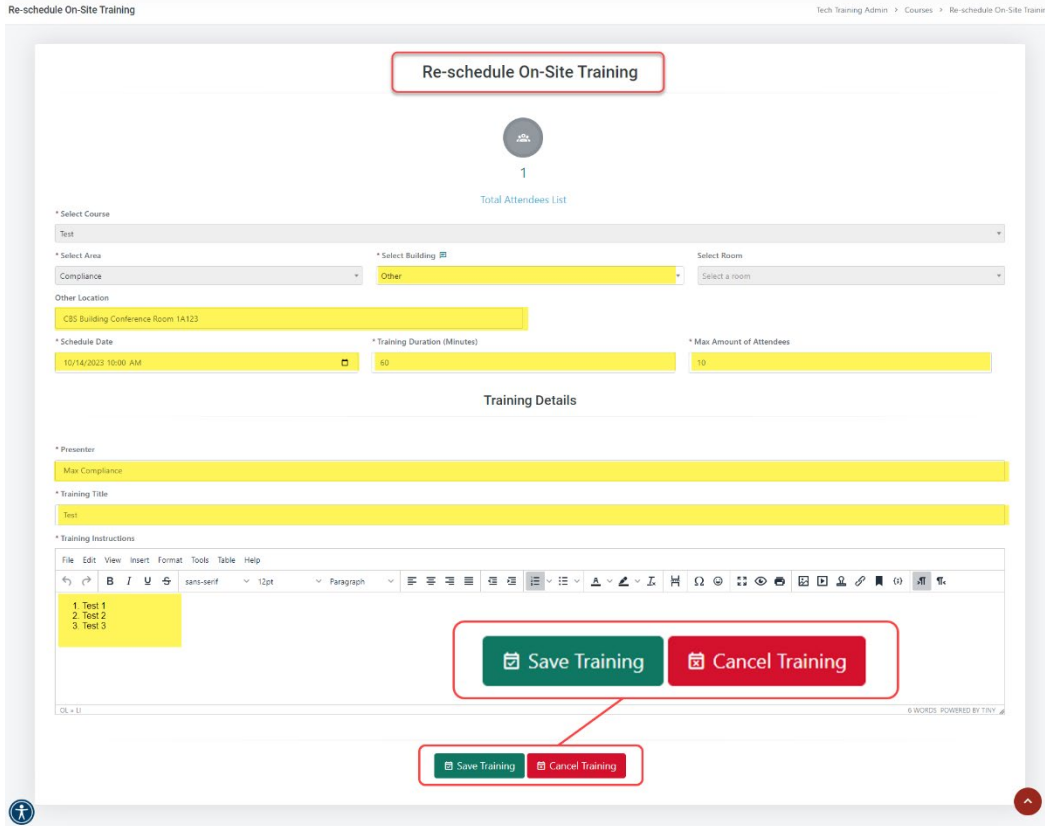
Objectives
Text

Outline
Text

- 4) To modify/update the information for the course, click on the  button at the bottom of the page.
- 5) You will be directed to the **Re-schedule On-Site Training** page. You can change/update the building, location, date, duration, and number of attendees, presenter, title, and instructions.

Note: Do not forget to click on Save Training if you change/update any information. You can also cancel the training if desired.



a) To see the list of attendees, click on the [Total Attendees List](#) link at the top of the page. You will see the following list:

Attendees List

Attendance Notes: ×
By clicking yes the user will get a record of having completed this training successfully

Excel Copy PDF Search:

Eralder	User Name	Email	Enrolled Date	Attended?	Log
			10/12/2023	<input checked="" type="checkbox"/> Yes	N/A

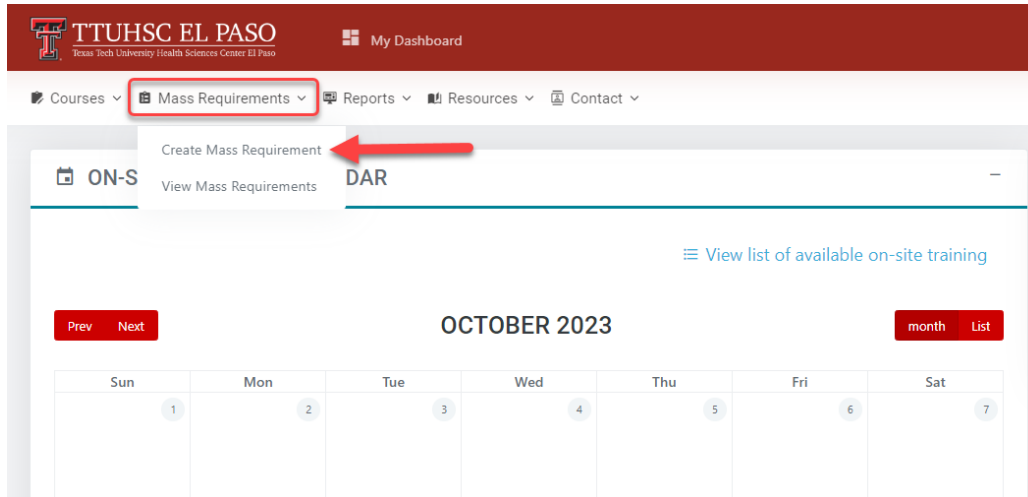
Showing 1 to 1 of 1 entries Previous 1 Next

Note: If the training has ended, you can no longer make changes to the training.

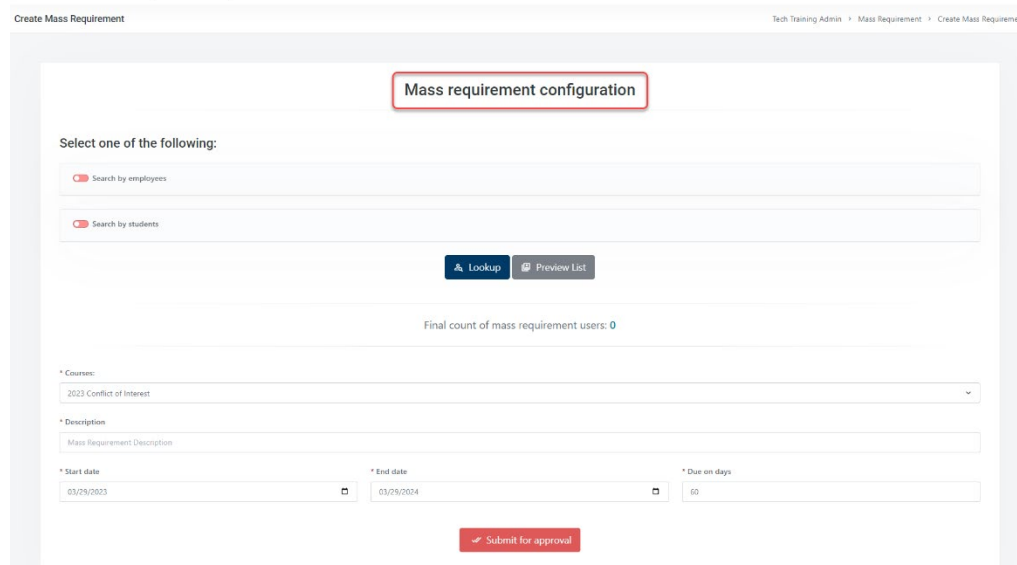
b) At this point, the presenter can confirm attendance by clicking in the **Yes** toggle button in the **Attended?** Column. This gives the user credit for attending the training.

MASS REQUIREMENT – CREATE A MASS REQUIREMENT

- 1) To create a Mass requirement, click on **Mass Requirements** dropdown section, located on top of the page, then click on **Create Mass Requirement**.



- 2) This will take you to the **Mass requirement configuration** page.



- 3) To use the **Search by employees** option:
 - a) In the **Applies to** dropdown menu, you will be able to select **All Employees**, **Existing employees only** or **New employees only**.
 - The **All Employees** option will allow you to select all employees.

Courses ▾ Mass Requirements ▾ Reports ▾

Mass requirement configuration

Select one of the following:

Search by employees

Notes:

- If "All employees" is selected all other parameters will be ignored
- If "All employees" is selected new and current employees will be searched

* Applies to

All Employees
All Employees
 Existing employees only
 New employees only

- b) If you select **Existing employees only** or **New employees only**, you will have the option to choose **All Staff** or **All Faculty**. You may select both options at the same time, if needed.

Search by employees

Notes:

- If "All employees" is selected all other parameters will be ignored
- If "All employees" is selected new and current employees will be searched

* Applies to

Existing employees only ▾

Select one or more (Optional)

All Staff All Faculty

- c) If you select **Existing employees only** or **New employees only**:
- You will have the option to select the department under the **Select a department** dropdown box and the positions under the **Select a position** dropdown box.

Select one or more (Optional)
 All Staff All Faculty

Employee targeting (Optional)

Select a department

ins Search...

Institutional Compliance Offc Eip

Select a position

senior of Search...

Senior Safety Officer Senior Office Assistant

When you make a selection, the department/position will move over to the column on the right side, this indicates the specific field has been selected.

If you select the incorrect department/position, from the right column, click on the name and it will unselect it.

4) To use the **Search by students** option:

a) In the **Applies to** dropdown section you will have 3 options: **All Students**, **Existing students only** and **New students only**.

- The **All Students** option will allow you to select all students.

Search by students

Notes:

- If "All students" is selected all other parameters will be ignored
- If "All students" is selected new and current employees will be searched

* Applies to

All Students

All Students

Existing students only

New students only

b) If you select **Existing Students only** or **New students only**:

- You will have the option to select any **college/program**. Click on the desired college/program under the **Select a college** and **Select a program** dropdown boxes.

Student targeting (Optional)

Select a college


Search...	Search...
Grad School Biomed - El Paso	Gayle Greve Hunt SON El Paso
Paul L Foster SOM in El Paso	
School of Dental Medicine	

When you make a selection, the department/position will move over to the column on the right side, this indicates the specific field has been selected.

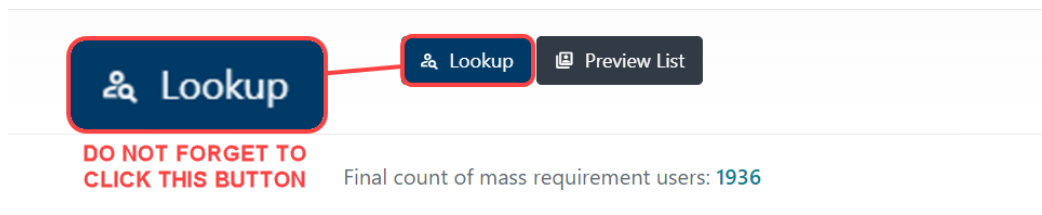
Select a program

Search...	Search...
GE	DM
GN	
MD	
UN	

If you select the incorrect college/program, from the right column, click on the name and it will unselect it.

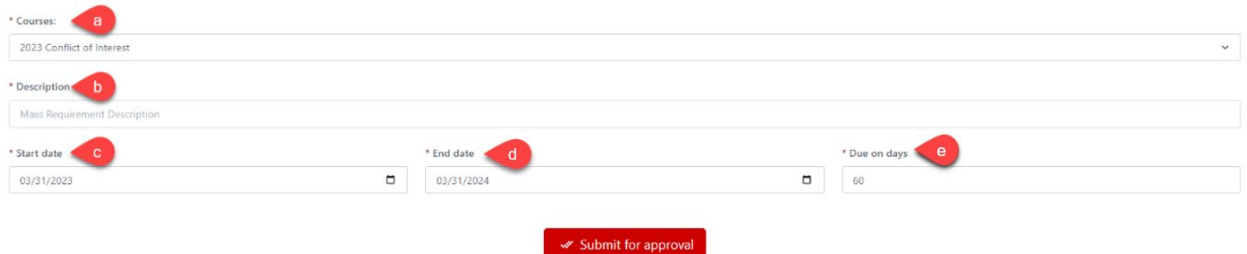
5) After making the selection of the users, click on the  button. This will give you a count of the users that will be assigned to the mass requirement.

- If you click on the **Preview List** button, you will see a list of the users that will be assigned to the mass requirement.



The screenshot shows two buttons: a blue "Lookup" button with a magnifying glass icon and a grey "Preview List" button with a list icon. A red callout box points to the "Lookup" button with the text "DO NOT FORGET TO CLICK THIS BUTTON". Below the buttons, the text "Final count of mass requirement users: 1936" is displayed.

6) Next, you will scroll down to the bottom portion of the **Mass requirement configuration**.



The form includes the following fields:

- * Courses:** A dropdown menu with "2023 Conflict of interest" selected. A red callout 'a' points to this field.
- * Description:** A text field with "Mass Requirement Description". A red callout 'b' points to this field.
- * Start date:** A date field with "03/31/2023". A red callout 'c' points to this field.
- * End date:** A date field with "03/31/2024". A red callout 'd' points to this field.
- * Due on days:** A number field with "60". A red callout 'e' points to this field.

At the bottom of the form is a red button with a checkmark icon and the text "Submit for approval".

a) The **Courses** section will have a dropdown list where you can select the course you need.

* Courses:

- 2023 Conflict of Interest
- 2023 Conflict of Interest**
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training
- Basic Informed Consent Training
- Basics of Clinicaltrials.gov
- Basics of Conducting a Retrospective Chart Review Study
- Basics of Data Collection and Data Management
- Basics of Data Collection and Data Management for Retrospective Chart Reviews
- Box Training
- Building a Regulatory Binder
- Cash Fund Training
- Competency for Reporting Abuse and Neglect for Ob/Gyn Staff Only
- Creating and Maintaining Data Collection Forms
- Endowment Training
- FERPA
- FERPA TTUHSC ELP
- Human Trafficking Policy and Awareness
- Informed Consent Process Do's and Don'ts

b) Enter a brief description in this section:

* Description Brief description of mass requirement

Mass Requirement Description

c) **Start date** – Enter the current date

*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

d) **End date** – enter the last day of the current calendar year. This ensures that the course remains active for the calendar year. (Remember, each calendar year you will be required to upload the course and obtain Committee approval.)

e) **Due on days** – Enter the number of days the users have to complete the course.

* Start date

* End date

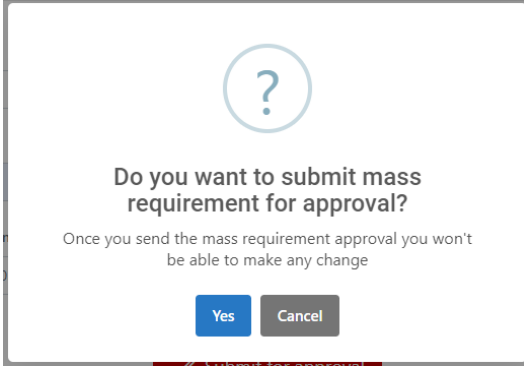
* Due on days

7) Once you have entered all the required fields, click on the ✔ Submit for approval button at the bottom of the page.

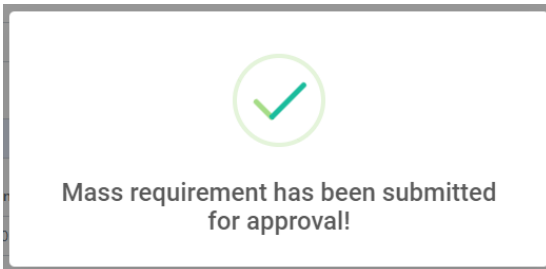
8) You will see the following pop-up:

a) If you are ready to submit the mass requirement, click **Yes** to submit for approval.

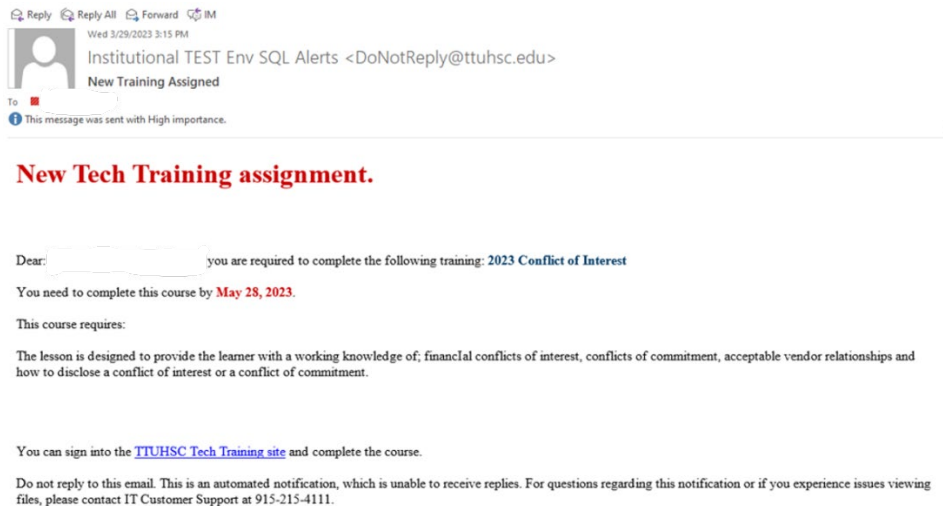
*Note: If you need to back to the **Finish** tab, click **Cancel**.*



9) If you click **Yes**, you will see the following notification:

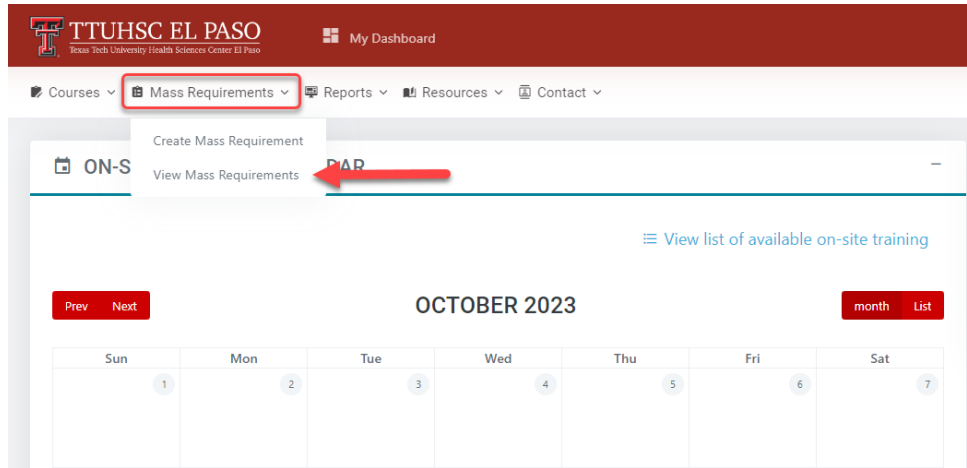


- 10) The **Mass Requirement** will be routed for approval to the Committee before the training is assigned.
- 11) To check on the **Mass Requirement** approval status, refer to the **Mass Requirement Report**.
- 12) Once the **Mass Requirement** has been approved by the Committee, the users will receive an email notification stating the training has been assigned.




MASS REQUIREMENT – VIEW MASS REQUIREMENT

- 1) To check the status of a mass requirement, go to the **Mass Requirement** dropdown and click on **View Mass requirements**.



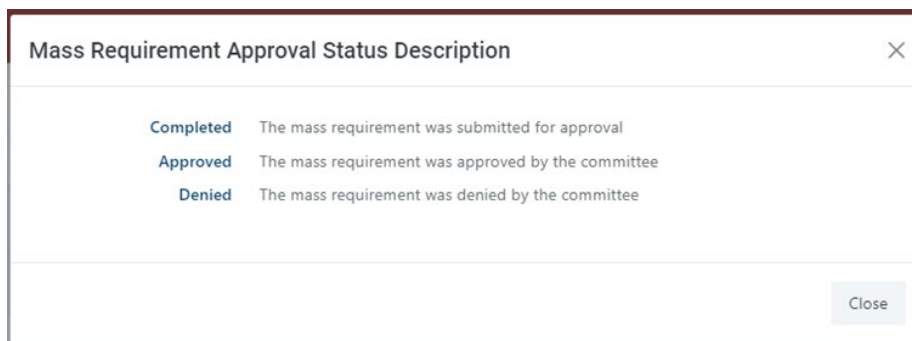
- 2) This will take you to the **Mass Requirement List** where you can check the status of the assignment in the **Approval Status** column.

 **Mass Requirement List**

Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
For research and IRIS purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard		2023/02/08 14:10	View E Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard		2023/02/07 14:34	View E Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard		2023/02/07 14:24	View E Log
For research and IRIS purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard		2023/02/06 16:38	View E Log
For research and IRIS account purpose.	Basic Informed Consent Training	Approved	No	Compliance	Standard		2023/02/06 16:37	View E Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard		2023/02/06 11:32	View E Log
TST EDGAR	TEST QUICK TRAINING	Approved	No	Safety Services	Quick-Training		2023/02/03 18:02	View E Log
For research and IRIS accounts	Basic Informed Consent Training	Approved	No	Compliance	Standard		2023/02/02 16:47	View E Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard		2023/01/24 16:54	View E Log
for research and its purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard		2023/01/24 15:22	View E Log

Showing 1 to 10 of 44 entries

- a) Click on the top right side of the page to see the **Approval Status Descriptions**.



3) In the **Actions** column, you can select **View**, **Log** or **Cancel** buttons.

Mass Requirement List

Show 10 entries Search:

Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
Assignment of LSE course	Laboratory Safety Essentials	Completed	No	Safety Services	Quick-Training		2023/04/13 11:26	<div style="border: 1px solid red; padding: 2px;"> View Log Cancel </div>
Required to work in laboratory/be added	Laboratory Safety Essentials	Completed	No	Safety Services	Quick-Training		2023/04/13 11:08	<div style="border: 1px solid red; padding: 2px;"> View Log Cancel </div>

a) If you click on the **View** button, you will be able to look at detailed information entered in the **Mass Requirement**.

Mass Requirement View

Approval Step: **Approved** Approved By: Approved Date: 5/19/2023 12:00 AM

Comments
No Approval necessary

Mass Requirement Configuration

Course title
Refresher Training - Emergency Procedures EP-2023

Mass Requirement Description
Mass requirement to insert refresher AP-2022 completed trainings

Area: Safety Services Created by:

Course Role: Standard Created date: 5/19/2023 12:00:00 AM

Start date: 1/1/2022

End date: 1/1/2022

Amount of impacted users: 2056

b) The **Log** button will show you the **Course Log**. This section will display the history of the **Mass Assignment**.

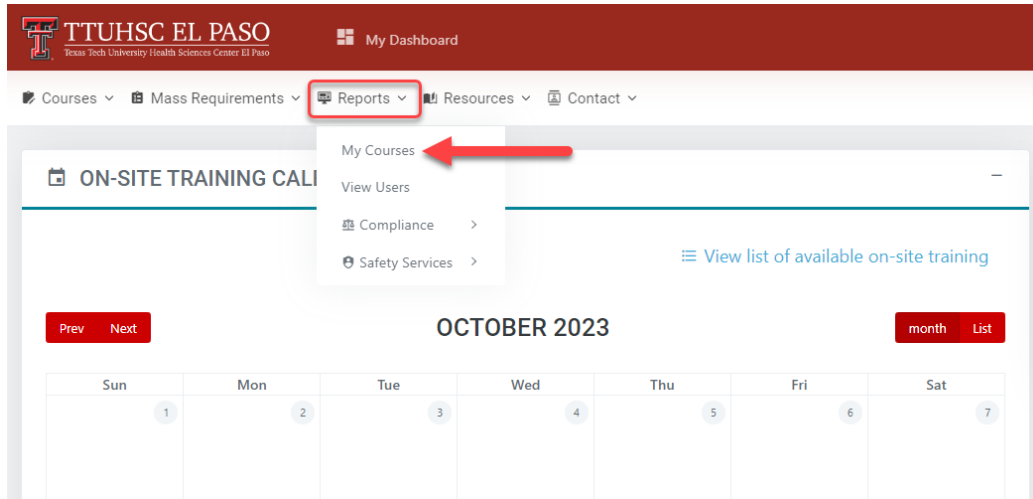
Course Log

Log Type	Log	Changed By	Changed Date
ManageCourse	Course status changed to: Approved by: jufguier on: 1/13/2023 4:22:11 PM		1/13/2023 4:22 PM
ManageCourse	Course status changed to: Completed by: aconkovi on: 1/11/2023 10:08:47 AM		1/11/2023 10:08 AM
ManageCourse	Question changed from: The appearance of a Conflict of Interest is defined as: to: The appearance of a Conflict of Interest can be defined as:		1/11/2023 9:59 AM
ManageCourse	Question changed from: A faculty member must be present before a health care vendor can interact with students and/or residents or fellows about their products. to: A faculty member must be present before a health care vendor can interact with students, residents or fellows about their products.		1/11/2023 9:57 AM
ManageCourse	Question changed from: If you engage in research you will also have to complete a disclosure form for the TTUHSC El Paso Conflict of Interest in Research Committee (COIRC) to: If you engage in research you will have to complete a disclosure form for the TTUHSC El Paso Conflict of Interest in Research Committee (COIRC)		1/11/2023 9:57 AM
ManageCourse	Question changed from: A faculty member must be present before a Health Care Vendors can interact with students and/or residents or fellows about their products. to: A faculty member must be present before a health care vendor can interact with students and/or residents or fellows about their products.		1/11/2023 9:56 AM

c) The button will delete the mass requirement.

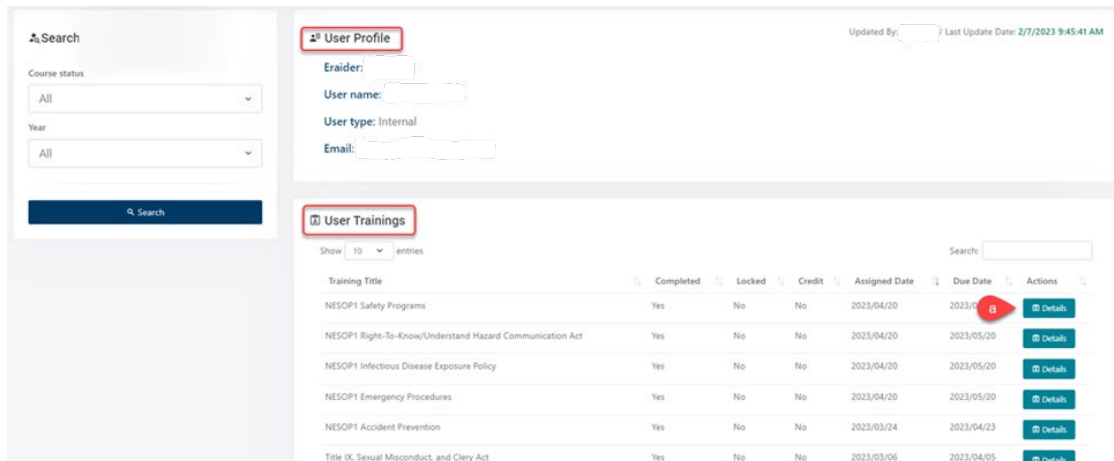
REPORTS – MY COURSES

- 1) To check your profile and course status, click on **Reports** dropdown section, located on top of the page, then click on **My Courses**.



The screenshot shows the top navigation bar of the TTUHSC El Paso website. The 'Reports' dropdown menu is open, and 'My Courses' is highlighted with a red arrow. Below the navigation bar, there is a calendar for October 2023. The calendar shows the days of the week and the dates 1 through 7. There are 'Prev' and 'Next' buttons on the left and 'month' and 'List' buttons on the right.

- 2) Next, you will see the following page. In this page you will find your personal information such as the **User Profile** and the **User Trainings**.



The screenshot shows the 'User Profile' and 'User Trainings' page. The 'User Profile' section includes fields for 'Eraider', 'User name', 'User type: Internal', and 'Email'. The 'User Trainings' section displays a table of training records with columns for Training Title, Completed, Locked, Credit, Assigned Date, Due Date, and Actions. A red arrow points to the 'Details' button for the first training record.

Training Title	Completed	Locked	Credit	Assigned Date	Due Date	Actions
NESOP1 Safety Programs	Yes	No	No	2023/04/20	2023/05/20	Details
NESOP1 Right-To-Know/Understand Hazard Communication Act	Yes	No	No	2023/04/20	2023/05/20	Details
NESOP1 Infectious Disease Exposure Policy	Yes	No	No	2023/04/20	2023/05/20	Details
NESOP1 Emergency Procedures	Yes	No	No	2023/04/20	2023/05/20	Details
NESOP1 Accident Prevention	Yes	No	No	2023/03/24	2023/04/23	Details
Title IX Sexual Misconduct and Clery Act	Yes	No	No	2023/03/06	2023/04/05	Details

- a) Under the **Details** button, you can get detailed information of the trainings you have been assigned. You can also **Download a certificate of completion**.

Training View

Current Status: **Completed**

Training

Course
NESCIP Accident Prevention

Year: 2023

Recurring: One time

Requires Test: Yes

Number of questions on Quiz: 10

Number of correct questions on Quiz: 8

My training details

Assigned Date: 3/24/2023

Due Date: **4/23/2023**

Attempts: 1

Final Grade:

Completed Date: 4/3/2023

[Download certificate of completion](#)

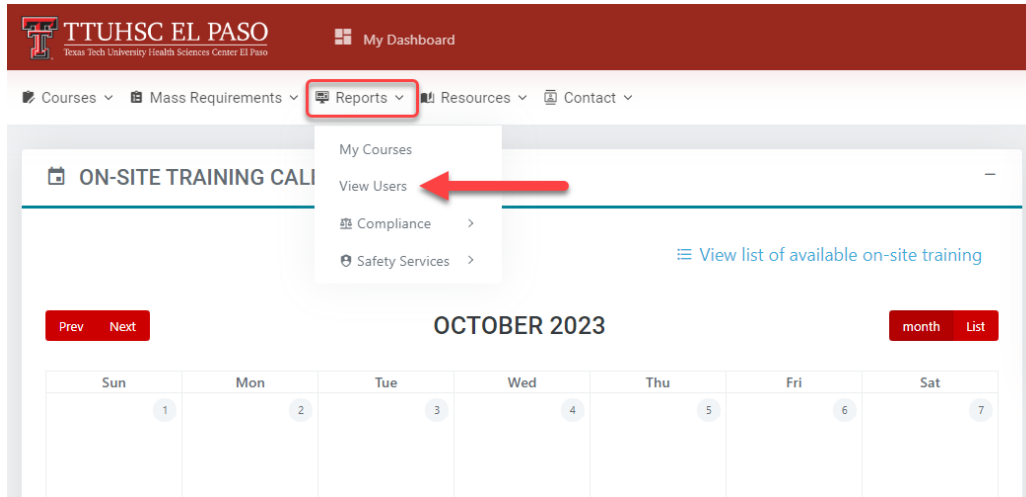
[Download certificate of completion](#)

My Exams

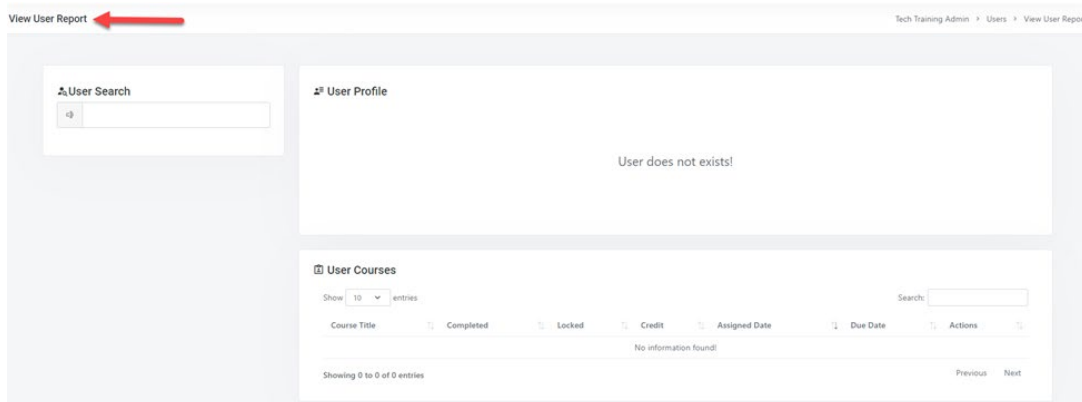
Start Date	Completed	Finish Later	Completed Date	Passed	Correct Answers	Grade
2023/04/03	Yes	No	4/3/2023	Yes		

REPORTS – VIEW USERS

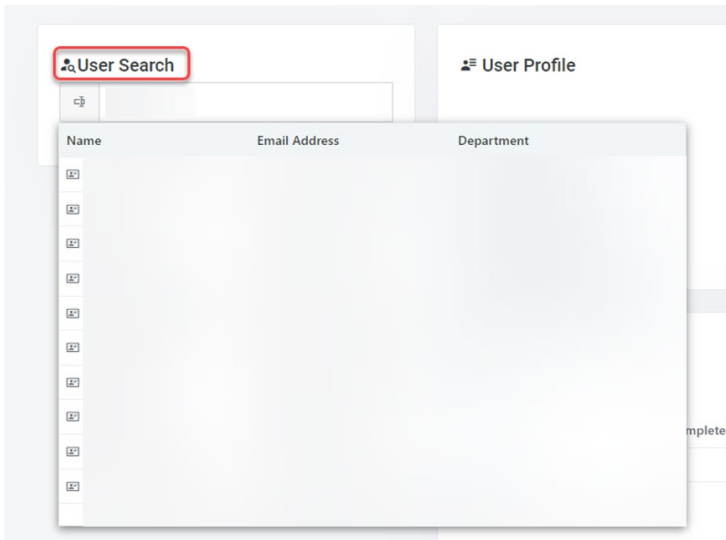
- 1) To search for users, click on **Reports** dropdown section, located on top of the page, then click on **View Users**.



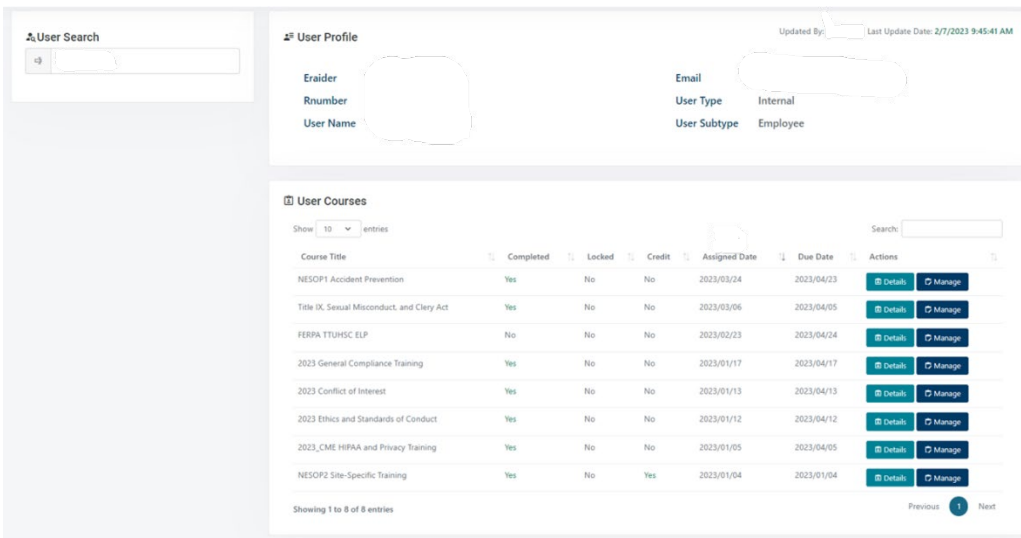
- 2) Next, you will find the **View User Report** page.



- 3) In the **User Search** section, you will have access to look for a specific individual with the **eRaider, first name and/or last name**. A list of names will appear in a dropdown box.



- 4) Select the name of the individual. The following page will display the **User Profile** and the **User Courses**.



- 5) If you click on the **Details** button, it will direct you to the **View User Course Details** page.

User Courses

Show 10 entries

Search:

Course Title	Completed	Locked	Credit	Assigned Date	Due Date	Actions
NESOP1 Accident Prevention	Yes	No	No	2023/03/24	2023/04/23	Details Manage
Title IX, Sexual Misconduct, and Clery Act	Yes	No	No	2023/03/06	2023/04/05	Details Manage
FERPA TTUHSC ELP	No	No	No	2023/02/23	2023/04/24	Details Manage
2023 General Compliance Training	Yes	No	No	2023/01/17	2023/04/17	Details Manage
2023 Conflict of Interest	Yes	No	No	2023/01/13	2023/04/13	Details Manage
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12	2023/04/12	Details Manage
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05	2023/04/05	Details Manage
NESOP2 Site-Specific Training	Yes	No	Yes	2023/01/04	2023/01/04	Details Manage

Showing 1 to 8 of 8 entries

Previous 1 Next

a) In this page you can see a detailed description of the trainings and exams the individual has taken.

Training

Current Status: **Completed**

Course
NESOP1 Accident Prevention

Year: 2023

Recurring: One time

Requires Test: Yes

Number of questions on Quiz: 10

Number of correct questions on Quiz: 8

My training details

Assigned Date: 3/24/2023

Due Date: 4/23/2023

Attempts: 1

Final Grade:

Completed Date: 4/3/2023

My Exams

Start Date	Completed	Finish Later	Completed Date	Passed	Correct Answers	Grade
2023/04/03	Yes	No	4/3/2023	Yes		

6) If you click on **Manage**, it will direct you to the **Manage User Course** page.

User Courses

Show 10 entries

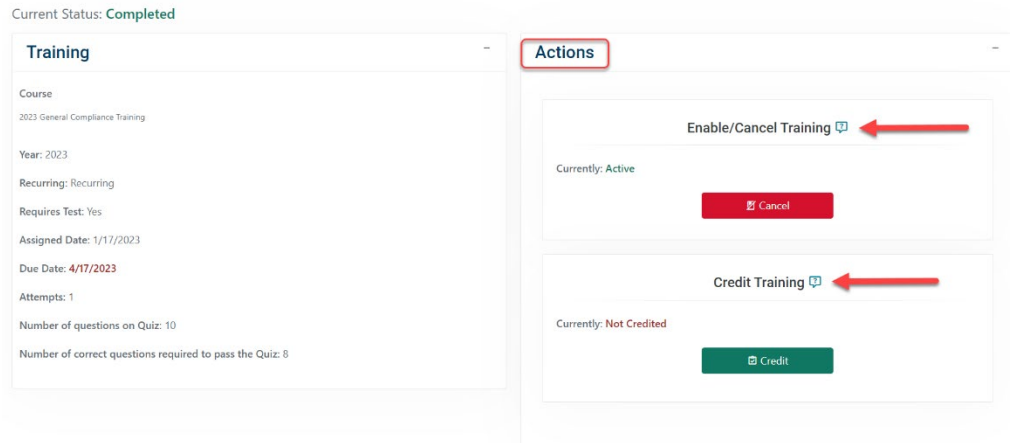
Search:

Course Title	Completed	Locked	Credit	Assigned Date	Due Date	Actions
NESOP1 Accident Prevention	Yes	No	No	2023/03/24	2023/04/23	Details Manage
Title IX, Sexual Misconduct, and Clery Act	Yes	No	No	2023/03/06	2023/04/05	Details Manage
FERPA TTUHSC ELP	No	No	No	2023/02/23	2023/04/24	Details Manage
2023 General Compliance Training	Yes	No	No	2023/01/17	2023/04/17	Details Manage
2023 Conflict of Interest	Yes	No	No	2023/01/13	2023/04/13	Details Manage
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12	2023/04/12	Details Manage
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05	2023/04/05	Details Manage
NESOP2 Site-Specific Training	Yes	No	Yes	2023/01/04	2023/01/04	Details Manage

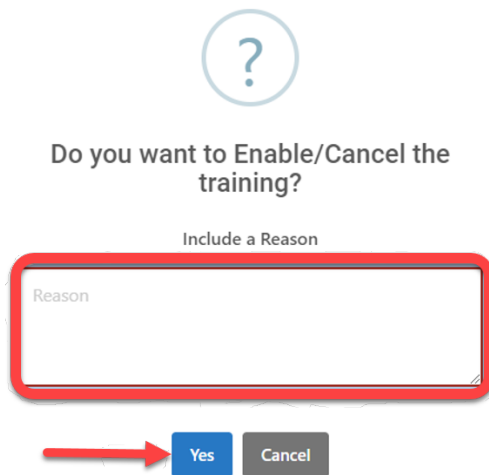
Showing 1 to 8 of 8 entries

Previous 1 Next


- a) Under the **Actions** section, you will have two options, first you can **Enable/Cancel Training** and second, you can give credit to an individual by clicking on the **Credit Training** button.



- 7) **Enable/Cancel Training:** If you click on this section a pop-up screen will appear. You will have to give the reason you want to cancel the training. After you are finish, click **Yes**.




- 8) **Credit Training:** If you click on this section a pop-up message will appear. You will have to include a reason you want to give credit for the training. After you are finish, click **Yes**.



Do you want to Credit/Un-credit the training?

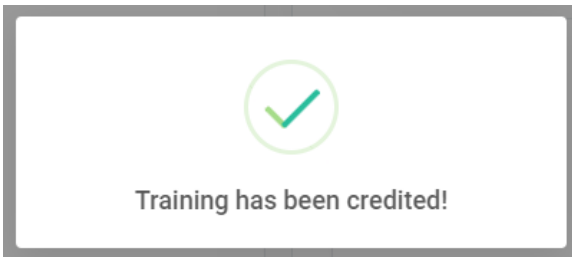
Include a Reason

User completed Conflict of Interest Training via MediaSpace on 1/19/23. LA



Note: Use the following template when including the reason; User completed (name of training) via MediaSpace or Canvas Catalog on (date). (Initials)”

a) Once you click on **Yes**, you will see the following pop-up notification.



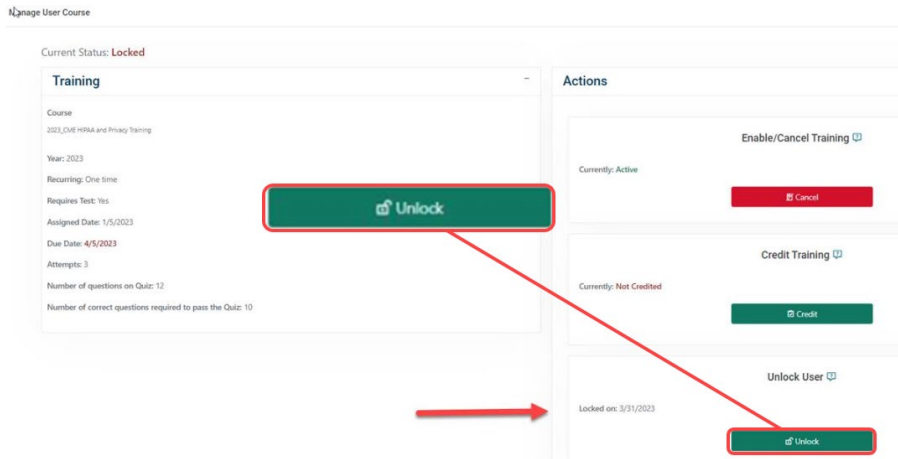
9) Next, under the **User Course** section you can verify if the credit was successfully applied to the training. Check for a **Yes** under the **Completed** section.

User Courses

Show entries

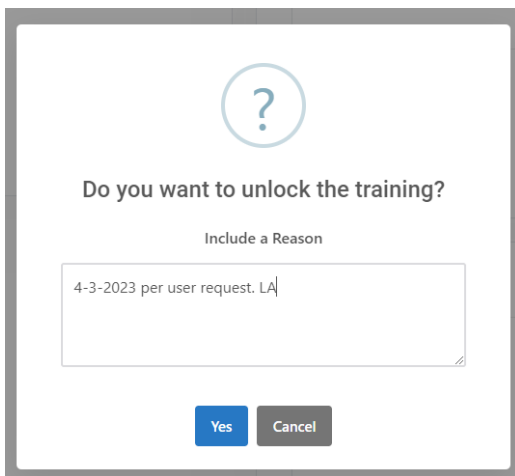
Course Title	Completed	Locked	Credit	Assigned Date
2023 General Compliance Training	Yes	No	No	2023/01/17
2023 Conflict of Interest	Yes	No	No	2023/01/13
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05

10) **Unlock User:** This option will display if the user has used all of their attempts and has not successfully passed the test, or if the user ran out of time. Click **Unlock**.

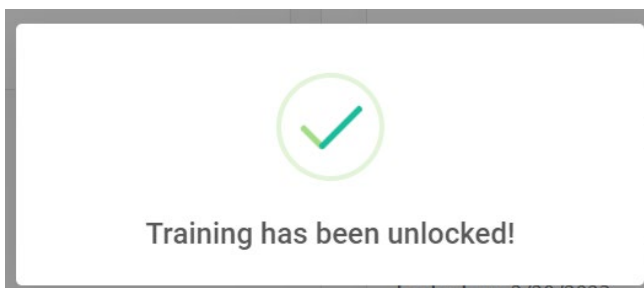


a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel**, if you made a mistake. Click **Yes** when you are ready.

- Make sure you enter a brief message before confirming **Yes**.



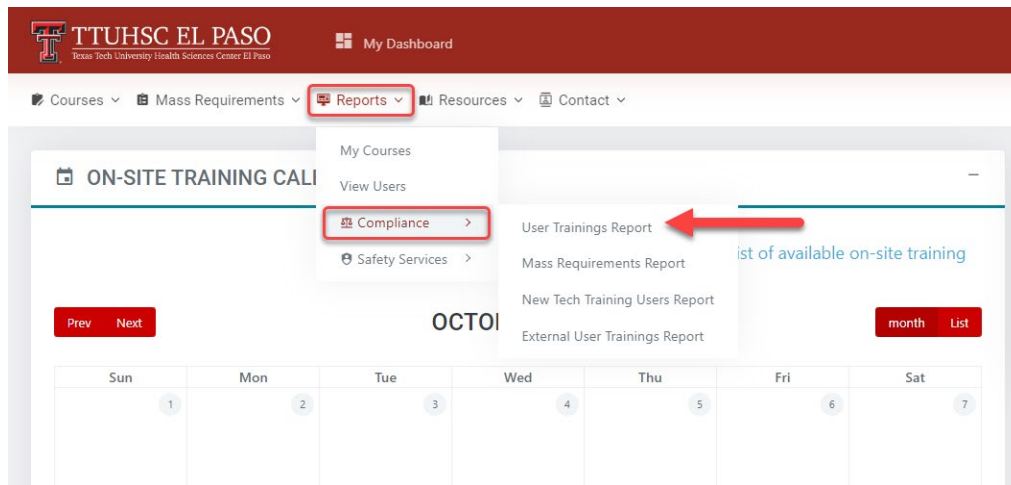
b) After you have clicked **Yes**, a pop-up notification will appear to confirm. You can go back to the **View User Report** to make sure the user was unlocked.



REPORTS – COMPLIANCE USER TRAININGS REPORT

The **User Training Report** will yield training completion information for all active users in Tech Training. The report includes the following fields: id, training, r number, eRaider, full name, email, termination date, start date, due date, course active, completed, credited, locked, attempts, grade, completed date, department, college, and position.

- 1) To pull a **User Training Report**, click on the **Reports** dropdown → **Compliance** → then click on **User Trainings Report**. You will see the following screen:



- 2) You will be redirected to the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

The screenshot shows the 'User Training Report' search criteria form. The form includes the following fields:

- Eraider** (a): A text input field with the value 'Eraider'.
- Date Range** (b): A date range input field with the value '01/01/2023 - 05/03/2023'.
- Training** (c): A dropdown menu with the value 'Select a course'.
- Training Status** (d): A radio button selection with options: All (selected), Completed, Credited, Locked, and Due.

A 'Search' button is located at the bottom of the form.

- a) **eRaider** – Enter the **individual's eRaider**. If you need to pull a report for all users, leave this field blank.

🔍 Search Criteria


Eraider

- b) **Date Range** – Click on this section to select the specific **date range** you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range

01/01/2023 - 05/03/2023

Jan 2023							Feb 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31	29	30	31	1	2	3	4
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	1	2	3	4
29	30	31	1	2	3	4	5	6	7	8	9	10	11

01/01/2023 -  **Apply**

- c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.

Training

Select a course

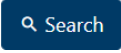
Select a course

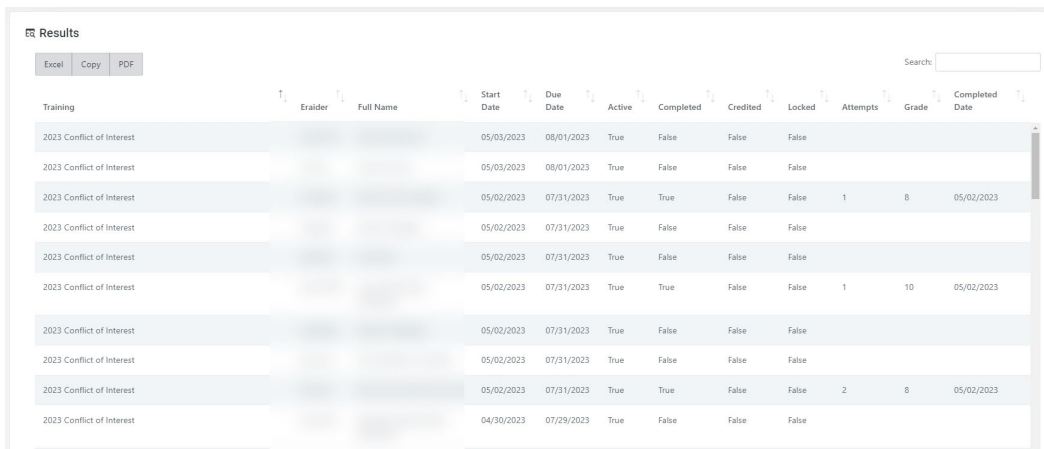
- 2023 Conflict of Interest
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training**

- d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, click on the radio button **All**.

Training Status

All Completed Credited Locked Due

- 3) Once you have completed all the fields, click on the  button.
- 4) When you click **Search**, the report will populate in the **Results** section at the bottom of the screen.

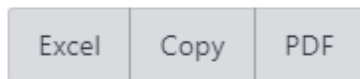


The screenshot shows the 'Results' section of a training report. At the top left, there are three buttons: 'Excel', 'Copy', and 'PDF'. To the right is a search bar. Below these is a table with the following columns: Training, Eralder, Full Name, Start Date, Due Date, Active, Completed, Credited, Locked, Attempts, Grade, and Completed Date. The table contains ten rows of data, all for '2023 Conflict of Interest' training. The 'Active' column is 'True' for all rows. The 'Completed' column is 'True' for two rows and 'False' for the others. The 'Attempts' column shows values of 1, 8, and 10 for some rows. The 'Completed Date' column shows '05/02/2023' for several rows.

Training	Eralder	Full Name	Start Date	Due Date	Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	8	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	10	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	2	8	05/02/2023
2023 Conflict of Interest			04/30/2023	07/29/2023	True	False	False	False			

- 5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

Results

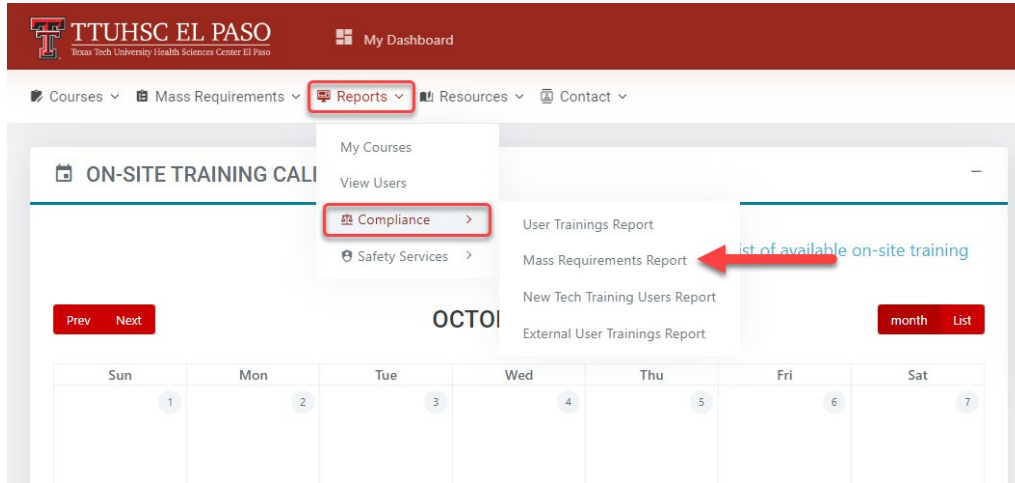


- 6) Once you have downloaded your report, save the **User Training Report** to your desired location.

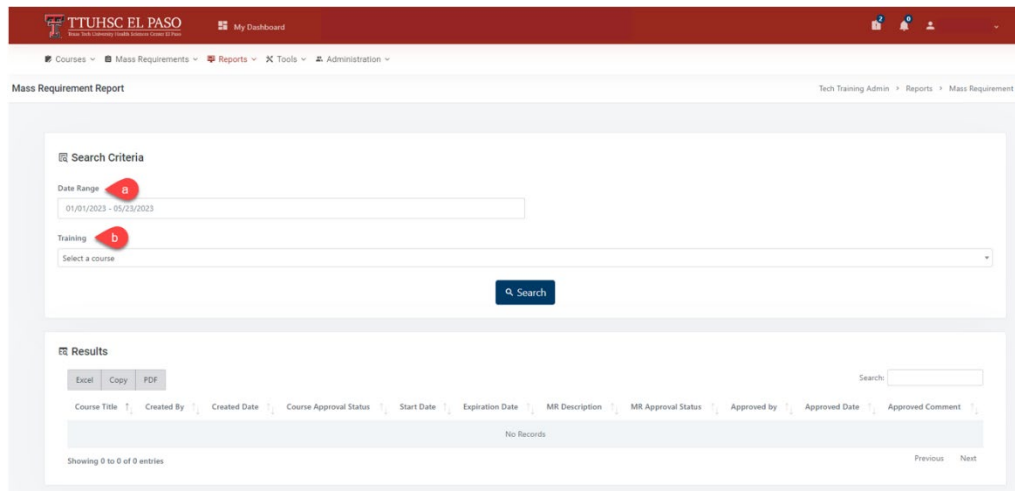
REPORTS – COMPLIANCE MASS REQUIREMENTS REPORT

The **Mass Requirements Report** will yield training course information for all course that have been uploaded into Tech Training. The report includes the following fields: course title, created by, created date, course approval status start date, expiration date, MR description, MR approval status, approved by, approved date and approved comment.

- 1) To pull a **Mass Requirements Report**, click on the **Reports** dropdown → **Compliance** → then click on **Mass Requirements Report**.



- 2) When you click on **Mass Requirement Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:




- a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range

01/01/2023 - 05/03/2023

Jan 2023							Feb 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31	29	30	31	1	2	3	4
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	1	2	3	4
29	30	31	1	2	3	4	5	6	7	8	9	10	11

01/01/2023 -  **Apply**

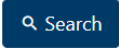
- b) **Training** – you will need to select a course in the **Training** field dropdown. If you need to pull a report that shows all training courses, you may leave this field as **Select a course**.

Training

Select a course

Select a course

- 2023 Conflict of Interest
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training**

- 3) Once you have completed all of the required fields, click on the  button.
- 4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

Results

Excel Copy PDF Search:

Course Title	Created By	Created Date	Course Approval Status	Start Date	Expiration Date	MR Description	MR Approval Status	Approved by	Approved Date	Approved Comment
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	01/24/2024	for research and IRIS purpose	Approved		01/24/2023	Committee has already approved the training. Assigned training for individual is approved. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Denied		03/30/2023	Testing. Not approved. Look at your course information. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/31/2023	03/31/2024	This is for testing purposes.	Approved		04/13/2023	Testing approval yqc
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/13/2023	12/31/2023	COI training is required by policy 10.50. Regents' Rules chapter 3.1 and Texas Government Code 572	Approved		01/13/2023	Approve yearly course
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes.	Approved		03/29/2023	Force Mass Requirement

- 5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

Results

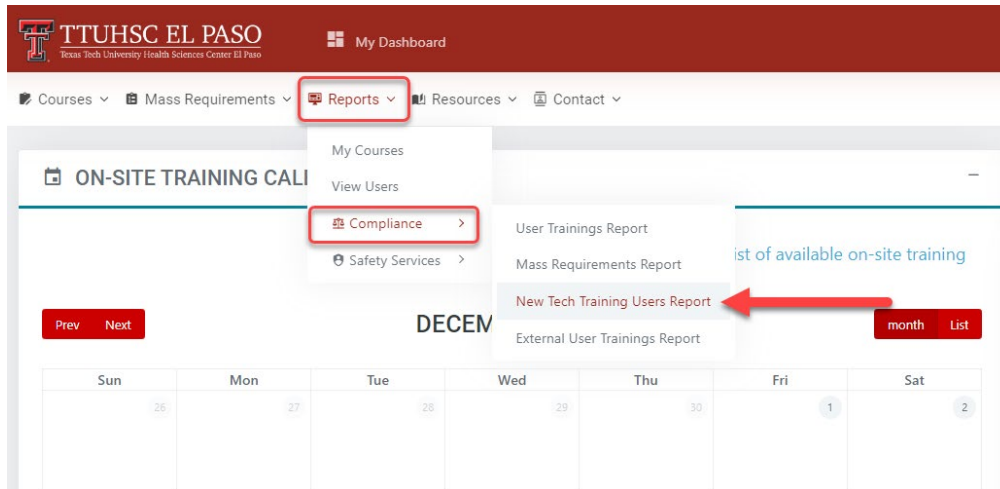
Excel Copy PDF

- 6) Once you have downloaded your report, make sure to save the **Mass Requirement Report** to your desired location.

REPORTS – COMPLIANCE NEW TECH TRAINING USERS REPORT

The **New Tech Training Users Report** is utilized to verify the number of employees hired by date range.

- 1) To pull a **New Tech Training Users Report**, click on the **Reports** dropdown → **Compliance** → then click on **New Tech Training Users Report**.



- 2) When you click on **New Tech Training Users Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:


The screenshot shows the 'Search Criteria' section of the system interface. It contains two main fields: 'Date Range' and 'User Type'. The 'Date Range' field is highlighted with a red circle 'a' and contains the text '04/23/2023 - 05/23/2023'. The 'User Type' field is highlighted with a red circle 'b' and contains three radio button options: 'All' (selected), 'Employees', and 'Students'. A 'Search' button is located at the bottom right of the section.

- a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range

01/01/2023 - 05/03/2023


Jan 2023							Feb 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31	29	30	31	1	2	3	4
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	1	2	3	4
29	30	31	1	2	3	4	5	6	7	8	9	10	11

01/01/2023 -  **Apply**

b) **User Type** – If you want to see a specific User Type, select either All, Employees or Students.

User Type

All Employees Students

- Once you have completed all of the required fields, click on the  button.
- When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

Results

Excel Copy PDF Search:

Eralder	UserName	Email	User Type	Department	Position	College	Imported Date
			Employee	Transmountain Practice Surgery ELP	Clinical Assistant		03/06/2023
			Student			ME	03/06/2023
			Employee	Clinical Operations OB/GYN	Patient Services Specialist		03/05/2023
			Employee	Orthopaedics ELP	Advance Practice Provider - NP		03/05/2023
			Employee	Human Resources ELP	HR Generalist ELP		03/03/2023
			Employee	Payment Services ELP	Analyst II		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Professor- General Dentistry		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Dental Dispensing Assistant		03/03/2023
			Employee	Faculty Development ELP	Analyst II		03/03/2023
			Employee	Clinical Operations NEURO	Medical Clinic Supervisor- ELP		03/03/2023
			Employee	Office of Global Health Affairs ELP	Coordinator		03/03/2023

- 5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

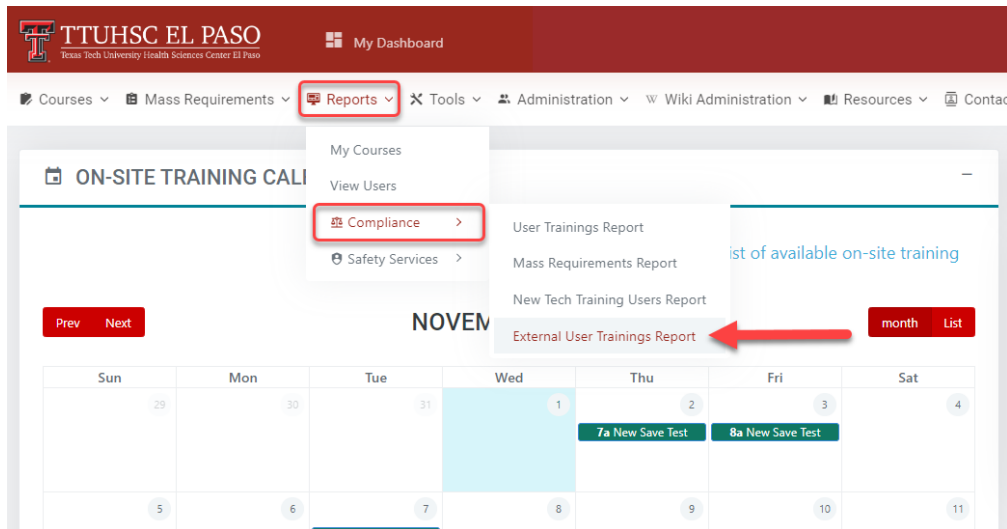
Results

Excel Copy PDF

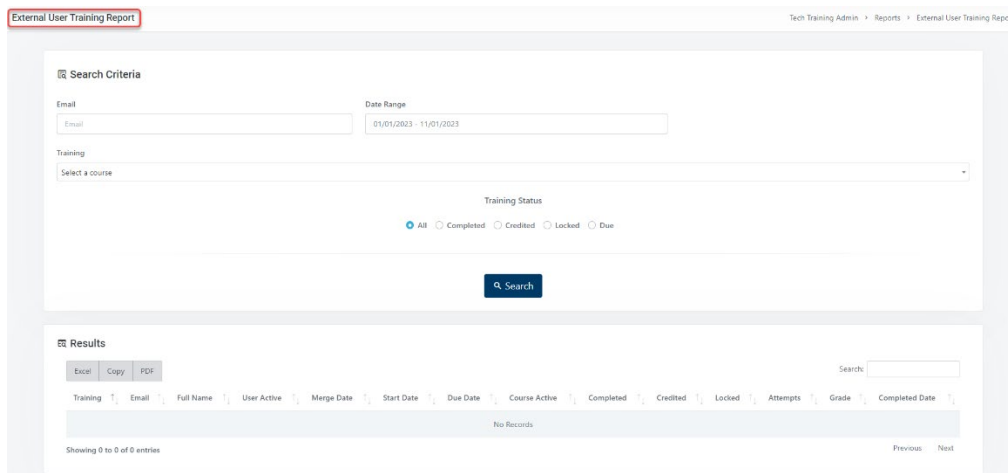
REPORTS – COMPLIANCE EXTERNAL USER TRAININGS REPORT

The External User Trainings Report will show the user the training information for the External Users.

- 1) To download the External Users Training Report, go to the **Reports** tab at the top of the page > **Compliance** and click on **External User Trainings Report**.

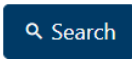


- 2) This will take you to the **External User Training Report** page.



- 3) In the **Search Criteria** section, fill out the following fields:
 - a) **Email** – Enter the **individual's personal email**. If you need to pull a report for all users, leave this field blank.
 - b) **Date Range** – Select the desired date range.

- c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.
- d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.

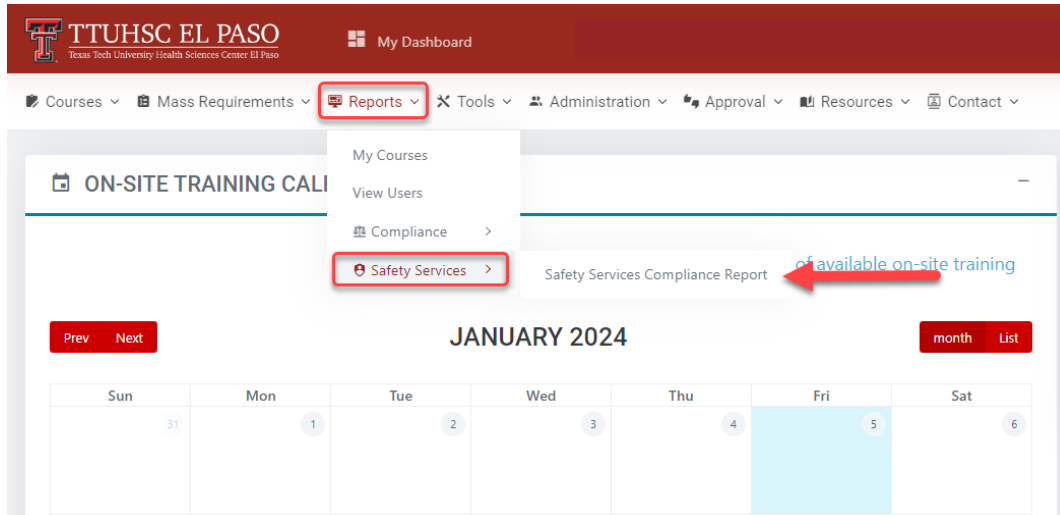
- 4) After you have filled out all the fields, click on the  button.
- 5) The **Results** section will populate with all the External User Trainings information. Click on the **Excel**, **PDF** or **Copy** option to download or save the report.

Training	Email	Full Name	User Active	Merge Date	Start Date	Due Date	Course Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			Yes		09/22/2023	11/21/2023	Yes	Yes	No	No	1	9	09/22/2023
2023 Conflict of Interest			Yes		04/14/2023	06/13/2023	Yes	No	No	Yes	3		
2023 General Compliance Training			Yes		09/22/2023	11/21/2023	Yes	No	No	No			
2023, Students HIPAA and Privacy Training			Yes		09/22/2023	11/21/2023	Yes	No	No	No			
3			Yes		09/19/2023	11/18/2023	Yes	No	No	No			
3			Yes		09/15/2023	11/14/2023	Yes	No	No	No			
3			Yes		04/14/2023	06/13/2023	Yes	Yes	No	No	0	10	09/15/2023
Basic Informed Consent Training			Yes		09/19/2023	11/18/2023	Yes	No	No	No			

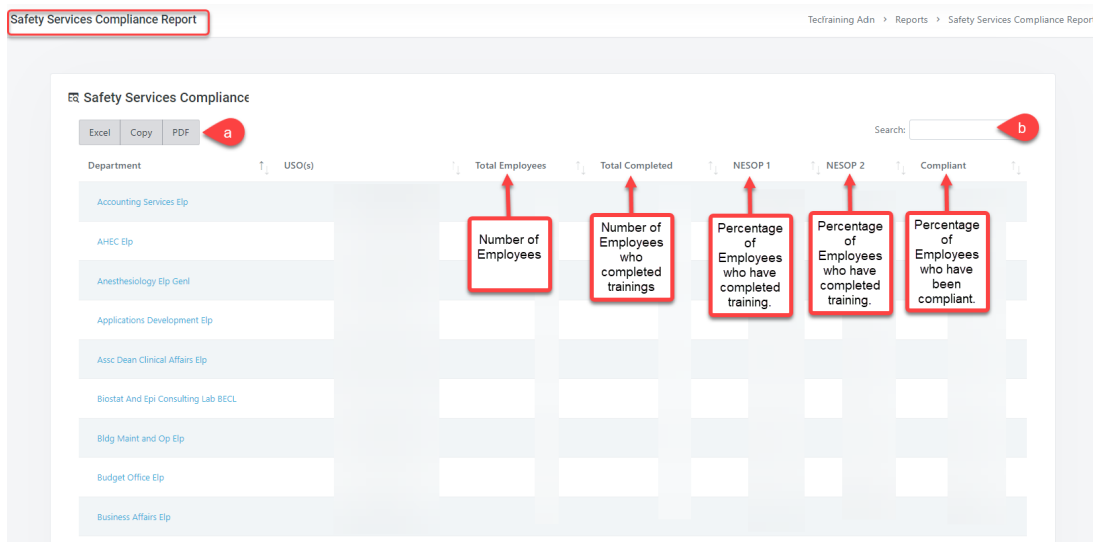
REPORTS – SAFETY SERVICES COMPLIANCE REPORT

For more information on Safety Services content, please contact the Safety Services Department at safetyserviceselp@ttuhsc.edu or call 915-215-4823.

- 1) Go to the **Reports dropdown**, click **Safety Services** and go to **Safety Services Compliance Report**.



- 2) Next, you will see the **Safety Services Compliance Report** screen.

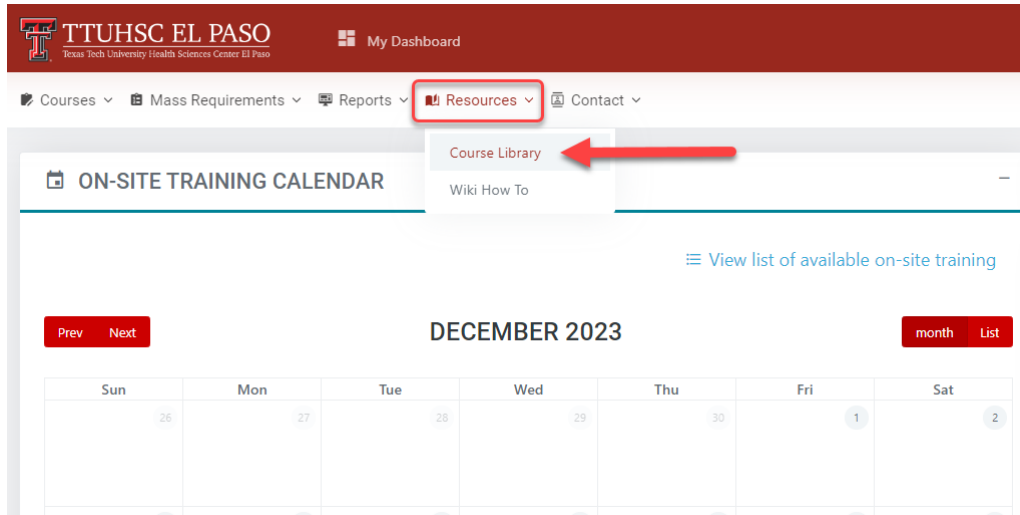


- a) In this section, you will have the option to export the document into **Excel** or **PDF** or **Copy** the document.
- b) You have the **Search** bar where you can look up a department by its name.

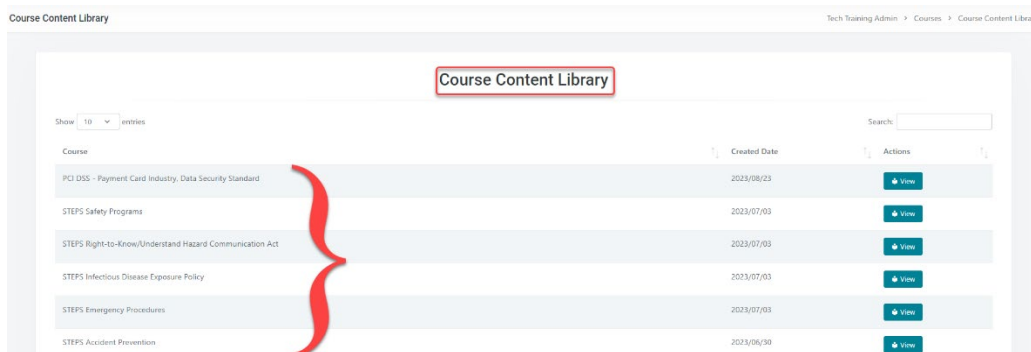
RESOURCES – COURSE LIBRARY

This function will allow the user to see and download the training content without having to retake the course.

- 4) To go to the **Course Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



- 5) This will take you to the **Course Content Library** screen. In this page, you will be able to see all the trainings that have been uploaded.



- b) Click on the  button to view the content for your desired training(s).

- 6) Next, you will see the **Course Content** page which allows you to see the details for that training.

- b) You can also download the **Course Files** for that course.

PCI DSS - Payment Card Industry, Data Security Standard

Course Details

Alternate Title

PCI DSS - Payment Card Industry, Data Security Standard

Course Description

This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.

Objectives

Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.

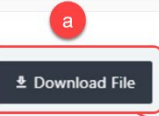
Outline

- What is PCI DSS?
- Third-Party Vendors
- PCI DSS Requirements
- Security Features
- Record Retention
- Processing Payment Cards
- Precautions
- Incident Response
- SAQ
- Taking Payments Over the Phone
- Policies and Procedures

Course Files

PCI DSS - Payment Card Industry, Data Security Standard

File Descriptions:
PowerPoint Presentation

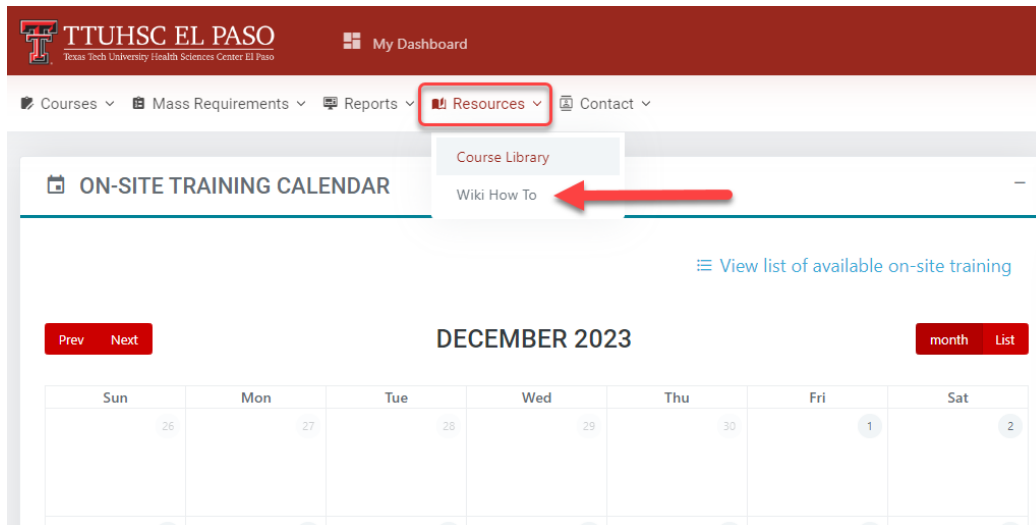


RESOURCES – Wiki How To

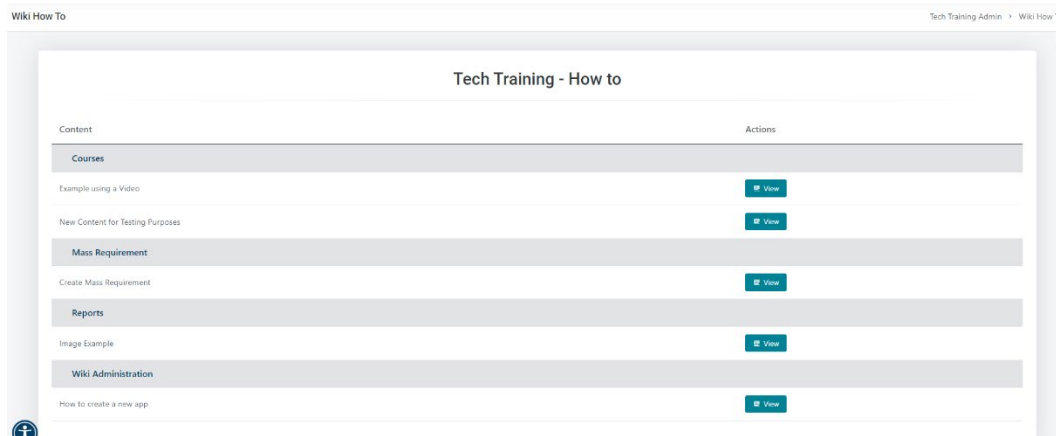
This feature will allow the user to see instructional videos, images or documents on different functions within the Tech Training application.

Note: Functions available vary depending on the user's role.

- 1) Go to the **Resources** dropdown at the top of the page and click on **Wiki How To**.



- 2) This will take you to the **Wiki How To** page. In the **Tech Training – How to** section you can see the instructional videos, documents, and images on various topics.



- 3) To see a specific section, click on the **View** button next to the name of the desired topic. This will display the content for that section.

Content View

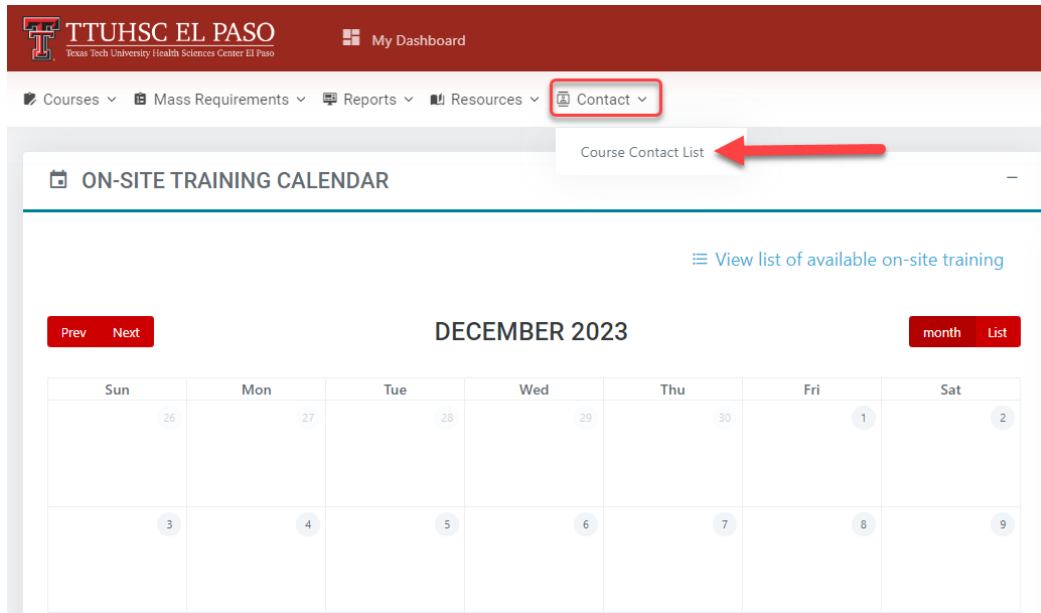
Example using a Video

The screenshot shows a 'Content View' interface. On the left is a 'Wiki Details' sidebar with the following information: Application: Tech Training, Category: Courses, Created By, Created Update Date: 8/29/2023 3:16:30 PM, Updated By, and Last Update Date: 9/26/2023 11:29:46 AM. The main area is titled 'Wiki Content' and contains 'EXAMPLE VIDEO 1'. The video player shows a black screen with a white exclamation mark icon and the text 'Video unavailable' and 'Watch on YouTube'. Below the video player is the text 'TEST 2'.

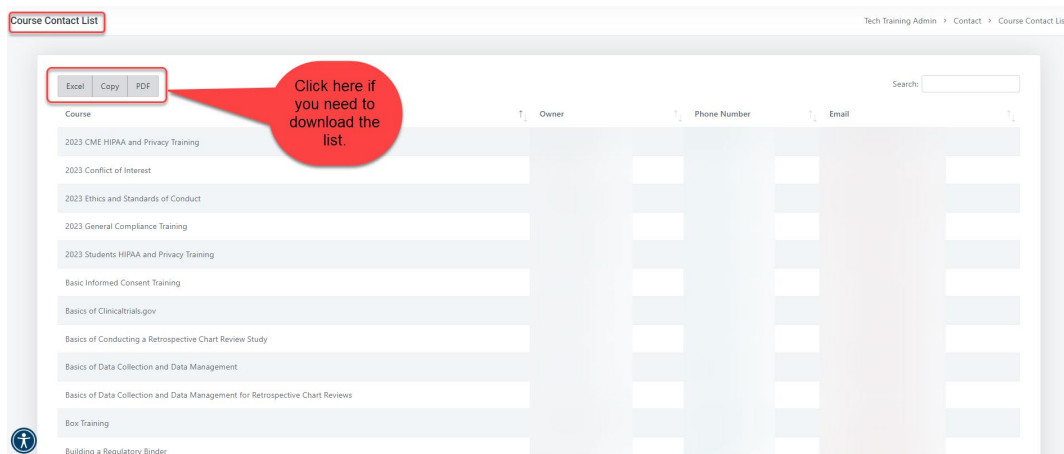
CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

- 3) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.



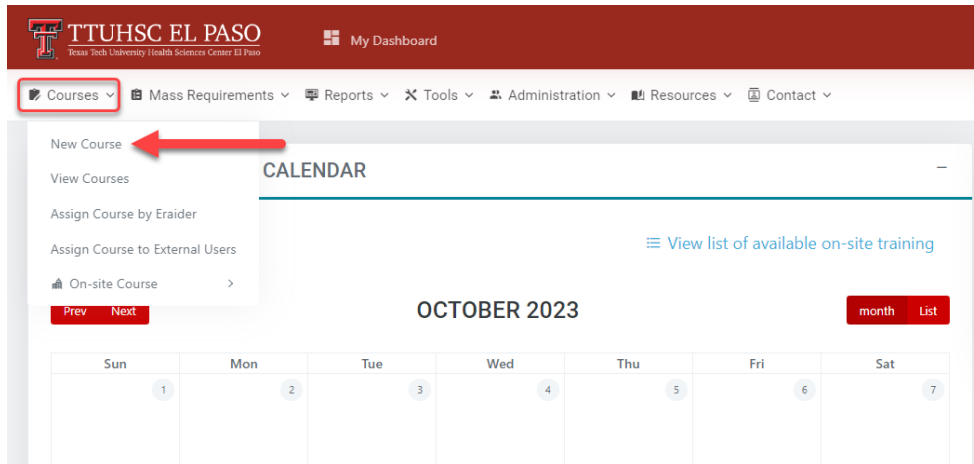
- 4) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number and email.



ADMINISTRATOR ROLE – FUNCTIONS

COURSES – NEW COURSE

- 1) To create a course, go to the **Courses** dropdown from the left-hand corner and click on **New Course**.



- 2) You will be directed to the **New Course Wizard** screen. First step is the **Course Configuration** tab.
 - a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*)*.
 - Under **Departments**, you can choose all departments or choose a specific department.
 - For **External URL**, use this only if course will have an external source attached. (For example, utilizing YouTube videos or external sites outside of TTUHSC EP website.)
 - b) Assure the **Course is Active** and **Certificate on Completion** toggle buttons under **Configuration settings** are **blue**. This will make them active.

c) Once the information is completed, click on the **Next step →** button to proceed.

3) You will be directed to the next tab, **Course Details**. See below:

a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*

b) Then click on the **Next step →** button to proceed.

- **Course Description** – enter a short description of the course.
- **Objectives** – outline the goals for the user upon the completion of this course.
- **Outline** – enter a general description of the course content and instructions.
- **Lockout Message** – enter contact information of person that can unlock the training for user.

New Course Wizard

Course Configuration
Course Details
Course Files
Course Questions
Request Form
Finish

Course Details

* Course Description

← Paragraph B I

0 WORDS POWERED BY TINY

* Objectives

← Paragraph B I

0 WORDS POWERED BY TINY

* Outline

← Paragraph B I

0 WORDS POWERED BY TINY

* Lockout message

← Paragraph B I

0 WORDS POWERED BY TINY

← Return
Next step →

- 4) Under **Course Files** tab, you will be able to upload the desired files. There is no limit to the number of files you wish to upload.
 - a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*)*.
 - b) Ensure the **Required** toggle button at the bottom left hand corner of the page is **blue**. This will make downloading the course files a requirement.

Course Configuration Course Details **Course Files** Course Questions Request Form Finish

Course Files

Course File Notes:

- Files are optional, but if a file needs to be added all fields will be required
- Remember to click on **Upload file** to save it in the server.

* File

Choose File No file chosen

* File Name

File Name

* File Description

File Description

Requires file to be downloaded by user?

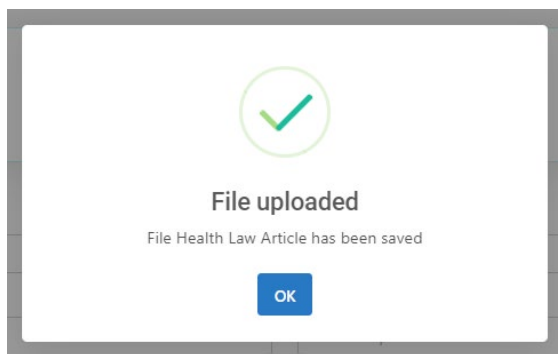
Required Required

Upload File

Files Uploaded

5) Once the files have been uploaded, click **Upload Files**.

a) A pop-up box will appear. Click **Ok**.



6) You may continue uploading additional files. If you are finished, click on **Next step →** to proceed.

7) You will be directed to **Course Questions** tab. This is a two-step process.

a) First, answer **1. If a test is required**, check the **Requires test?** checkbox.

Course Questions

Course Question Notes:

- if the course requires a quiz please check **Requires test** and click save and continue in order to proceed to next step Add questions
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the Number of questions field

1- Test required **Requires test?**

2- Add Questions

* Number Of Attempts: 0

* Number Of Questions: 0

* Number Of Correct Answers: Number of correct answers

Configuration Settings

Random Questions

Save and continue

[← Return](#) [Next step →](#)

8) Next, you will need to fill in the following fields:

- a) **Number of Attempts** – this field determines how many times the user is allowed to take the test before being locked out.
- b) **Number of Questions** – this field will determine how many questions the user will receive each time the test is taken.
- c) **Number of Correct Answers** – this field will determine the number of questions that must be answered correctly to pass the test.
- d) You will have the option to choose **Random Questions**. It is recommended that you select **Random Questions** so that the user receives a new shuffled set of questions when retaking a test. If you don't choose **Random Questions**, the questions will appear in the same order each time the user initiates the test.

Course Question Notes:

- If the course requires a quiz please check Requires test and click save and continue in order to proceed to next step Add questions
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the Number of questions field

1. Test required Requires test?

2. Add Questions

* Number Of Attempts: 3

* Number Of Questions: 1

* Number Of Correct Answers: 1

Configuration Settings

Random Questions

Save and continue

Return

Next step →

9) When the information has been entered in Step 1, click on **Save and continue** button at the bottom of the screen. Then click on **Next step** .

Course Question Notes:

- If the course requires a quiz please check Requires test and click save and continue in order to proceed to next step Add questions
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the Number of questions field

1. Test required Requires test?

2. Add Questions

* Number Of Attempts: 3

* Number Of Questions: 1

* Number Of Correct Answers: 1

Configuration Settings

Random Questions

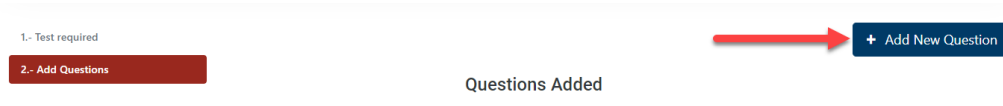
Save and continue

Return

Next step →

10) Next, you will be directed to the **2.-Add Questions** step.

- a) Click on **Add New Question** button to start adding questions.



11) This will take you to the section below. Fill out the **+ Add New Question** fields.

- a) **Answer Type** – There are two types of answers: single or multiple. Choose **single** if question only has one correct answer. Choose **multiple** if question has more than one correct answer.
- b) **Question** – The questions can be typed in, or you can cut and paste the questions from a word document. **DO NOT start a question with a number or a letter if you chose the Random Questions.**
- **Example: 1. Who is the President? or a. Who is the President?**
- c) **Objective** – This section may be left blank or you may add an objective. This is not a required field.
- d) **Media Content** – This section may be left blank if external URLs are not needed.

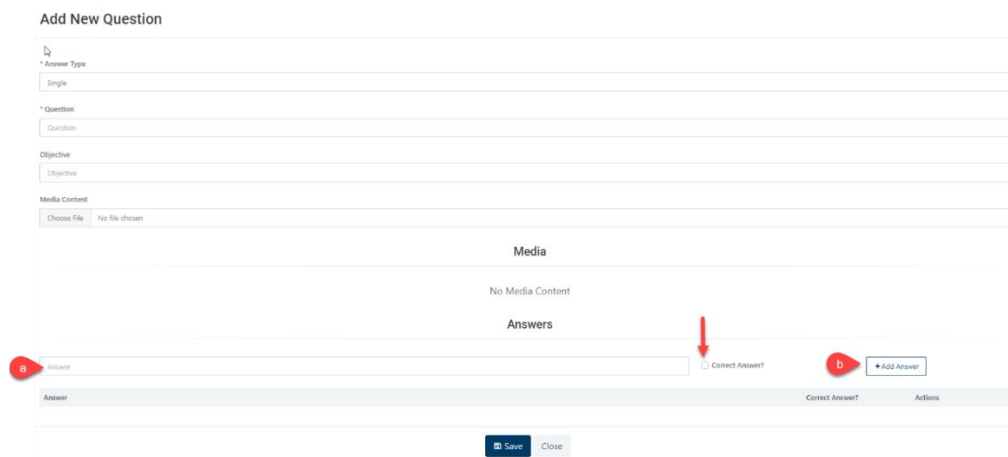
A screenshot of the 'Add New Question' form. The form has several sections: 'Answer Type' with a dropdown menu showing 'Single' (callout 'a'), 'Question' with a text input field (callout 'b'), 'Objective' with a text input field (callout 'c'), and 'Media Content' with a 'Choose File' button and 'No file chosen' text (callout 'd'). Below these is a 'Media' section with 'No Media Content' text. At the bottom is an 'Answers' section with a text input field, a 'Correct Answer?' checkbox, and an 'Add Answer' button. At the very bottom are 'Save' and 'Close' buttons.


12) Next, go to the **Answer** section:


- a) Type the first possible answer in the **Answer** field (you can also cut and paste the answers from a word document). If this is the correct answer, make sure to click on the **Correct Answer** check box.

b) If it is not the correct answer, click on the **+Add Answer box** to continue adding possible answers. **DO NOT start an answer with a number or a letter.**

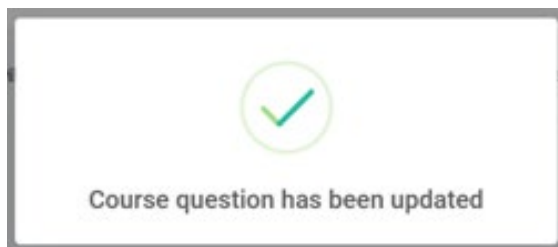
- Example: 1. True or a. True



13) Once you have entered all of the corresponding options for the questions, click on the  button at the bottom of your screen.

14) When you have successfully added the questions and answers and clicked on the  button, the following pop-up notification will appear:

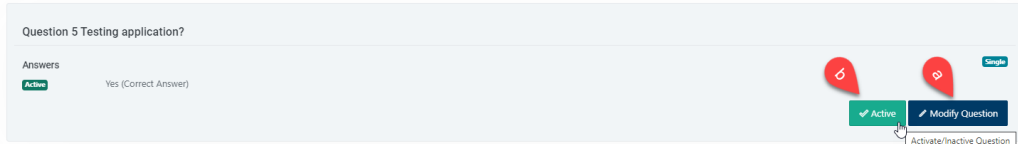
*Note: You will start seeing the questions you added under the **Questions Added** section.*



15) **Repeat steps 10 - 14 to continue adding questions.**

16) Verify that everything is correct before proceeding to the next step.

- a) If you need to make changes, click on **Modify Question**.
- b) You can **Activate/Inactivate** a question. For example, inactivate a question that was submitted in error or was a duplicate entry.



17) Once everything is correct, click on **Next step →** at the bottom of the page.

18) Next, you will be directed to the **Request Form** tab. This is the **Training Request Form** screen. All fields need to be filled in.

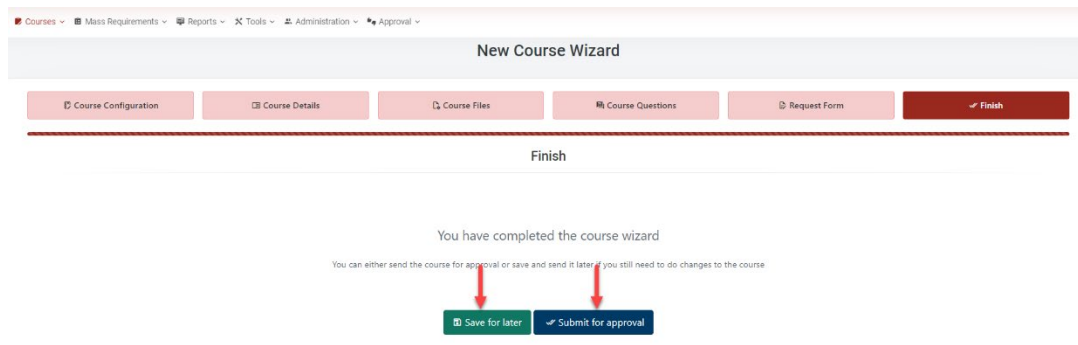
- **Submission Date** – Enter date when training is submitted.
- **Requesting Department** – Enter department that owns the training.
- **Lesson Name** – Enter full name of the course.
- **Name of Individual Submitting This Form** – Enter your full name and title.
- **Lesson Duration** – Enter the time it takes for user to complete the training.
- **Summation of Lesson** – Enter brief summary of training.
- **Requirement for Training** – (TJC, state statute, department requirement). Provide Citation if the requirement is statute or TJC.
- **Target Department** – Enter all office workers, clinical staff, everyone, etc.

- **Lesson Frequency** – Determine if training will be assigned one time, annually, bi-annually, etc.
- **Assignment Month** – Enter the date the course is going to be assigned to users.
- **Approval from the individual in your chain of command** that reports to the Dean of the President is required. Did you obtain their approval? Please list the name of this individual.

19) Once this form is completed, click on  at the bottom of the page.

20) The final step in the **New Course Wizard** is the **Finish** tab.

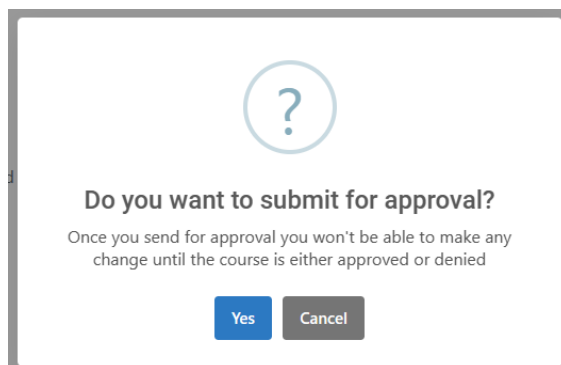
- a) In the **Finish** tab, you will have one of two options: **Save for later** or **Submit for approval**.



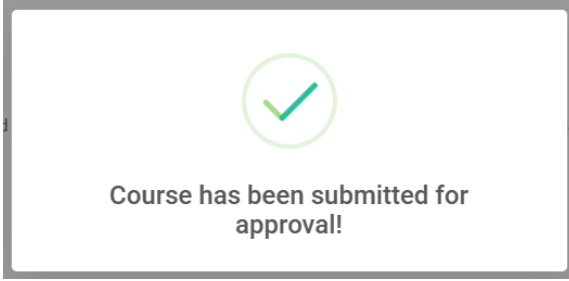
21) When you click the  option, you will see the following pop-up box:

- a) If you are ready to submit the course, click **Yes** to submit for approval.

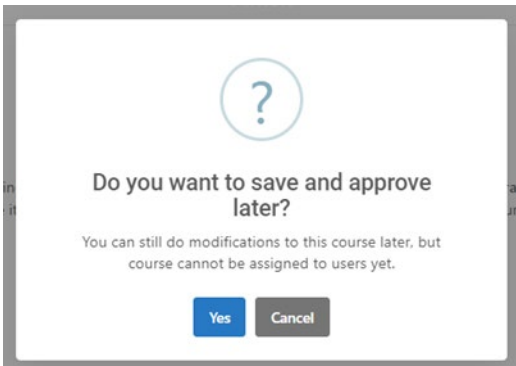
*Note: If you need to back to the **Finish** tab, click **Cancel**.*



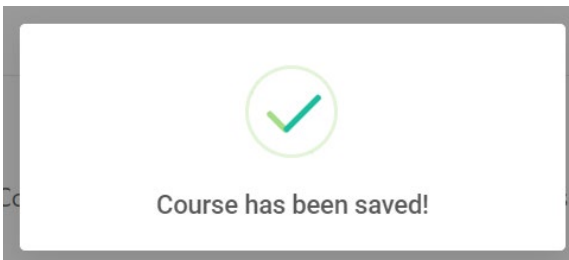
- b) Once you click **Yes**, you will see the pop-up screen below confirming the course has been submitted for approval:



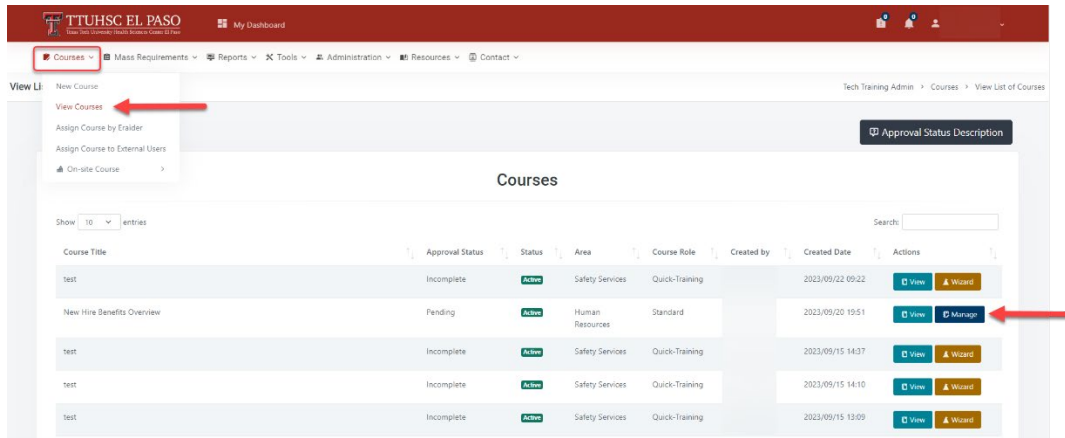
22) If you click on the **Save for later** option, you will see the pop-up box below. Click **Yes** to confirm. *Note: To go back to the Finish tab, click **Cancel**.*



a) When you click **Yes**, you will see the following pop-up box stating the training has been saved:



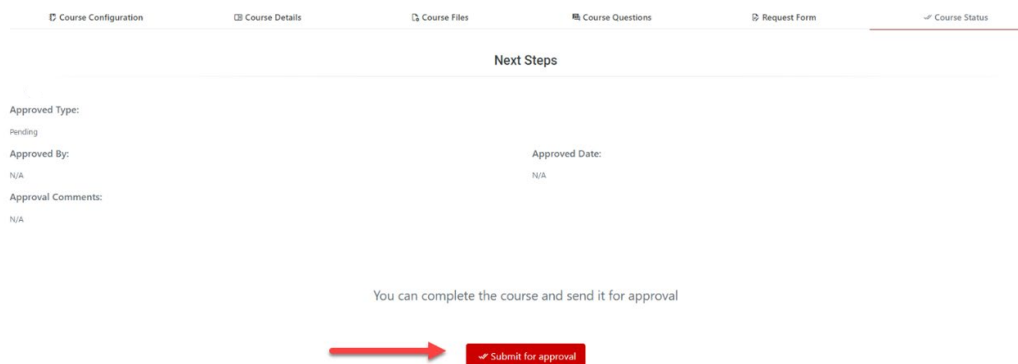
23) If you need to go back to a course that has been saved, click on the **Courses** → **View Courses** section to locate the training. The status under the **Actions** column will change to **Manage**. Click on the **Manage** button to open the training.



24) You will be directed to the **Course Configuration** screen. From here, you can click on any one of the tabs to **modify/update** the information.

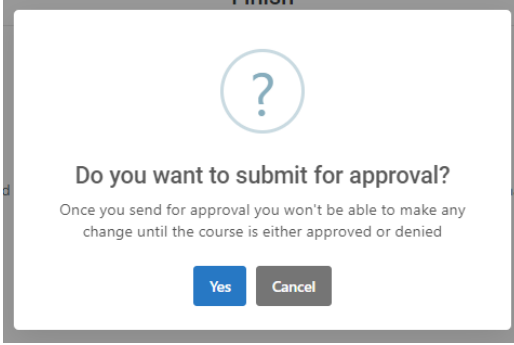
- If you **modify/update** information in one of the tabs, make sure to click on the **Save** button at the bottom of the page.

25) Once you have **modified/updated** the information, go to the **Course Status** tab and click on **Submit for Approval**.



26) When you click on **Submit for Approval**, you will see the pop-up screen below. You may choose to submit the course by selecting **Yes**, or choose **Cancel** to go back to the **New Course Wizard** screen.

27) If you choose **Yes**, you will get another pop-up box indicating the course has been submitted.



28) Once a course has been **submitted for approval**, an automated email will be sent to the Committee members.

29) When the course has been **approved/denied** by a Committee member, you will receive an automated notification via email.

- Example for when course has been approved:

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
Sent: Saturday, December 31, 2022 8:31 AM
To:
Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been **Approved**

Approved By:

Approved Date: 12/31/2022

Comments:

approve

- Example for when course has been denied:

Thu 3/30/2023 4:04 PM
no-reply@ttuhsc.edu
New course approval update

To
If there are problems with how this message is displayed, click here to view it in a web browser.

Dear :

The Course **Testing12** has been **Denied**

Approved By:

Approved Date: 3/30/2023

Comments:

Denied for testing purposes.

If you have any questions regarding the course approval process, please contact the committee for more details.

30) If the course is **denied** and changes need to be made, go to the **Courses** tab at the top-left side of the page. Click on the **View Courses** section, look for the course and click on the **View** button.

- a) In the **Course View** section, you can see the status of the course. If denied, Committee members will indicate the reason for denial under the **Approved Comment** section.

Course View

Approval Step: **Approved** Approved By: Approved Date: 1/13/2023 4:22 PM

Approved Comment:
I approve yearly course

Course Configuration

Course Type: ACME Year: 2023

Title
2023 Conflict of Interest

- 31) If changes need to be made, you can go to the **Manage** button on the right.

Courses

Show 10 entries

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Test	Incomplete	Active	Compliance	Standard		2023/04/14 11:15	View Withdraw
Testing1?	Denied	Active	Compliance	Standard		2023/03/30 16:00	View Manage
Endowment Training	Approved	Active	Compliance	Standard		2023/03/20 11:38	View Manage
Title IX Sexual Misconduct and Clergy Act	Approved	Active	Compliance	Standard		2023/02/23 09:30	View Manage
FERPA TTUHSC ELP	Approved	Active	Compliance	Standard		2023/02/21 08:00	View Manage
Competency for Reporting Abuse and Neglect for Ob/Gyn Staff Only	Approved	Active	Compliance	Standard		2023/02/21 14:02	View Manage
FERPA	Approved	Active	Compliance	Standard		2023/02/16 14:01	View Manage

[Manage](#)

- 32) Once you made all necessary edits, you may go to the **Course Status** tab and resubmit the course for approval. (The course will be rerouted to the Committee for approval.)

[Course Configuration](#)
 [Course Details](#)
 [Course Files](#)
 [Course Questions](#)
 [Request Form](#)
 [Course Status](#)

Next Steps

Approved Type:
Denied

Approved By: Approved Date:
3/30/2023 4:03 PM

Approval Comments:
Denied for testing purposes.

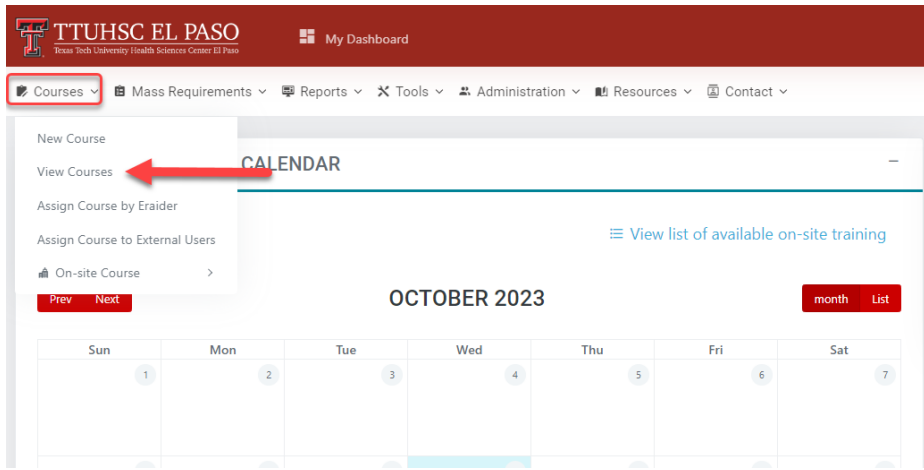
You can complete the course and send it for approval

[Submit for approval](#)

Note: The training owner will need to resubmit the course each year for Committee approval.

COURSES – VIEW COURSES

- 1) To review courses, click on the **Courses** dropdown menu then click on **View Courses**.



- 2) In the **View Courses** section, you will see a list of all the courses that have been submitted and their **Course Status**.

Show entries

Course Title	Approval Status	Status	Area	Course Role
What is IRIS and How Do I get an Account?	Approved	Active	Compliance	Standard
Human Trafficking Policy and Awareness	Approved	Active	Compliance	Standard
Test	Pending	Inactive	Compliance	Standard
Contract and Procurement Training	Incomplete	Active	Compliance	Standard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard
Cash Fund Training	Approved	Active	Compliance	Standard
Cash Fund Training	Incomplete	Active	Compliance	Standard
2023 Conflict of Interest	Approved	Active	Compliance	Standard
2023 General Compliance Training	Approved	Active	Compliance	Standard
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard

Showing 161 to 170 of 188 entries

- 3) The following are the **Course Approval Status Descriptions**:

Course Approval Status Description	
Incomplete	The course has not been configured completely
Pending	The course was saved for later but can still be modified
Completed	The course was submitted for approval
Approved	The course was approved by the committee
Denied	The course was denied by the committee

Close

4) You can also **View**, **Manage** or go to the **Wizard** option for the course.

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Contract and Procurement Training	Incomplete	Active	Compliance	Standard		2023/02/07 12:12	View Wizard Manage
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard		2023/01/18 10:57	View Manage
Cash Fund Training	Approved	Active	Compliance	Standard		2023/01/11 15:51	View Manage
Cash Fund Training	Incomplete	Active	Compliance	Standard		2023/01/11 15:42	View Wizard
2023 Conflict of Interest	Approved	Active	Compliance	Standard		2023/01/11 09:41	View Manage
2023 General Compliance Training	Approved	Active	Compliance	Standard		2023/01/11 09:14	View Manage
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard		2023/01/09 16:14	View Manage

a) If you click the **View** option, you will be able to see a full description for the course when you submitted it.

b) If you click the **Wizard** option, you will be able to update/correct anything from the course. This option will be available when the status is incomplete.

c) If you click the **Manage** option, you will be able to update/correct anything from the course. This option will be available when the course has been submitted and if denied, you will use this option.

5) When the course has been **approved/denied** by a Committee member, you will receive an automated email notification.

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
 Sent: Saturday, December 31, 2022 8:31 AM
 To:
 Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been **Approved**

Approved By:

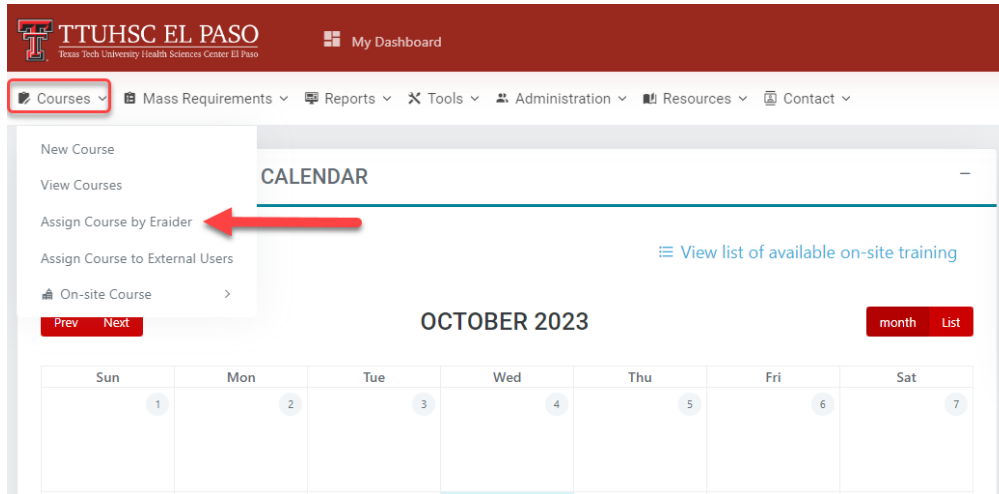
Approved Date: 12/31/2022

Comments:

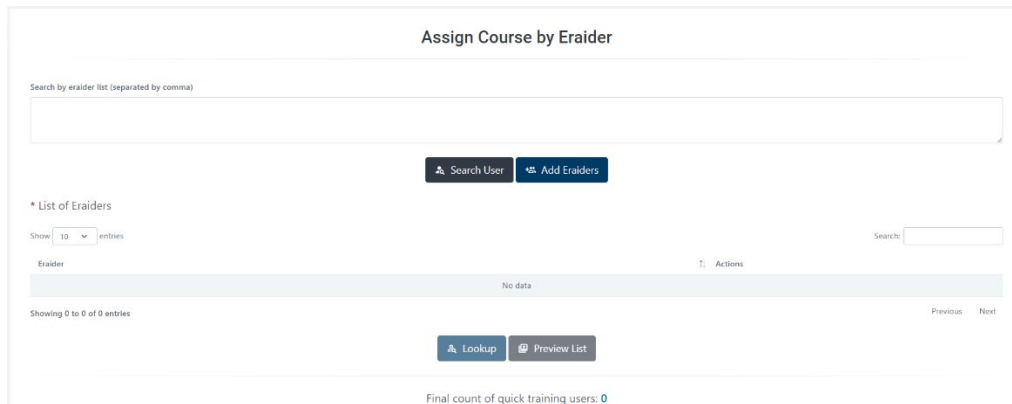
approve

COURSES – ASSIGN COURSE BY ERAIDER

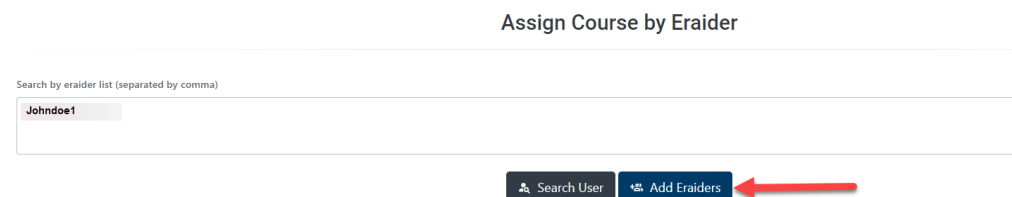
- 1) To assign a course by eRaider, click on **Courses** dropdown section, located on top of the page, then click on **Assign Course by eRaider**.



- 2) This will take you to the **Assign Course by eRaider** page.

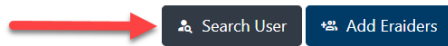


- 3) In the **Search by eRaider list** section, you can enter each eRaider individually (separated by commas). After you have entered all eRaiders that require training, click on **Add eRaiders** box at the bottom of the page.

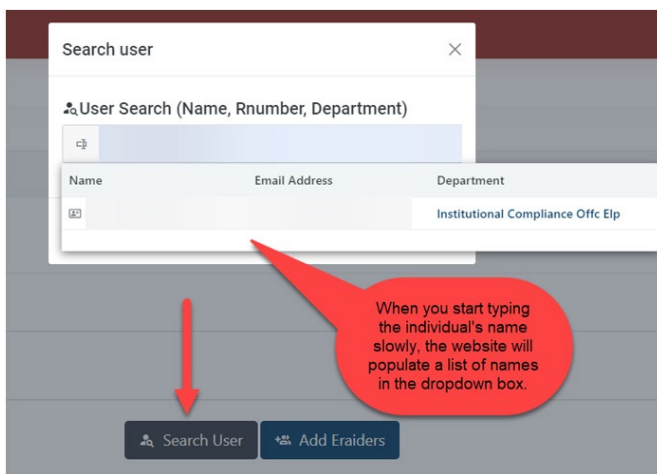


- 4) If you do not know the eRaiders for the individuals that require training, you can look up the individual at the **Search User** box.

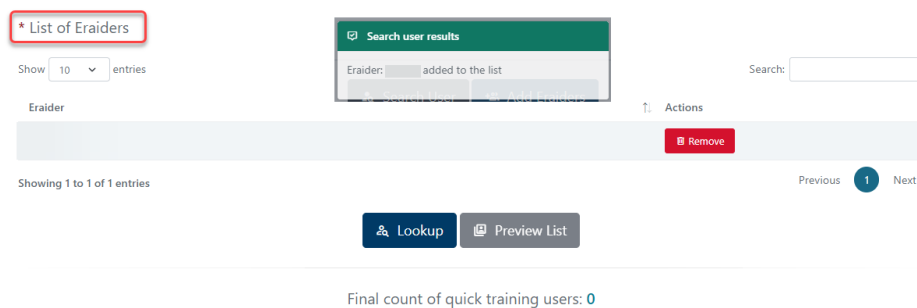
Assign Course by Eraider



- 5) When you use the **User Search** box, a pop-up window will appear. In this section you can search by **name**, **r number** or **department**. You will have a dropdown list of names to choose from.

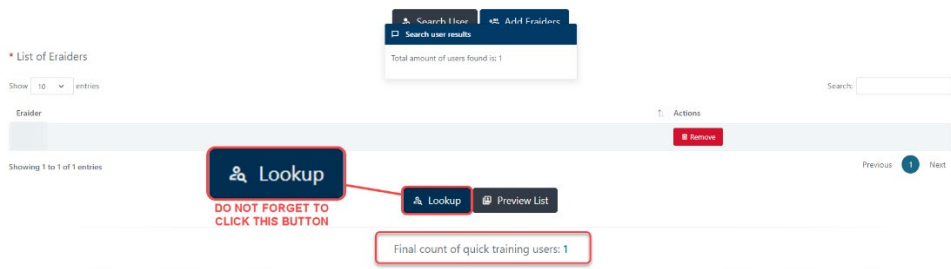


- 6) When you select the individual's name a pop-up screen will appear, after that, their eRaider will be added to the **List of eRaiders** section.

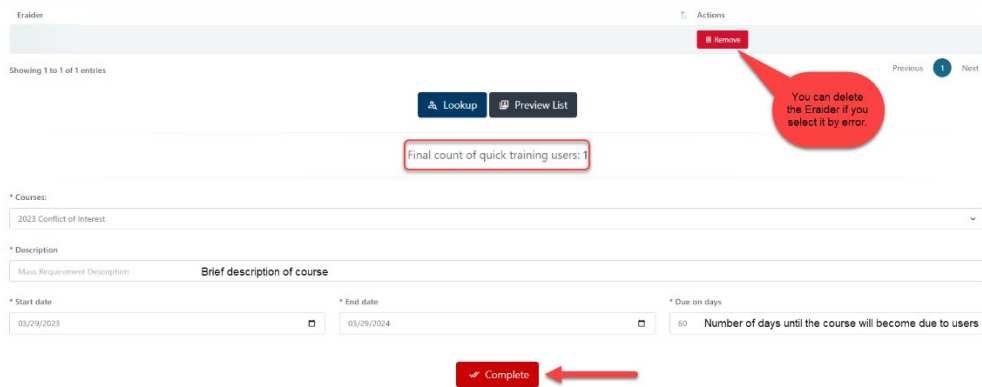


- 7) After making the selection of the users, click on the **Lookup** button. This will give you a count of the users that will have the course assigned.

- If you click on the **Preview List** button, you will see a list of the users that have been selected.

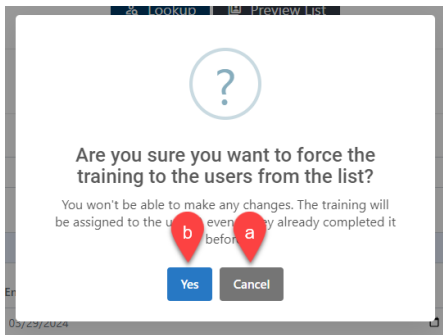


8) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Complete**.

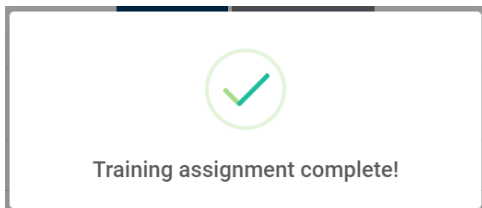


9) Next, a pop-up window will appear.

- a) Click **Cancel** to stay on **Assign Course by Eraider** section.
- b) Click **Yes** to proceed.



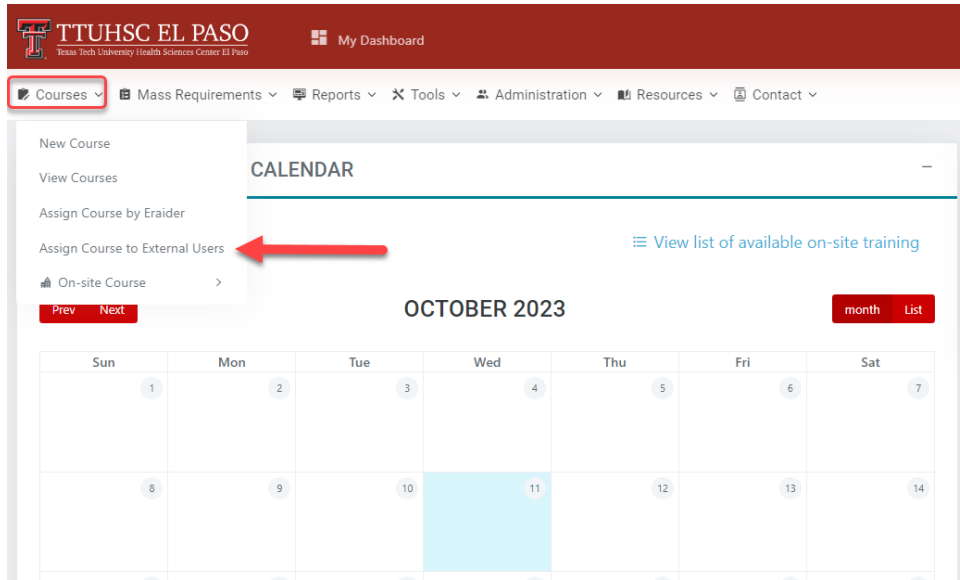
10) A pop-up notification will appear to confirm your submission.



COURSES – ASSIGN COURSE TO EXTERNAL USERS

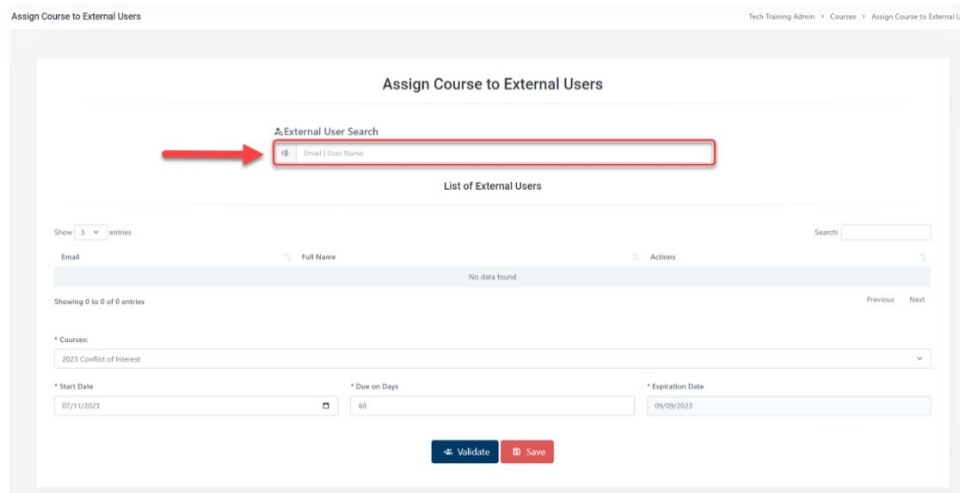
- 1) To assign a course to an external user, click on **Courses** dropdown section, located on top of the page, then click on **Assign Course to External Users**.

Note: Remember, this feature is only available for an existing external user. If the external user hasn't been created, refer to the [Manage External Users](#) section.



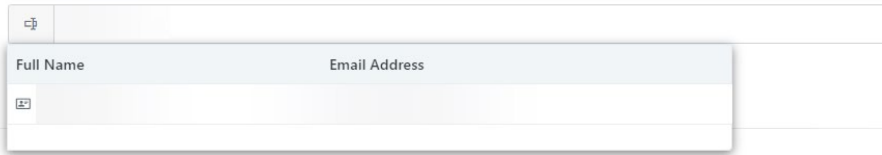
- 2) This will take you to the **Assign Course to External Users** page.

Note: This option will allow you to search by email, last name or first name only.



- 3) Next, type the name or email of the external user in designated field. A list of names will appear in a dropdown box. Click on the name of the individual.

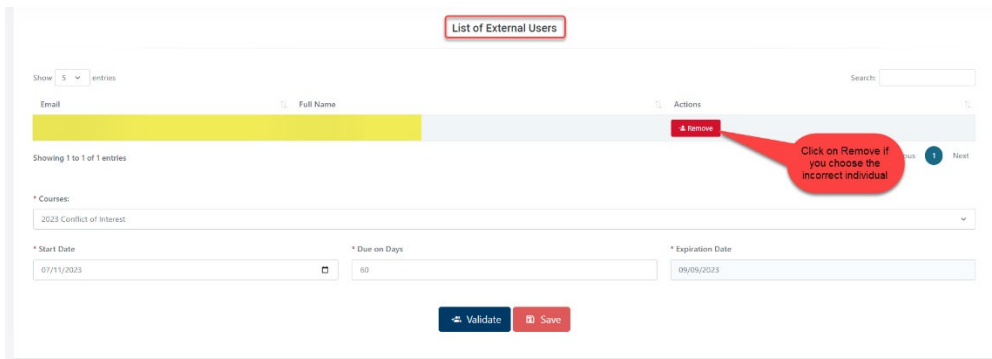
External User Search



A search form with a search icon and a search input field. Below the search field is a table with two columns: 'Full Name' and 'Email Address'. The table is currently empty.

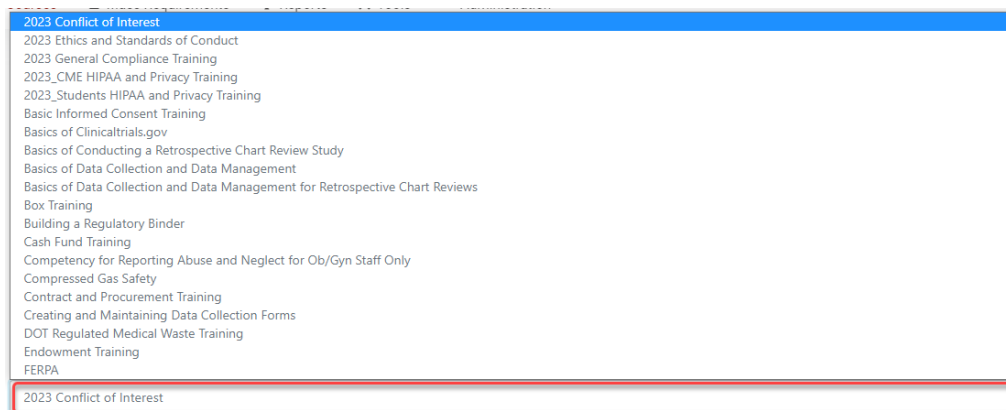
4) This will add the name to the **List of External Users**. Fill out the required fields.

Note: Required fields are identified by an asterisk ().*



A form titled 'List of External Users'. It features a search bar, a table with columns for 'Email', 'Full Name', and 'Actions'. The 'Actions' column contains a red 'Remove' button. Below the table are several required fields: '* Courses' (a dropdown menu), '* Start Date' (a date picker), '* Due on Days' (a text input), and '* Expiration Date' (a date picker). At the bottom are 'Validate' and 'Save' buttons. A red callout bubble points to the 'Remove' button with the text: 'Click on Remove if you choose the incorrect individual'.

5) In the **Courses** dropdown box, you will have a list of trainings that can be assigned. Select the required course.



A dropdown menu showing a list of courses. The first item, '2023 Conflict of Interest', is highlighted in blue. The list includes: '2023 Ethics and Standards of Conduct', '2023 General Compliance Training', '2023_CME HIPAA and Privacy Training', '2023_Students HIPAA and Privacy Training', 'Basic Informed Consent Training', 'Basics of Clinicaltrials.gov', 'Basics of Conducting a Retrospective Chart Review Study', 'Basics of Data Collection and Data Management', 'Basics of Data Collection and Data Management for Retrospective Chart Reviews', 'Box Training', 'Building a Regulatory Binder', 'Cash Fund Training', 'Competency for Reporting Abuse and Neglect for Ob/Gyn Staff Only', 'Compressed Gas Safety', 'Contract and Procurement Training', 'Creating and Maintaining Data Collection Forms', 'DOT Regulated Medical Waste Training', 'Endowment Training', and 'FERPA'. The '2023 Conflict of Interest' option is highlighted with a red box.

6) You can change the **Start Date**, **Expiration Date** and **Due on Days**.

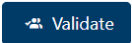
Note: if you change the Due on Days, the Expiration Date will be updated automatically.

Before

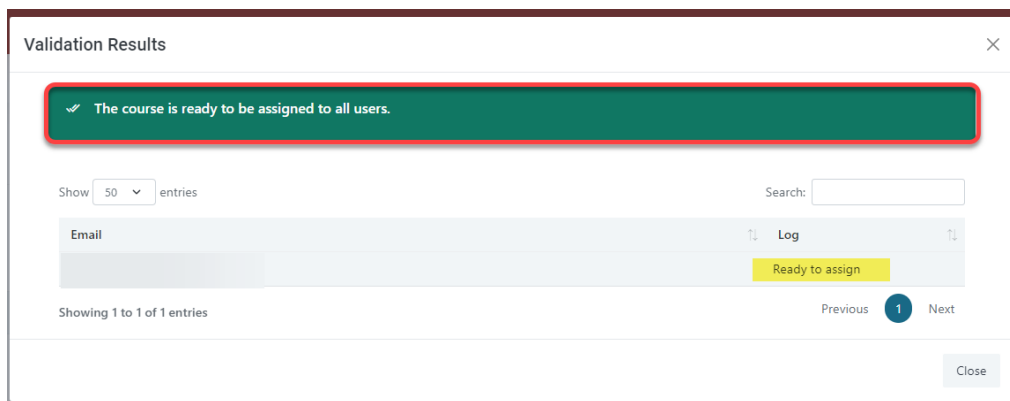
* Start Date: 07/11/2023
* Due on Days: 60
* Expiration Date: 09/09/2023

After

* Start Date: 07/11/2023
* Due on Days: 30
* Expiration Date: 08/10/2023

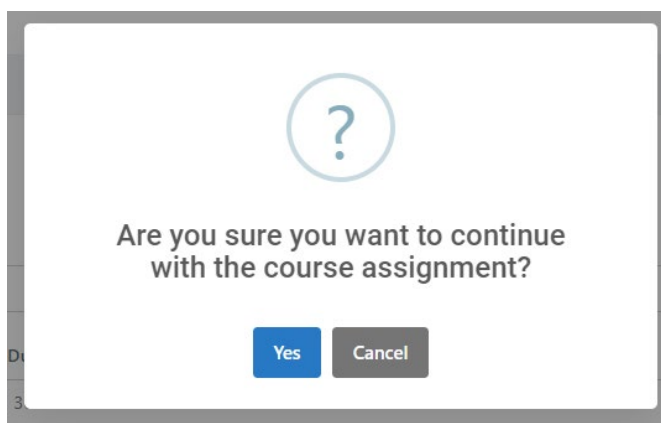
7) Next, click on the  button.

8) A pop-up message will appear stating that the courses have been assigned to the user(s). *Note: If the course has already been assigned, a red pop-up notification will state this. If multiple trainings will be assigned to an individual, repeat steps 5-7.*



9) Next, click on the  button at the bottom of the page.

10) A pop-up box will ask you if you are sure to continue. Click **Yes** to continue and **Cancel** to go back.



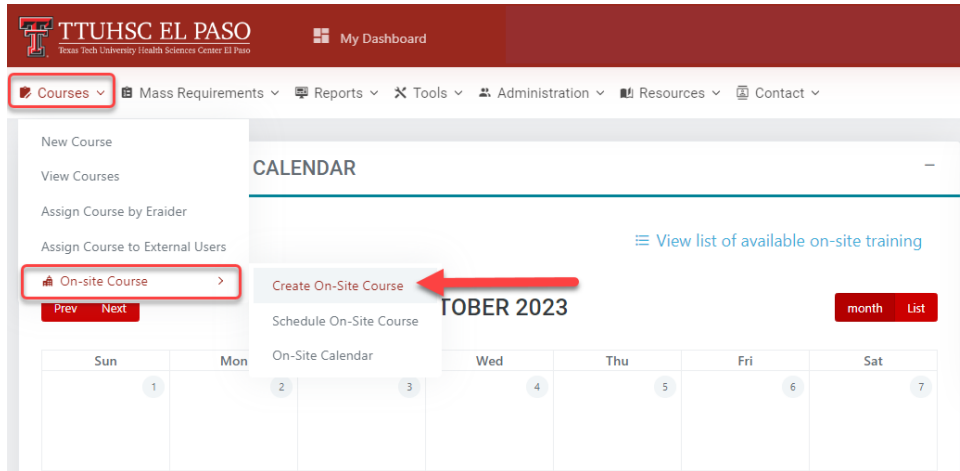
11) To verify that you have successfully assigned the training(s), go to **Manage External Users** and click on **View**. For more information on this, please refer to the [ADMINISTRATION – Manage External Users](#) section.

COURSES – CREATE ON-SITE COURSE

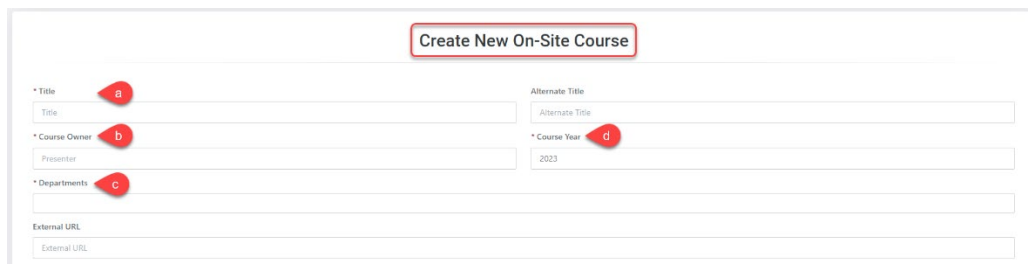
This feature will allow the user to create a course outline for individuals to register for a live, WebEx or online training session. Individuals will be able to self-enroll via the Tech Training application calendar.

Note: This feature will only be available for PowerUser, Administrator, and Committee roles.

- 1) To create an On-Site Course, click on the **Courses** dropdown → **On-Site Course** → then click on **Create On-Site Course**. You will see the following screen:

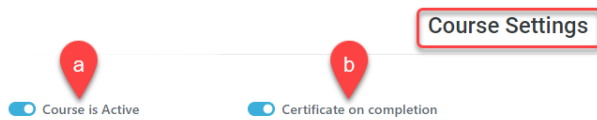


- 2) You will be directed to the **Create New On-Site Course** screen. Fill out the required fields. *Note: Required fields are identified by an asterisk (*).*
 - a) **Title** – Enter your desired title.
 - **Alternate Title** – This field can be left blank or you can type in the same as the Title.
 - b) **Course Owner** – Type the name of the person presenting the training.
 - c) **Departments** – Choose the departments that will be able to see the course.
 - d) **Course Year** – Select the current year.

The screenshot shows the 'Create New On-Site Course' form. The title 'Create New On-Site Course' is highlighted in a red box. The form contains several input fields: 'Title' (marked with a red circle 'a'), 'Alternate Title', 'Course Owner' (marked with a red circle 'b'), 'Presenter', 'Course Year' (marked with a red circle 'd'), and 'Departments' (marked with a red circle 'c'). There are also fields for 'External URL'.

- 3) Next, scroll down the page and in the **Course Settings** section:

- a) Leave the **Course is Active** toggle button blue if you want everybody to see the course. If disabled, only the individuals with Administrator and PowerUser role will be able to see the course.
- b) Leave the **Certificate on completion** toggle button blue so the users can download the certificate after passing the training.

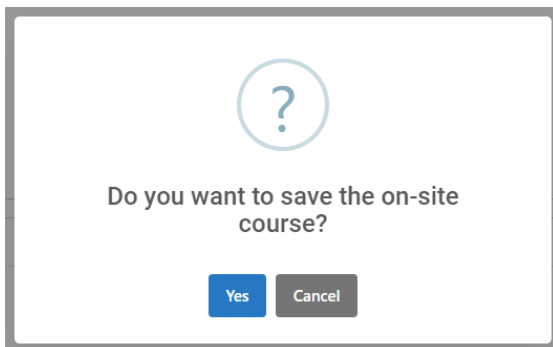


4) In the **Course Details** section, fill out the required fields. *Note: Required fields are identified by an asterisk (*)*.

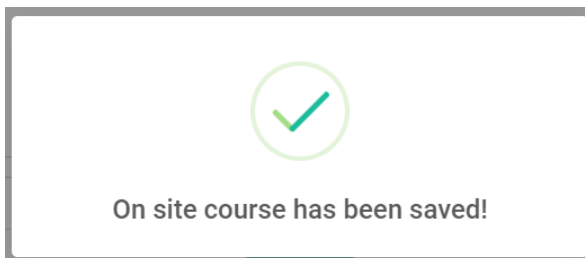
- a) **Course Description** – enter a short description of the course.
- b) **Objectives** – outline the goals for the user upon the completion of this course.
- c) **Outline** – enter a general description of the course content and instructions.

5) Click on the  Save button to continue.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the **Create New On-Site Course** screen, click **Cancel**.*



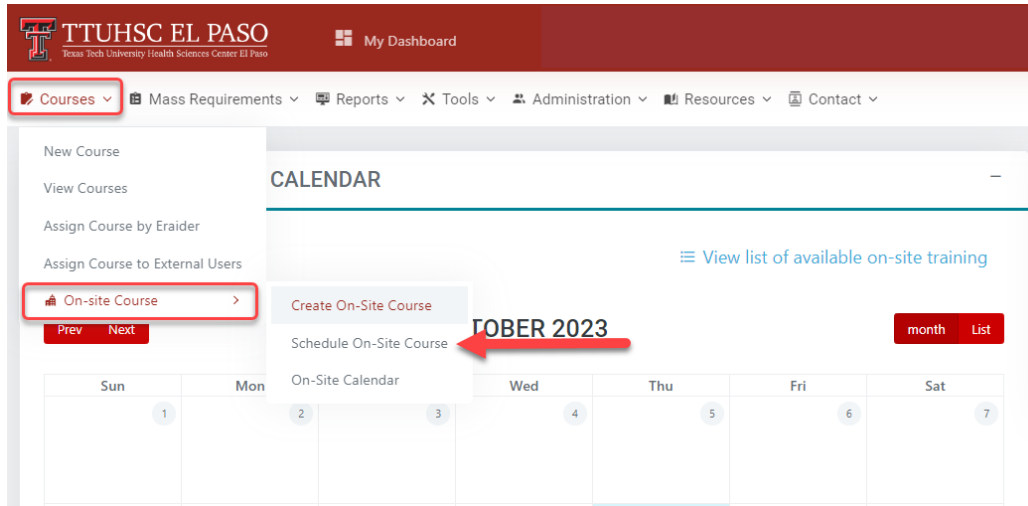
7) Once you click **Yes**, you will see the pop-up screen below confirming the course has been saved.



COURSES – SCHEDULE ON-SITE COURSE

This feature will allow users to set a time and place for the On-Site courses created.

- 1) To set a time and place for your course, click on the **Courses** dropdown → **On-Site Course** → then click on **Schedule On-Site Course**.



- 2) You will be directed to the **Schedule On-Site Training** screen.

The screenshot shows the 'Schedule On-Site Training' form. The title 'Schedule On-Site Training' is highlighted with a red box. The form includes the following fields:

- * Select Course: A dropdown menu with 'Select a course' placeholder.
- * Select Area: A dropdown menu with 'Compliance' selected.
- * Select Building: A dropdown menu with 'Select a building' placeholder.
- Select Room: A dropdown menu with 'Select a room' placeholder.
- Other Location: A text input field.
- * Schedule Date: A date and time picker showing '11/09/2023 07:00 AM'.
- * Training Duration (Minutes): A numeric input field with '30'.
- * Max Amount of Attendees: A numeric input field with '10'.
- Training Details section with fields for:
 - * Presenter: A text input field.
 - * Training Title: A text input field.
 - * Training Instructions: A rich text editor with a toolbar and a text area.
- A green 'Save Training' button at the bottom.

- a) **Select Course** – In the dropdown field, select the training you created.
- b) **Select Area** – This field will automatically populate with your department.

- c) **Select Building** – In the dropdown field, select the building that the training will be scheduled at for users to attend. If your desired building is not listed, select the **Other** option. Once the building is selected, you will be able to select the room.
- **Select Room** – In the dropdown field, select the room number.
 - **Other Location** – If you choose the **Other** option in the **Select Building field**, type your desired building and room number.

3) Scroll down and fill in the following fields.

- a) **Schedule Date** – Select the date and time of the training session.
- b) **Training Duration** – Indicate the length of time, in minutes, the training will take.
- c) **Max Amount of Attendees** – Indicate the maximum amount of people that can attend the training session.

4) Next, go down the page and in the **Training Details** section, fill out the required fields.

Note: Required fields are identified by an asterisk ().*

- a) **Presenter** – Name of the person who is presenting the training.
- b) **Training Title** – Type the name of the course you created.
- c) **Training Instructions** – Indicate what the users are going to do in the training session or if they will need to log in to web-based training.

Training Details

* Presenter a

Max Compliance

* Training Title b

Test

* Training Instructions c

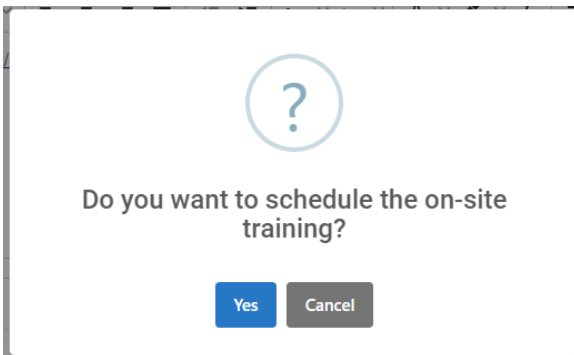
File Edit View Insert Format Tools Table Help

1. Test 1
2. Test 2
3. Test 3

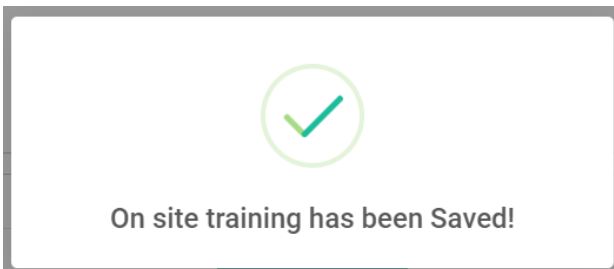
6 WORDS. POWERED BY TINY

Save Training

- 5) When you are ready, click on the **Save Training** button.
- 6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the Schedule On-Site Training screen, click **Cancel**.*



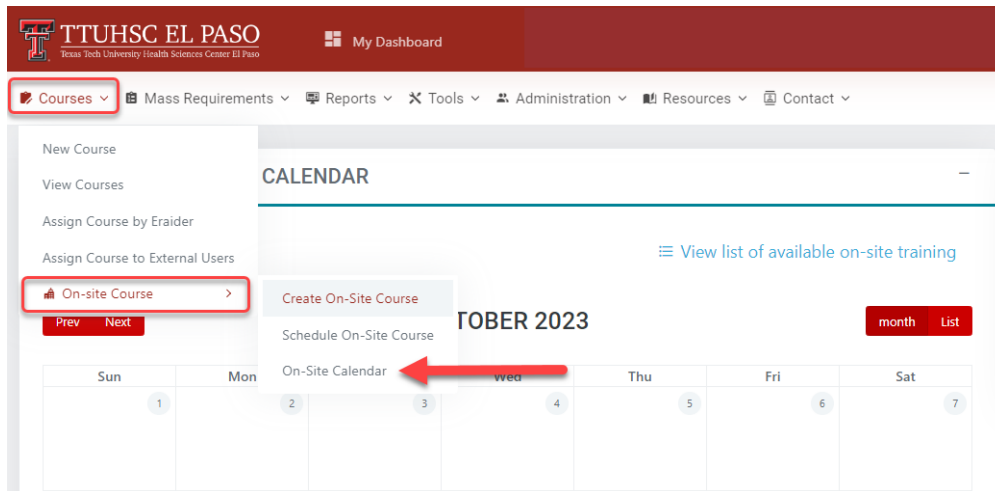
- 7) Once you click **Yes**, you will see the pop-up screen below confirming the On-Site training has been saved.



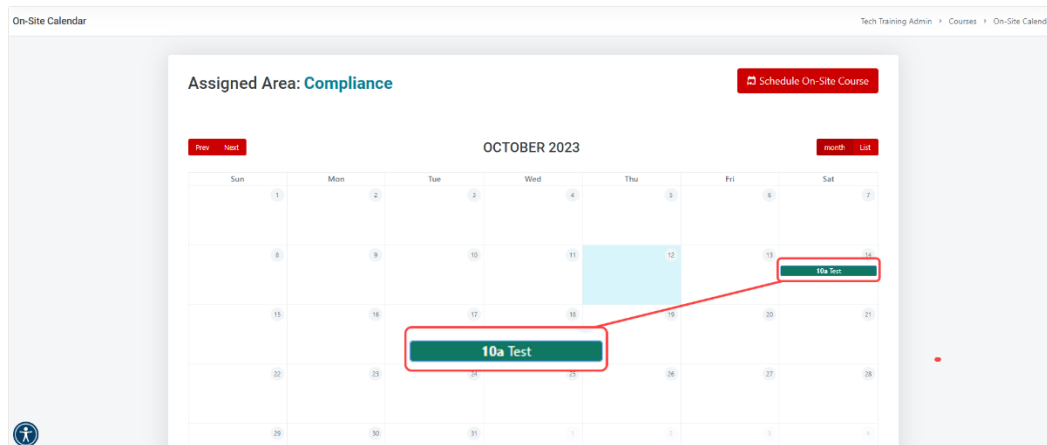
COURSES – ON-SITE CALENDAR

This feature will allow the user to modify/update the **On-Site Training** details such as the course, the area, location, duration, training instructions, etc.

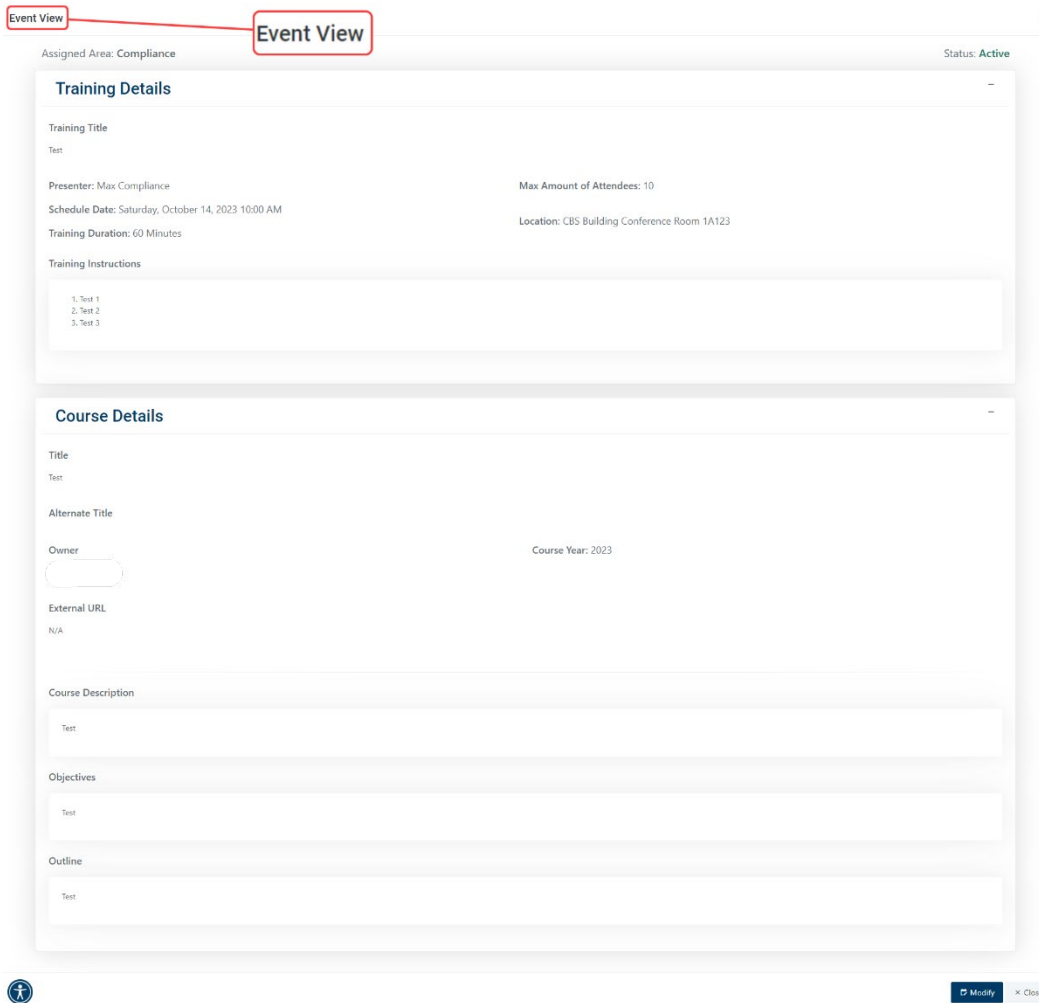
- 1) To see the **On-Site Calendar**, click on the **Courses** dropdown → **On-Site Course** → then click on **On-Site Calendar**.




- 2) You will be directed to the **On-Site Calendar**. The available courses will appear in the calendar.
 - a) If you want to see the details for that course, click on the name of the course.



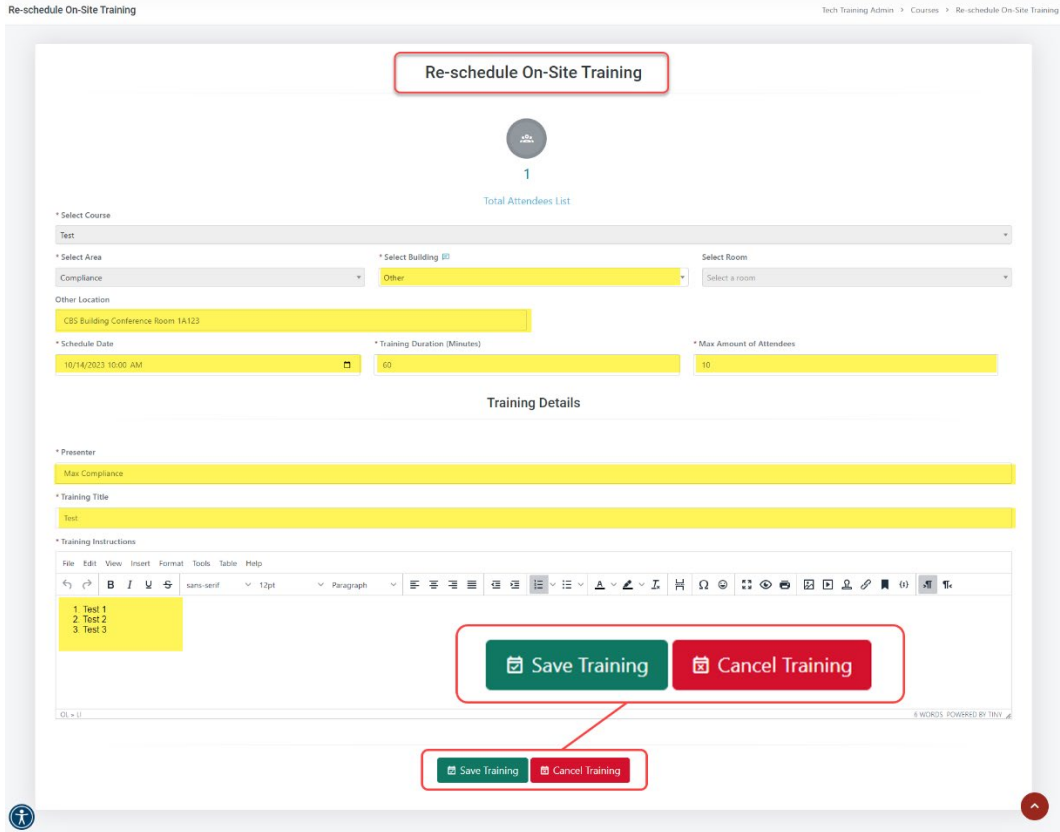
- 3) Next, you will see the **Event View** screen. In this page you will be able to see all details for that course.



4) To modify/update the information for the course, click on the  button at the bottom of the page.

5) You will be directed to the **Re-schedule On-Site Training** page. You can change/update the building, location, date, duration, and number of attendees, presenter, title, and instructions.

Note: Do not forget to click on Save Training if you change/update any information. You can also cancel the training if desired.



a) To see the list of attendees, click on the [Total Attendees List](#) link at the top of the page. You will see the following list:

Attendees List

Attendance Notes: By clicking yes the user will get a record of having completed this training successfully

Excel Copy PDF Search:

Erailer	User Name	Email	Enrolled Date	Attended?	Log
			10/12/2023	<input checked="" type="checkbox"/> Yes	N/A

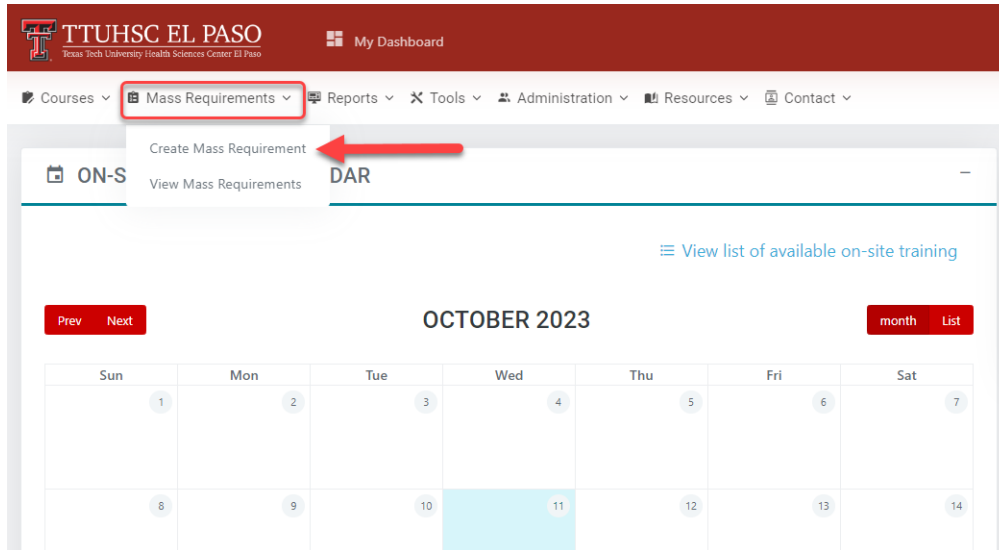
Showing 1 to 1 of 1 entries Previous 1 Next

Note: If the training has ended, you can no longer make changes to the training.

b) At this point, the presenter can confirm attendance by the **Yes** toggle button in the **Attended?** Column. This gives the user credit for attending the training.

MASS REQUIREMENT - CREATE A MASS REQUIREMENT

- 1) To create a Mass requirement, click on the **Mass Requirements** dropdown section, located on top of the page, then click on **Create Mass Requirement**.



- 2) This will take you to the **Mass requirement configuration** page.

The screenshot shows the 'Mass requirement configuration' page. The page title is 'Create Mass Requirement'. The main heading is 'Mass requirement configuration'. Below this, there are two radio button options: 'Search by employees' (selected) and 'Search by students'. There are 'Lookup' and 'Preview List' buttons. Below these is a status indicator: 'Final count of mass requirement users: 0'. There are three dropdown menus: 'Courses' (set to '2023 Conflict of Interest'), 'Description' (set to 'Mass Requirement Description'), and 'Start date' (set to '03/25/2023'). There are also 'End date' (set to '03/25/2024') and 'Due on days' (set to '60') fields. A 'Submit for approval' button is at the bottom.

- 3) To use the **Search by employees** option:
 - a) In the **Applies to** dropdown menu, you will be able to select **All Employees**, **Existing employees only** or **New employees only**.
 - The **All Employees** option will allow you to select all employees.

Courses ▾ Mass Requirements ▾ Reports ▾

Mass requirement configuration

Select one of the following:

Search by employees

Notes:

- If "All employees" is selected all other parameters will be ignored
- If "All employees" is selected new and current employees will be searched

* Applies to

All Employees

All Employees

Existing employees only

New employees only

- b) If you select **Existing employees only** or **New employees only**, you will have the option to choose **All Staff** or **All Faculty**. You may select both options at the same time, if needed.

Search by employees

Notes:

- If "All employees" is selected all other parameters will be ignored
- If "All employees" is selected new and current employees will be searched

* Applies to

Existing employees only ▾

Select one or more (Optional)

All Staff All Faculty

- c) If you select **Existing employees only** or **New employees only**:
- You will have the option to select the department under the **Select a department** dropdown box and the positions under the **Select a position** dropdown box.

Select one or more (Optional)

All Staff All Faculty

Employee targeting (Optional)

Select a department

ins Search...

Institutional Compliance Offc Eip

Select a position

senior of Search...

Senior Safety Officer Senior Office Assistant

When you make a selection, the department/position will move over to the column on the right side, this indicates the specific field has been selected.

If you select the incorrect department/position, from the right column, click on the name and it will unselect it.

4) To use the **Search by students** option:

a) In the **Applies to** dropdown section you will have 3 options: **All Students**, **Existing students only** and **New students only**.

- The **All Students** option will allow you to select all students.

Search by students

Notes:

- If "All students" is selected all other parameters will be ignored
- If "All students" is selected new and current employees will be searched

* Applies to

All Students

All Students

Existing students only

New students only

b) If you select **Existing Students only** or **New students only**:

- You will have the option to select any **college/program**. Click on the desired college/program under the **Select a college** and **Select a program** dropdown boxes.

Student targeting (Optional)

Select a college

Select a program

When you make a selection, the department/position will move over to the column on the right side, this indicates the specific field has been selected.

If you select the incorrect college/program, from the right column, click on the name and it will unselect it.

- 5) After making the selection of the users, click on the **Lookup** button. This will give you a count of the users that will be assigned to the mass requirement. If you click on the **Preview List** button, you will see a list of the users that will be assigned to the mass requirement.

DO NOT FORGET TO CLICK THIS BUTTON

Final count of mass requirement users: 1936

- 6) Next, you will scroll down to the bottom portion of the **Mass requirement configuration**.

* Courses: a

* Description: b

* Start date: c

* End date: d

* Due on days: e

Submit for approval

- a) The **Courses** section will have a dropdown menu where you can select the course you need.

* Courses:

- 2023 Conflict of Interest
- 2023 Conflict of Interest**
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training
- Basic Informed Consent Training
- Basics of Clinicaltrials.gov
- Basics of Conducting a Retrospective Chart Review Study
- Basics of Data Collection and Data Management
- Basics of Data Collection and Data Management for Retrospective Chart Reviews
- Box Training
- Building a Regulatory Binder
- Cash Fund Training
- Competency for Reporting Abuse and Neglect for Ob/Gyn Staff Only
- Creating and Maintaining Data Collection Forms
- Endowment Training
- FERPA
- FERPA TTUHSC ELP
- Human Trafficking Policy and Awareness
- Informed Consent Process Do's and Don'ts

b) Enter a brief description in this section:

* Description Brief description of mass requirement

Mass Requirement Description

c) **Start date** – Enter the current date

*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

d) **End date** – Enter the last day of the current calendar year. This ensures that the course remains active for the calendar year. (Remember, each calendar year you will be required to upload the course and obtain Committee approval.)

e) **Due on days** – Enter the number of days the users have to complete the course.

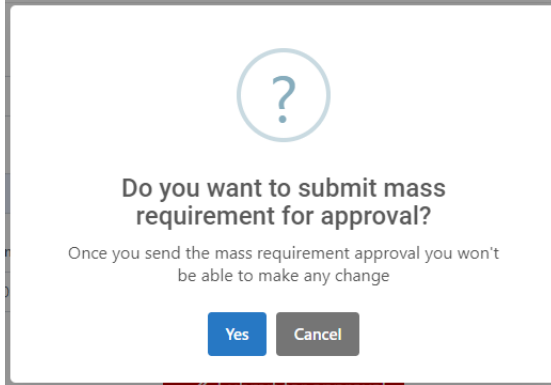
* Start date * End date * Due on days

7) Once you have entered all the required fields, click on the ✔ Submit for approval button at the bottom of the page.

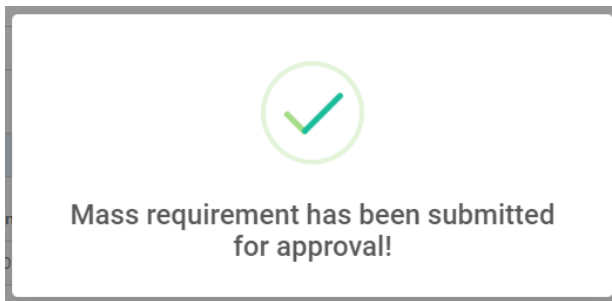
8) You will see the following pop-up:

a) If you are ready to submit the mass requirement, click **Yes** to submit for approval.

*Note: If you need to back to the **Finish** tab, click **Cancel**.*



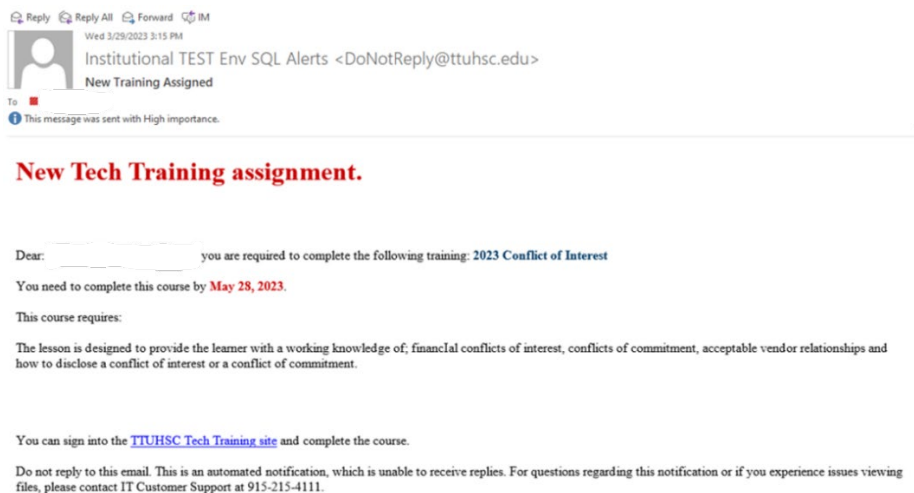
9) If you click **Yes**, you will see the following notification:



10) The **Mass Requirement** will be routed for approval to the Committee before the training is assigned.

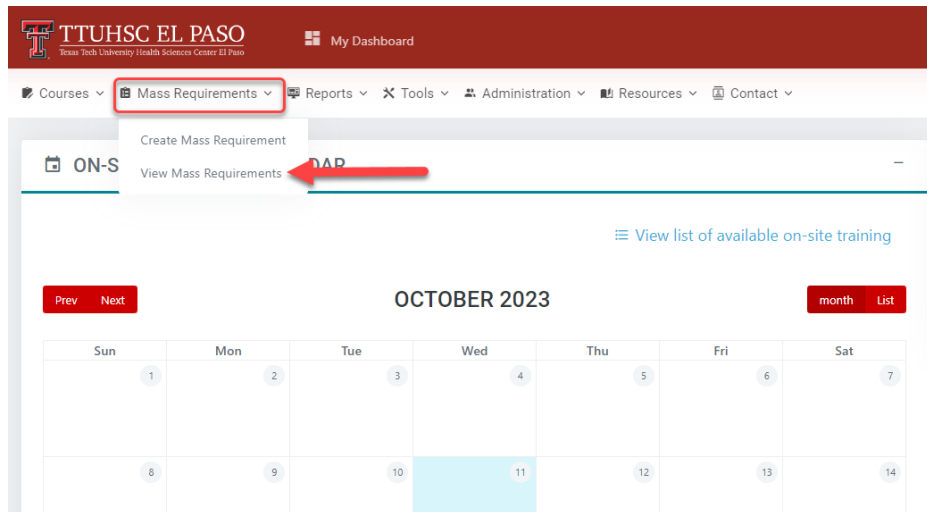
11) To check on the **Mass Requirement** approval status, refer to the **Mass Requirement Report**.

12) Once the **Mass Requirement** has been approved by the Committee, the users will receive an email notification stating the training has been assigned.



MASS REQUIREMENT - VIEW MASS REQUIREMENT

- 1) To check the status of a mass requirement, go to the **Mass Requirement** dropdown and click on **View Mass requirements**.



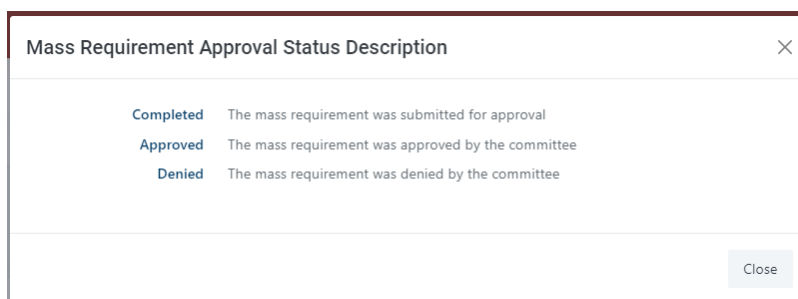
- 2) This will take you to the **Mass Requirement List** where you can check on the status of the assignment in the **Approval Status** column.

→ Mass Requirement List

Mass Requirement Type	Course Title	Approval Status	Cancelled?	Area	Course Role	Created by	Created Date	Actions
For research and IRS purpose	Basic Informed Consent Training	Approved	Yes	Compliance	Standard		2023/02/08 14:10	View Log
Cash Fund Training	Cash Fund Training	Approved	Yes	Compliance	Standard		2023/02/07 14:34	View Log
Cash Fund Training	Cash Fund Training	Approved	Yes	Compliance	Standard		2023/02/07 14:24	View Log
For research and IRS purpose	Basic Informed Consent Training	Approved	Yes	Compliance	Standard		2023/02/06 16:38	View Log
For research and IRS account purpose	Basic Informed Consent Training	Approved	Yes	Compliance	Standard		2023/02/06 16:37	View Log
Cash Fund Training	Cash Fund Training	Approved	Yes	Compliance	Standard		2023/02/06 11:32	View Log
TST EDGAR	TST QUICK TRAINING	Approved	Yes	Safety Services	Quick-Training		2023/02/03 18:02	View Log
For research and IRS account	Basic Informed Consent Training	Approved	Yes	Compliance	Standard		2023/02/02 16:47	View Log
Cash Fund Training	Cash Fund Training	Approved	Yes	Compliance	Standard		2023/01/24 16:54	View Log
for research and its purpose	Basic Informed Consent Training	Approved	Yes	Compliance	Standard		2023/01/24 15:22	View Log

Showing 1 to 10 of 44 entries

- a) Click on the top right side of the page to see the **Approval Status Descriptions**.



3) In the **Actions** column, you can select **View**, **Log** or **Cancel** buttons.

Mass Requirement List

Show 10 entries Search:

Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
Assignment of LSE course	Laboratory Safety Essentials	Completed	No	Safety Services	Quick-Training		2023/04/13 11:26	View Log Cancel
Required to work in laboratory/be added	Laboratory Safety Essentials	Completed	No	Safety Services	Quick-Training		2023/04/13 11:08	View Log Cancel

a) If you click on the **View** button, you will be able to look at detailed information entered in the **Mass Requirement**.

Mass Requirement View

Approval Step: **Approved** Approved By: Approved Date: 5/19/2023 12:00 AM

Comments
No Approval necessary

Mass Requirement Configuration

Course title
Refresher Training - Emergency Procedures EP-2023

Mass Requirement Description
Mass requirement to insert refresher AP-2022 completed training.

Area: Safety Services Created by:

Course Role: Standard Created date: 5/19/2023 12:00:00 AM

Start date: 1/1/2022

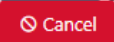
End date: 1/1/2022

Amount of impacted users: 2056

b) The **Log** button will show you the **Course Log**. This section will display the history of the **Mass Assignment**.

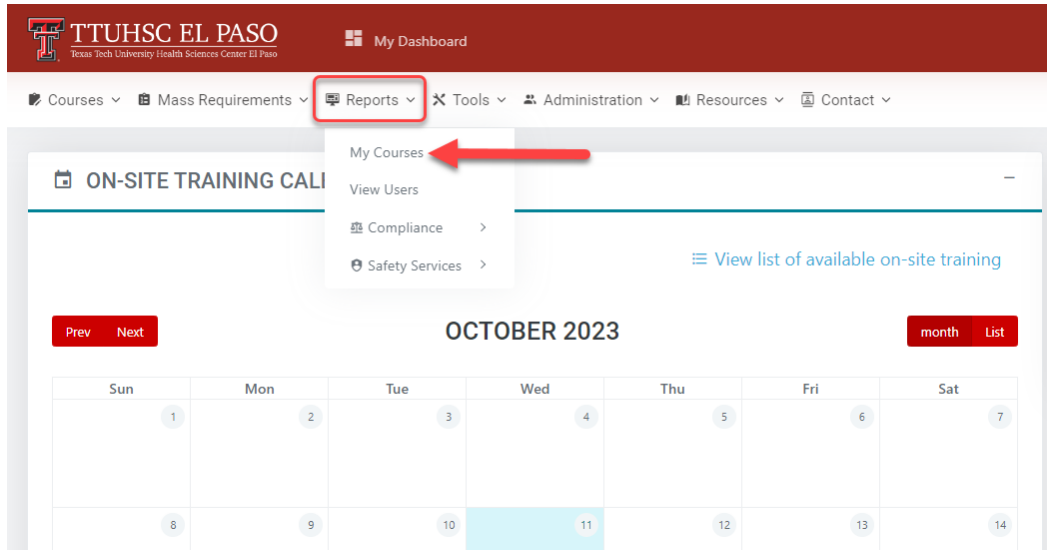
Course Log

Log Type	Log	Changed By	Changed Date
ManageCourse	Course status changed to: Approved by: juliquer on: 1/13/2023 4:22:11 PM		1/13/2023 4:22 PM
ManageCourse	Course status changed to: Completed by: acornkov on: 1/11/2023 10:08:47 AM		1/11/2023 10:08 AM
ManageCourse	Question changed from: The appearance of a Conflict of Interest is defined as: to: The appearance of a Conflict of Interest can be defined as:		1/11/2023 9:59 AM
ManageCourse	Question changed from: A faculty member must be present before a health care vendor can interact with students and/or residents or fellows about their products. to: A faculty member must be present before a health care vendor can interact with students, residents or fellows about their products.		1/11/2023 9:57 AM
ManageCourse	Question changed from: If you engage in research you will also have to complete a disclosure form for the TTU/ISC El Paso Conflict of Interest in Research Committee (COIRC) to: If you engage in research you will have to complete a disclosure form for the TTU/ISC El Paso Conflict of Interest in Research Committee (COIRC)		1/11/2023 9:57 AM
ManageCourse	Question changed from: A faculty member must be present before a Health Care Vendors can interact with students and/or residents or fellows about their products. to: A faculty member must be present before a health care vendor can interact with students and/or residents or fellows about their products.		1/11/2023 9:56 AM

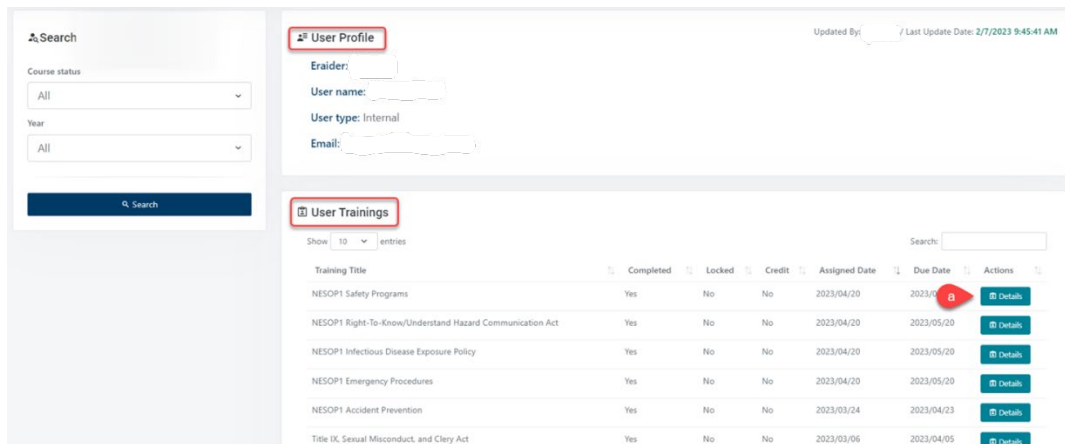
c) The  button will delete the mass requirement.

REPORTS – MY COURSES

- 1) To check your profile and course status, click on **Reports** dropdown section, located on top of the page, then click on **My Courses**.



- 2) Next, you will see the following page. In this page you will find your personal information such as the **User Profile** and the **User Trainings**.



- a) Under the **Details** button, you can get detailed information of the trainings you have been assigned. You can also **Download a certificate of completion**.

Training View

Current Status: **Completed**

Training

Course
NESOP1 Accident Prevention

Year: 2023

Recurring: One time

Requires Test: Yes

Number of questions on Quiz: 10

Number of correct questions on Quiz: 8

My training details

Assigned Date: 3/24/2023

Due Date: 4/23/2023

Attempts: 1

Final Grade:

Completed Date: 4/3/2023

[Download certificate of completion](#)

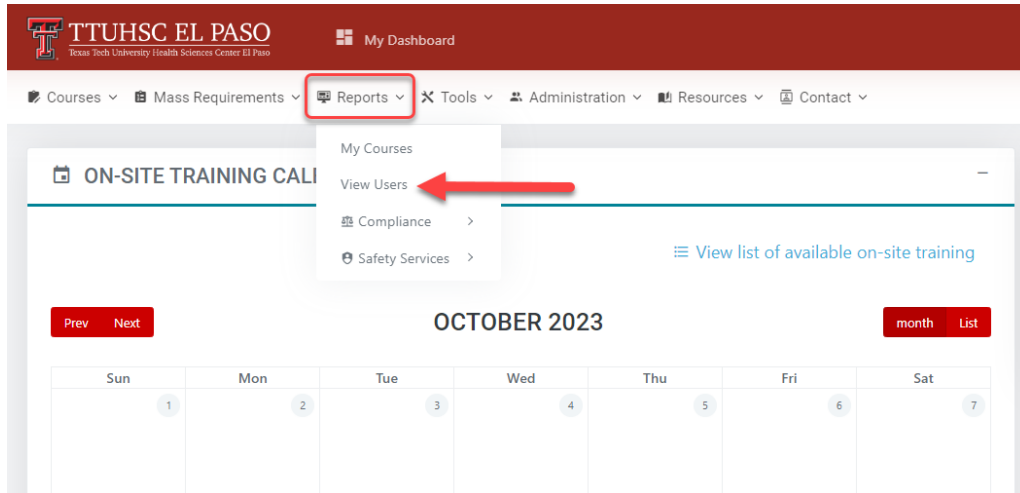
[Download certificate of completion](#)

My Exams

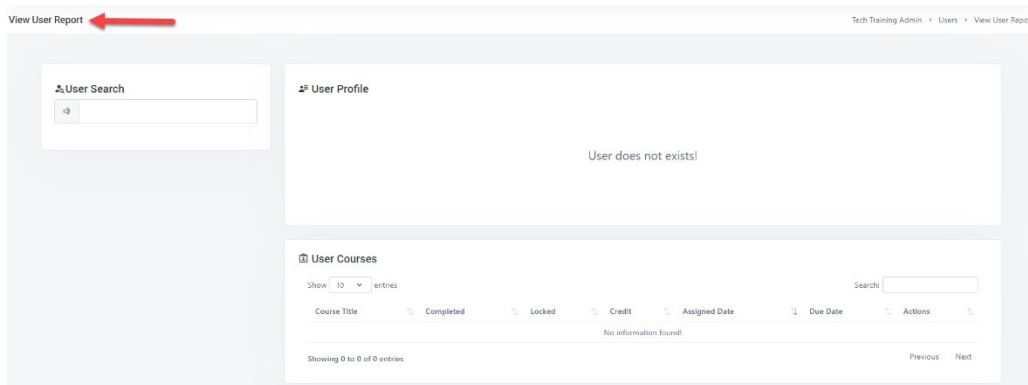
Start Date	Completed	Finish Later	Completed Date	Passed	Correct Answers	Grade
2023/04/03	Yes	No	4/3/2023	Yes		

REPORTS – VIEW USERS

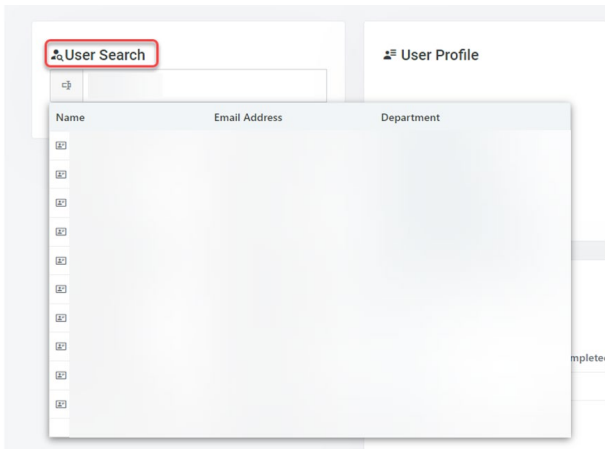
- 1) To search for users, click on **Reports** dropdown section, located on top of the page, then click on **View Users**.



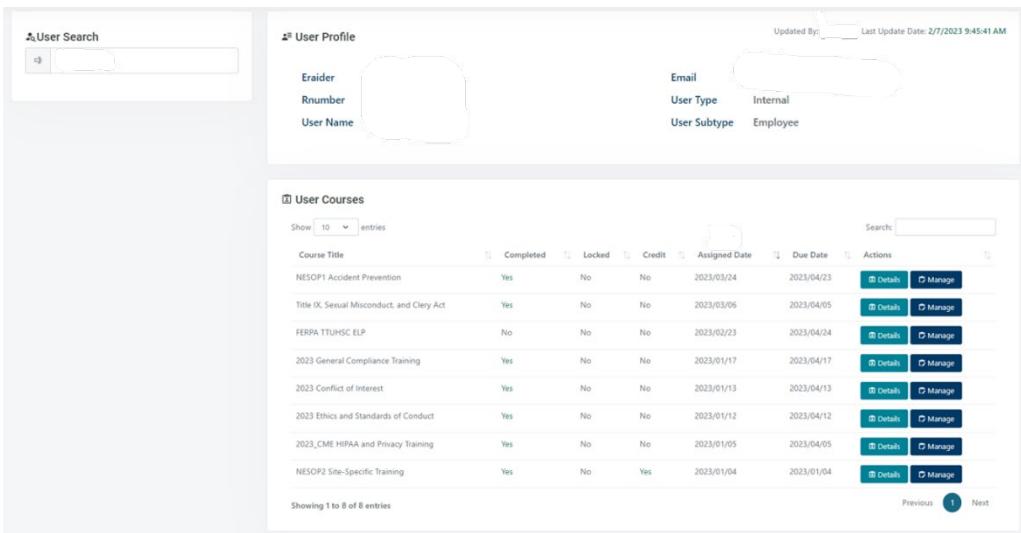
- 2) Next, you will find the **View User Report** page.



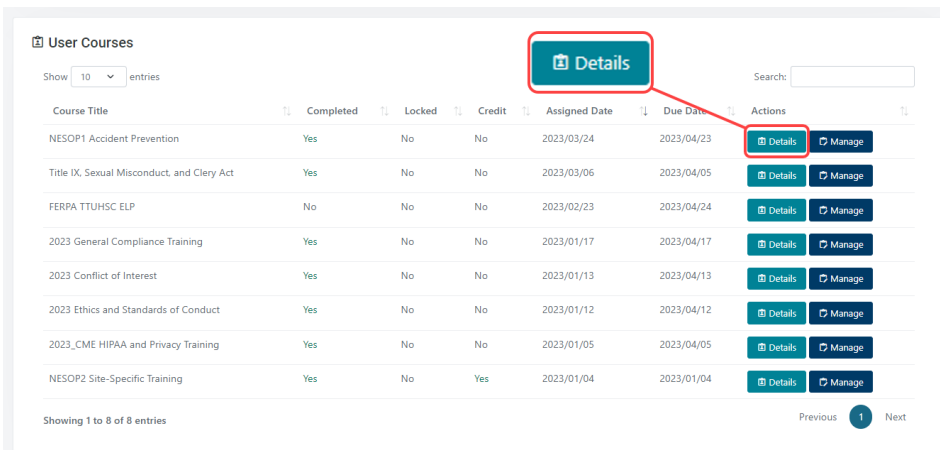
- 3) In the **User Search** section, you will be able to search for a specific user with their **eRaider, first name and/or last name**. A list of names will populate in a dropdown box.



- 4) Select the name of the individual. The following page will display the **User Profile** and the **User Courses**.



- 5) If you click on the **Details** blue button, it will direct you to the **View User Course Details** page.



a) In this page you can see a detailed description of the trainings and exams the user has completed.

Current Status: **Completed**

Training

Course
NESOP1 Accident Prevention

Year: 2023

Recurring: One time

Requires Test: Yes

Number of questions on Quiz: 10

Number of correct questions on Quiz: 8

My training details

Assigned Date: 3/24/2023

Due Date: 4/23/2023

Attempts: 1

Final Grade:

Completed Date: 4/3/2023

My Exams

Start Date	Completed	Finish Later	Completed Date	Passed	Correct Answers	Grade
2023/04/03	Yes	No	4/3/2023	Yes		

6) If you click on **Manage**, it will direct you to the **Manage User Course** page.

User Courses

Show 10 entries

Course Title	Completed	Locked	Credit	Assigned Date	Due Date	Actions
NESOP1 Accident Prevention	Yes	No	No	2023/03/24	2023/04/23	Details Manage
Title IX Sexual Misconduct and Clery Act	Yes	No	No	2023/03/06	2023/04/05	Details Manage
FERPA TTUHSC ELP	No	No	No	2023/02/23	2023/04/24	Details Manage
2023 General Compliance Training	Yes	No	No	2023/01/17	2023/04/17	Details Manage
2023 Conflict of Interest	Yes	No	No	2023/01/13	2023/04/13	Details Manage
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12	2023/04/12	Details Manage
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05	2023/04/05	Details Manage
NESOP2 Site-Specific Training	Yes	No	Yes	2023/01/04	2023/01/04	Details Manage

Showing 1 to 8 of 8 entries

Previous 1 Next

a) Under the **Actions** section, you will have two options, first you can **Enable/Cancel Training** and second you can give credit to an individual by clicking on the **Credit Training** button.

Current Status: **Completed**

Training

Course
2023 General Compliance Training

Year: 2023

Recurring: Recurring

Requires Test: Yes

Assigned Date: 1/17/2023

Due Date: 4/17/2023

Attempts: 1

Number of questions on Quiz: 10

Number of correct questions required to pass the Quiz: 8

Actions

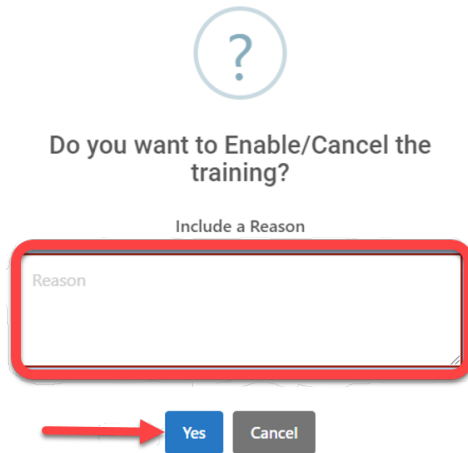
Enable/Cancel Training [Cancel](#)

Currently: Active

Credit Training [Credit](#)

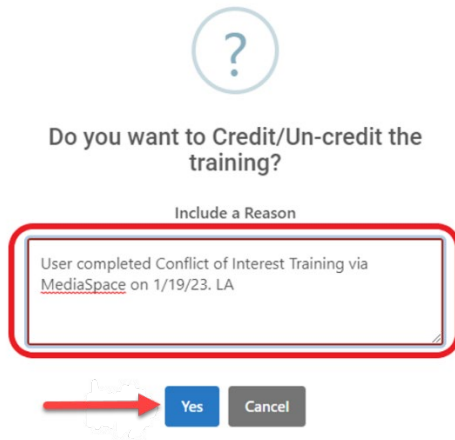
Currently: Not Credited

- 7) **Enable/Cancel Training:** If you click in this section a pop-up screen will appear. You will have to give the reason you want to cancel the training. After you are finish, click **Yes**.



The screenshot shows a pop-up dialog with a question mark icon at the top. The text reads "Do you want to Enable/Cancel the training?". Below this is a section labeled "Include a Reason" containing a text input field with the placeholder "Reason". At the bottom, there are two buttons: "Yes" (highlighted with a red arrow) and "Cancel".

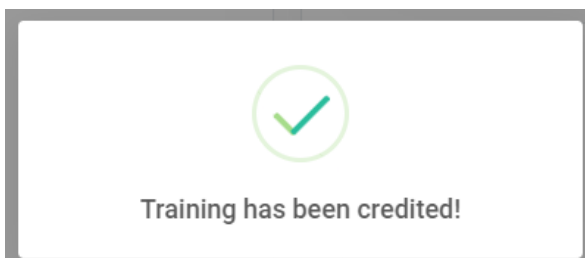
- 8) **Credit Training:** If you click on this section a pop-up message will appear. You will have to include a reason you want to give credit for the training. After you are finish, click **Yes**.



The screenshot shows a pop-up dialog with a question mark icon at the top. The text reads "Do you want to Credit/Un-credit the training?". Below this is a section labeled "Include a Reason" containing a text input field with the text "User completed Conflict of Interest Training via MediaSpace on 1/19/23. LA". At the bottom, there are two buttons: "Yes" (highlighted with a red arrow) and "Cancel".

Note: Use the following template when including the reason; User completed (name of training) via MediaSpace or Canvas Catalog on (date). (Initials)"

- a) Once you click **Yes**, you will see the following pop-up notification.



- 9) Next, under the **User Course** section you can verify if the credit was successfully applied to the training. Check for a **Yes** under the **Completed** section.

User Courses

Show entries

Course Title	Completed	Locked	Credit	Assigned Date
2023 General Compliance Training	Yes	No	No	2023/01/17
2023 Conflict of Interest	Yes	No	No	2023/01/13
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05

- 10) **Unlock User:** This option will display if the user has used all of their attempts and has not successfully passed the test, or if the user ran out of time. Click **Unlock**.

Manage User Course

Current Status: **Locked**

Training

Course
2023_CME HIPAA and Privacy Training

Year: 2023

Recurring: One time

Requires Test: Yes

Assigned Date: 1/5/2023


Due Date: 4/5/2023

Attempts: 3


Number of questions on Quiz: 12

Number of correct questions required to pass the Quiz: 10


Actions

Enable/Cancel Training 

Currently: Active

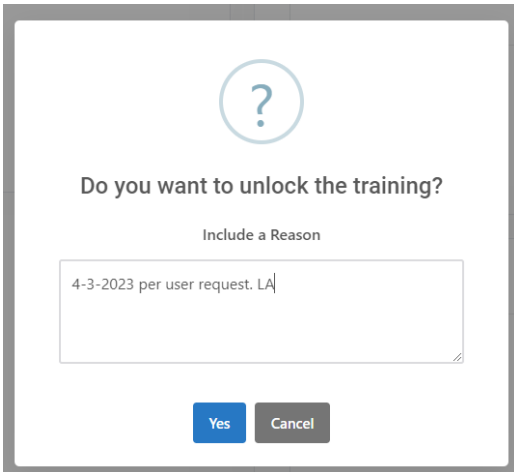
Credit Training 

Currently: Not Credited

Unlock User 

Locked on: 3/31/2023

- a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel**, if you made a mistake. Click **Yes** when you are ready.
- Make sure you enter a brief message before confirming **Yes**.



?

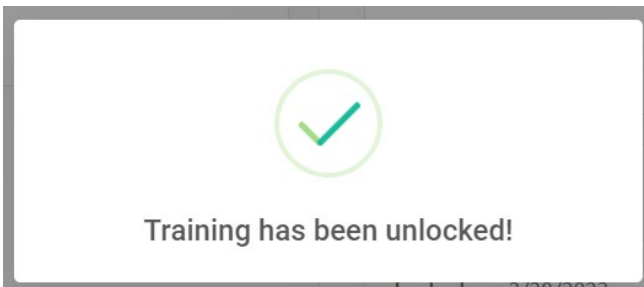
Do you want to unlock the training?

Include a Reason

4-3-2023 per user request. LA

Yes Cancel

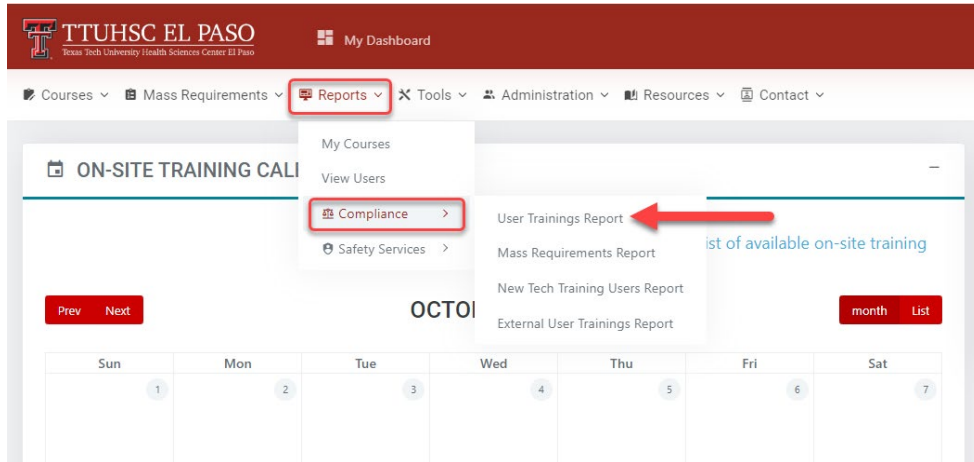
- b) After you have clicked **Yes**, a pop-up notification will appear to confirm. You can go back to the **View User Report** to make sure the user was unlocked.



REPORTS – COMPLIANCE USER TRAININGS REPORT

The **User Training Report** will yield training completion information for all active users in Tech Training. The report includes the following fields: id, training, r number, eRaider, full name, email, termination date, start date, due date, course active, completed, credited, locked, attempts, grade, completed date, department, college, and position.

- 1) To pull a **User Training Report**, click on the **Reports** dropdown → **Compliance** → then click on **User Trainings Report**. You will see the following screen:



- 2) You will be redirected to the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

The screenshot shows the 'User Training Report' search criteria form. The form includes the following fields:

- Eraider** (a): A text input field with the value 'Eraider'.
- Date Range** (b): A date range input field with the value '01/01/2023 - 05/03/2023'.
- Training** (c): A dropdown menu with the value 'Select a course'.
- Training Status** (d): A radio button selection with options: All (selected), Completed, Credited, Locked, and Due.

A 'Search' button is located at the bottom right of the form.

- a) **eRaider** – Enter the **individual's eRaider**. If you need to pull a report for all users, leave this field blank.

Search Criteria

Eraider


Eraider

- b) **Date Range** – Click on this section to select the specific **date range** you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range

01/01/2023 - 05/03/2023

Jan 2023							Feb 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31	29	30	31	1	2	3	4
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	1	2	3	4
29	30	31	1	2	3	4	5	6	7	8	9	10	11

01/01/2023 -  **Apply**

- c) **Training** – Click on the **Training field** to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.

Training

Select a course

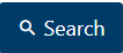
Select a course

- 2023 Conflict of Interest
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training**

- d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.

Training Status

All Completed Credited Locked Due

- 3) Once you have filled in all of the fields, click on the  **Search** button.

- 4) When you click **Search**, the report will populate in the **Results** section at the bottom of the screen.

Results

Excel Copy PDF Search:

Training	Eraider	Full Name	Start Date	Due Date	Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/03/2023	08/01/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	8	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	10	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	2	8	05/02/2023
2023 Conflict of Interest			04/30/2023	07/29/2023	True	False	False	False			

- 5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

Results

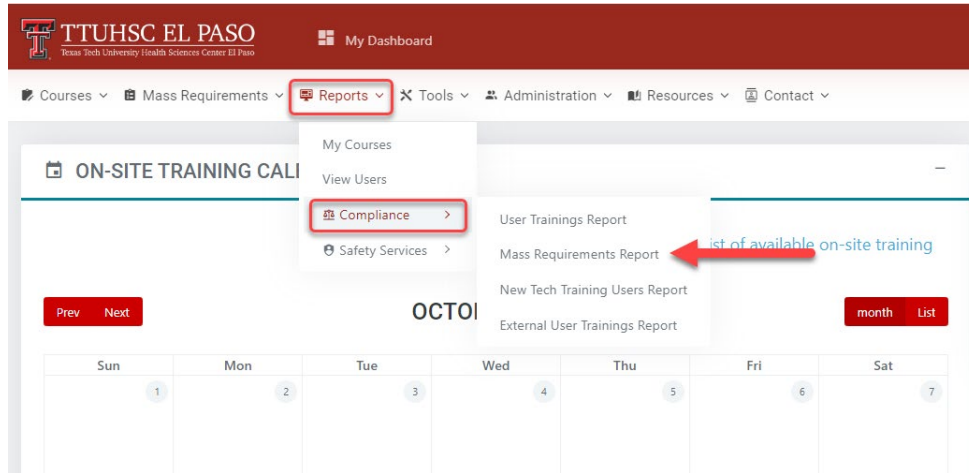
Excel Copy PDF

- 6) Once you have downloaded your report, save the **User Training Report** to your desired location.

REPORTS – COMPLIANCE MASS REQUIREMENTS REPORT

The **Mass Requirements Report** will yield training course information for all courses that have been uploaded into Tech Training. The report includes the following fields: course title, created by, created date, course approval status start date, expiration date, MR description, MR approval status, approved by, approved date and approved comment.

- 1) To pull a **Mass Requirements Report**, click on the **Reports** dropdown → **Compliance** → then click on **Mass Requirements Report**.



- 2) When you click on **Mass Requirement Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:


The screenshot shows the 'Mass Requirement Report' search criteria form. The 'Search Criteria' section has two fields: 'Date Range' with the value '01/01/2023 - 12/19/2023' and a red 'a' next to it, and 'Training' with a dropdown menu and a red 'b' next to it. A blue 'Search' button is below the fields. The 'Results' section shows a table with columns: Course Title, Created By, Created Date, Course Approval Status, Start Date, Expiration Date, MR Description, MR Approval Status, Approved by, Approved Date, and Approved Comment. The table is currently empty, showing 'No Records'. There are 'Size', 'Copy', and 'PDF' buttons above the table, and a search bar on the right.

- a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range

01/01/2023 - 05/03/2023

Jan 2023							Feb 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31	29	30	31	1	2	3	4
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	1	2	3	4
29	30	31	1	2	3	4	5	6	7	8	9	10	11

01/01/2023 -  **Apply**


- b) **Training** - you will need to select a course in the **Training** field dropdown. If you need to pull a report that shows all training courses, you may leave this field as **Select a course**.

Training

Select a course

Select a course

- 2023 Conflict of Interest
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training**

- 3) Once you have completed all of the required fields, click on the  button.
- 4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

Results

Excel Copy PDF Search:

Course Title	Created By	Created Date	Course Approval Status	Start Date	Expiration Date	MR Description	MR Approval Status	Approved by	Approved Date	Approved Comment
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	01/24/2024	for research and IRIS purpose	Approved		01/24/2023	Committee has already approved the training. Assigned training for individual is approved. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes. █	Denied		03/30/2023	Testing. Not approved. Look at your course information. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/31/2023	03/31/2024	This is for testing purposes. █	Approved		04/13/2023	Testing approval yqc
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/13/2023	12/31/2023	COI training is required by policy 10.50, Regents' Rules chapter 3.1 and Texas Government Code 572	Approved		01/13/2023	Approve yearly course
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes. █	Approved		03/29/2023	Force Mass Requirement

- 5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

Results

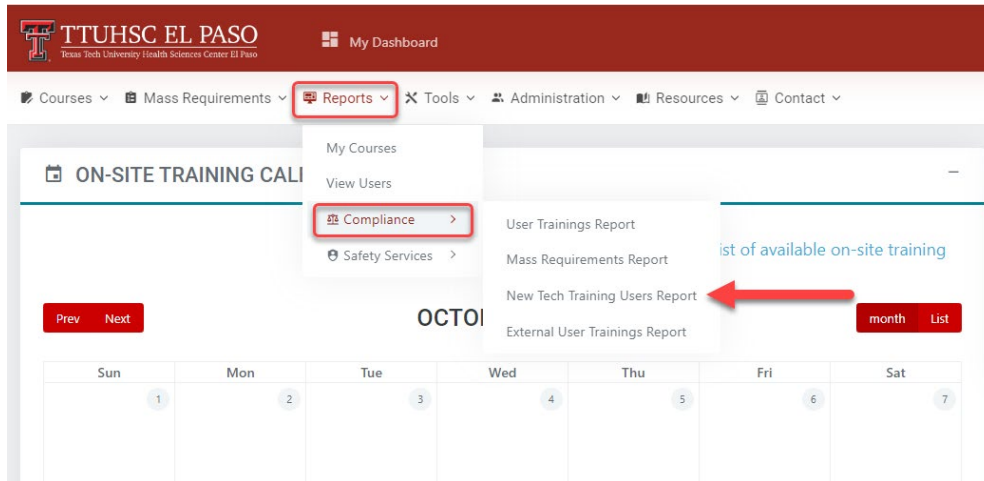
Excel Copy PDF

- 6) Once you have downloaded your report, make sure to save the **Mass Requirement Report** to your desired location.

REPORTS – COMPLIANCE NEW TECH TRAINING USERS REPORT

The **New Tech Training Users Report** is utilized to verify the number of employees hired by date range.

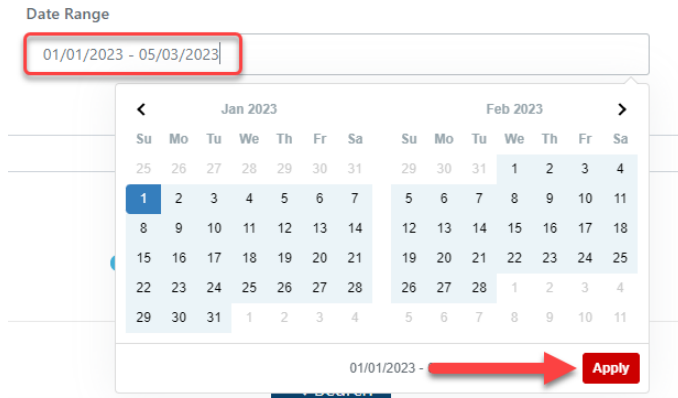
- 1) To pull a **New Tech Training Users Report**, click on the **Reports** dropdown → **Compliance** → then click on **New Tech Training Users Report**.



- 2) When you click on **New Tech Training Users Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

A screenshot of the 'Search Criteria' form. It features a 'Date Range' field with a red circle 'a' next to it, containing the text '04/23/2023 - 05/23/2023'. To the right is a 'User Type' section with a red circle 'b' next to it, containing three radio button options: 'All' (selected), 'Employees', and 'Students'. A blue 'Search' button is located at the bottom right of the form.

- a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.



b) **User Type** – If you want to see a specific User Type, select either All, Employees or Students.

User Type

All Employees Students

3) Once you have completed all of the required fields, click on the  **Search** button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

Eralder	UserName	Email	User Type	Department	Position	College	Imported Date
			Employee	Transmountain Practice Surgery ELP	Clinical Assistant		03/08/2023
			Student			ME	03/06/2023
			Employee	Clinical Operations OB/GYN	Patient Services Specialist		03/05/2023
			Employee	Orthopaedics ELP	Advance Practice Provider - NP		03/05/2023
			Employee	Human Resources ELP	HR Generalist ELP		03/03/2023
			Employee	Payment Services ELP	Analyst II		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Professor- General Dentistry		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Dental Dispensing Assistant		03/03/2023
			Employee	Faculty Development ELP	Analyst II		03/03/2023
			Employee	Clinical Operations NEURO	Medical Clinic Supervisor- ELP		03/03/2023
			Employee	Office of Global Health Affairs ELP	Coordinator		03/03/2023

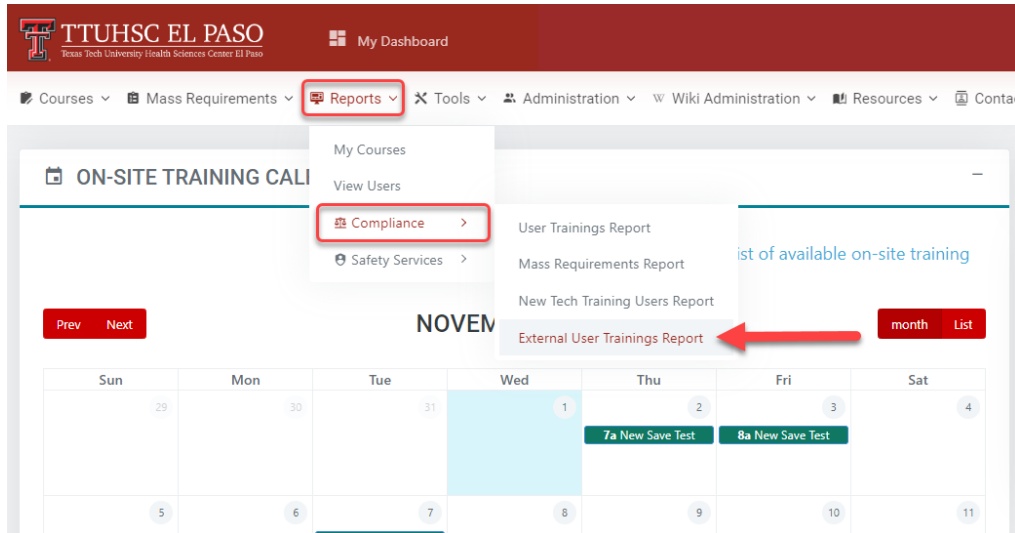
5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

Results

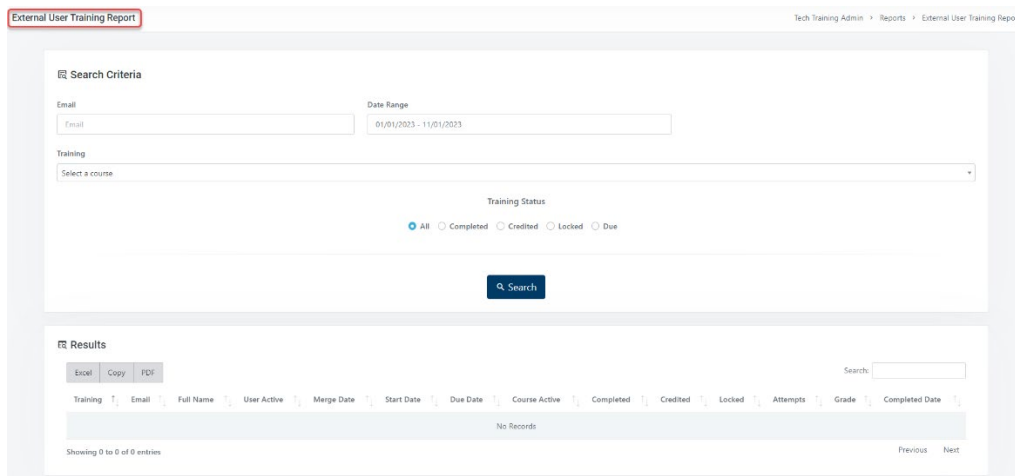
REPORTS – COMPLIANCE EXTERNAL USER TRAININGS REPORT

The External User Trainings Report will show the user the training information for the External Users.

- 1) To download the External Users Training Report, go to the **Reports** tab at the top of the page → **Compliance** and click on **External User Trainings Report**.

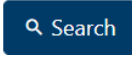


- 2) This will take you to the **External User Training Report** page.



- 3) In the **Search Criteria** section, fill out the following fields:
 - a) **Email** – Enter the **individual's personal email**. If you need to pull a report for all users, leave this field blank.
 - b) **Date Range** – Select the desired date range.

- c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.
- d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.

4) After you have filled out all the fields, click on the  button.

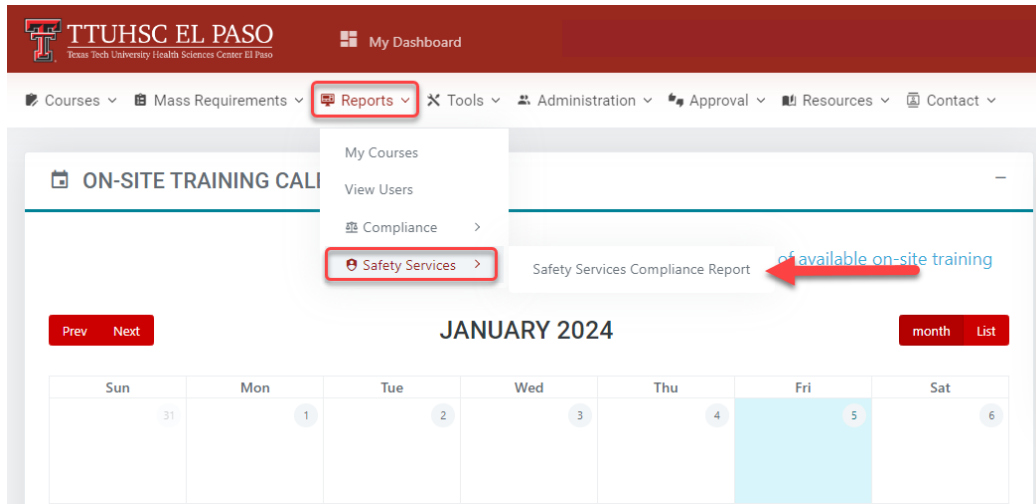
5) The **Results** section will populate with all the External User Trainings information. Click on the **Excel**, **PDF** or **Copy** option to download or save the report.

Training	Email	Full Name	User Active	Merge Date	Start Date	Due Date	Course Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			Yes		09/22/2023	11/21/2023	Yes	Yes	No	No	1	5	09/22/2023
2023 Conflict of Interest			Yes		04/14/2023	06/13/2023	Yes	No	No	Yes	3		
2023 General Compliance Training			Yes		09/22/2023	11/21/2023	Yes	No	No	No			
2023_Students HIPAA and Privacy Training			Yes		09/22/2023	11/21/2023	Yes	No	No	No			
3			Yes		09/19/2023	11/18/2023	Yes	No	No	No			
3			Yes		09/15/2023	11/14/2023	Yes	No	No	No			
3			Yes		04/14/2023	06/13/2023	Yes	Yes	No	No	0	10	09/15/2023
Basic Informed Consent Training			Yes		09/19/2023	11/18/2023	Yes	No	No	No			

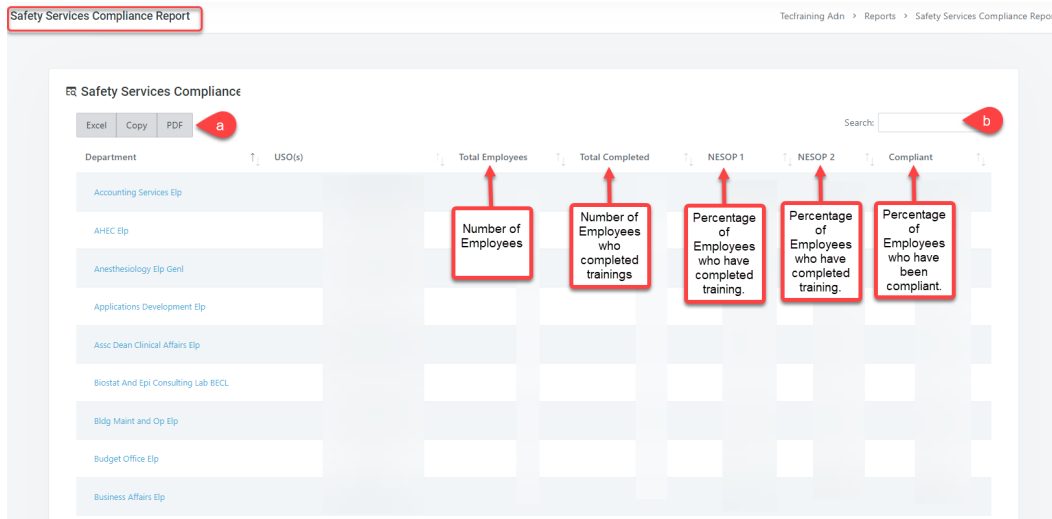
REPORTS – SAFETY SERVICES COMPLIANCE REPORT

For more information on Safety Services content, please contact the Safety Services department at safetyserviceselp@ttuhsc.edu or call 915-215-4823.

- 1) Go to the **Reports dropdown**, click **Safety Services** and go to **Safety Services Compliance Report**.



- 2) Next, you will see the **Safety Services Compliance Report** screen.

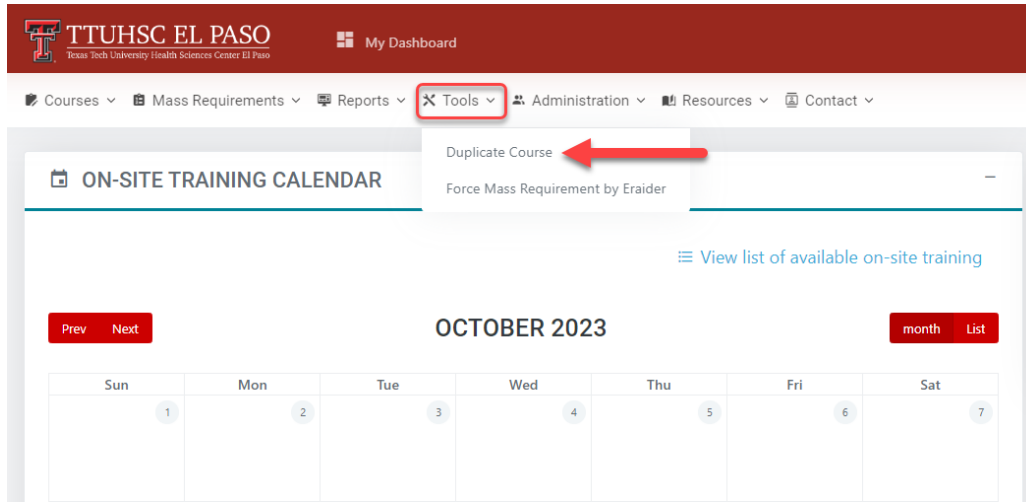


- a) In this section, you will have the option to export the document into **Excel** or **PDF** or **Copy** the document.
- b) You have the **Search** bar where you can look up a department by its name.

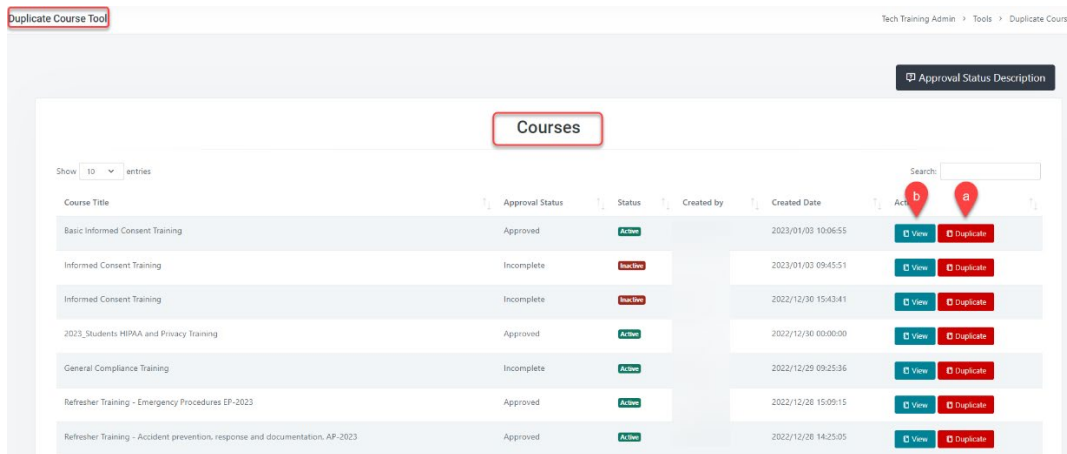
TOOLS – DUPLICATE COURSE

The Duplicate Course feature assists in creating a course by replicating a previous approved course. The user will not need to recreate it; however, the course will require committee approval once submitted.

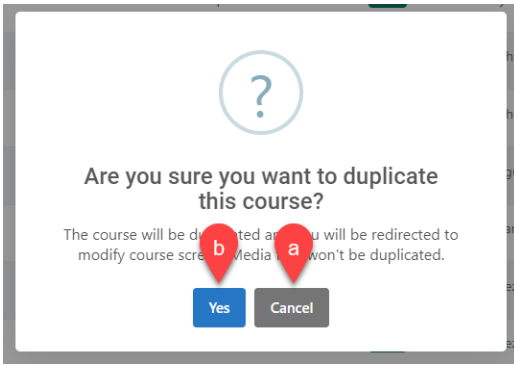
- 1) Go to **Tools** dropdown at the top of the page and click **Duplicate Course**.



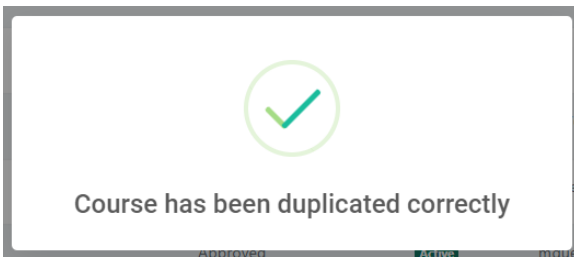
- 2) This will take you to the **Duplicate Course Tool** screen. A list of **Courses** will appear.
 - a) Look for the training you want to duplicate and click on **Duplicate**.
 - b) You can click on **View** to see the details of the course.



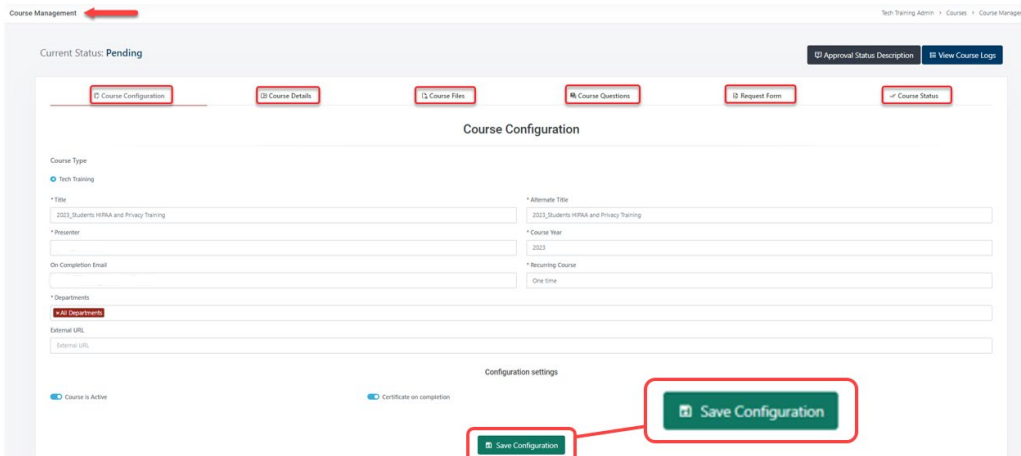
- 3) Next, the following pop-up box will appear:




- a) To go back to the **Duplicate Course Tool** screen click **Cancel**.
- b) If you want to proceed click **Yes**. You will see the following pop-up notification:

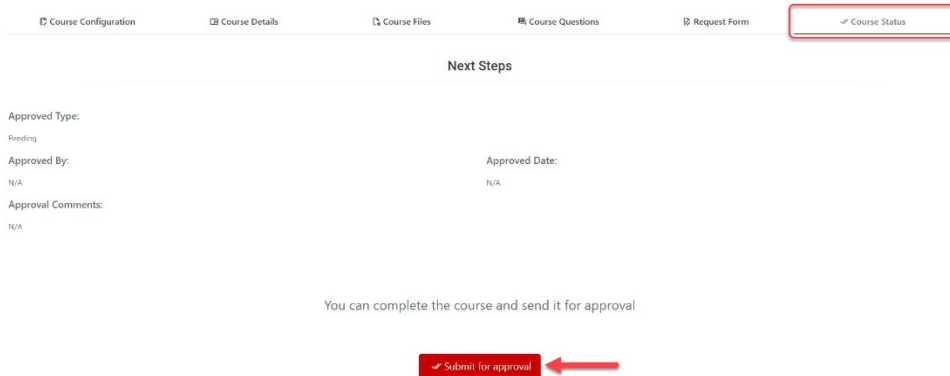


- 4) Next, you will see the **Course Management** screen. Follow the steps under the [Create a Course](#) section, **steps 1-26**.
- 5) Start making the changes for the duplicate course. You can click on the **tabs** to continue.

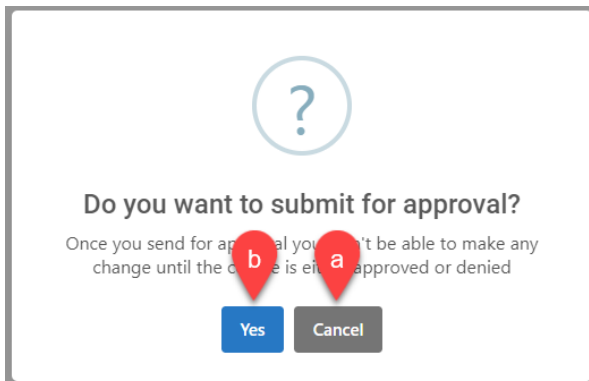


Note: Do not forget to click on the  button after completing each section.

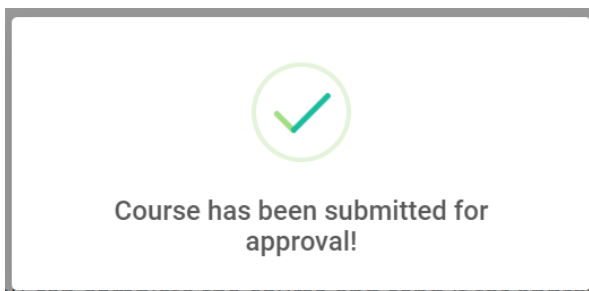
- 6) Once you are at the **Course Status** tab and you have finished making changes, click on the **Submit for approval** button.



- 7) A pop-up box will appear.
- a) Click **Cancel** if you want to stay on the **Course Management** screen.
 - b) Click **Yes** if you are ready to submit for approval.



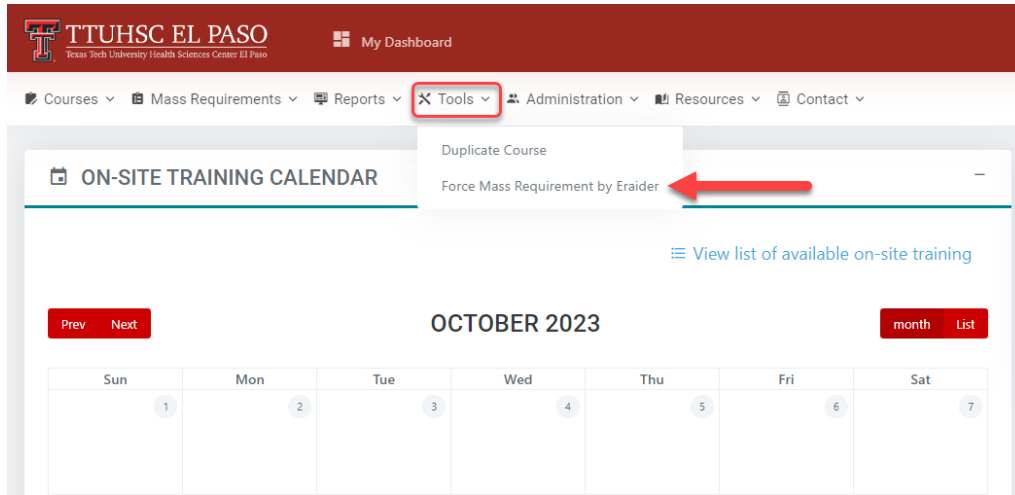
- 8) A pop-up box will appear confirming that the course was submitted for approval.



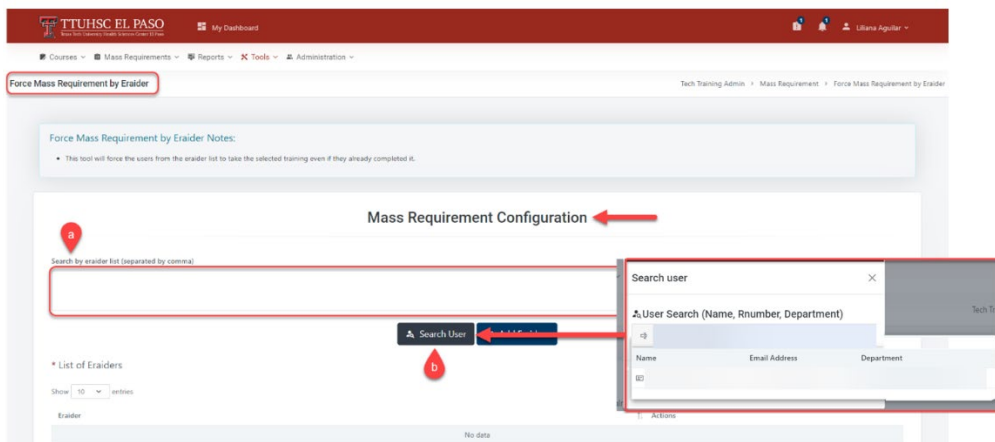
TOOLS – FORCE MASS REQUIREMENT BY ERAIDER

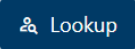
- 1) Go to the **Tools dropdown** and click **Force Mass Requirement by eRaider**.

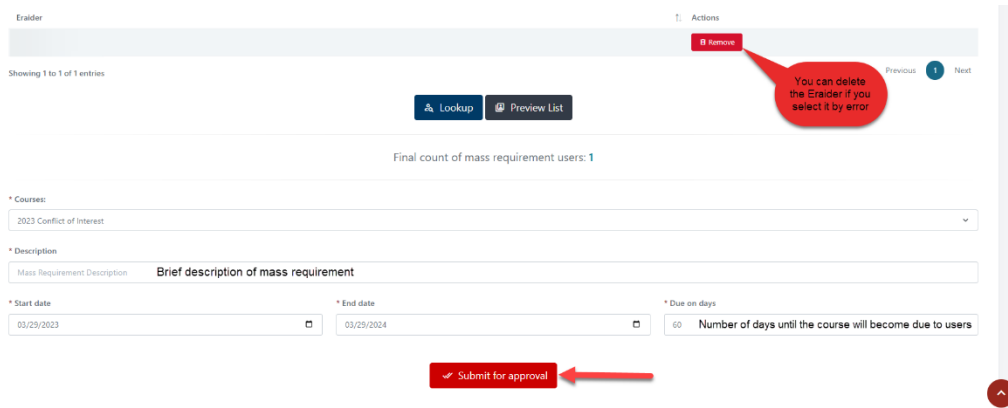
Note: This feature will assign/reassign the training course to the users selected even if the user has already completed the training.



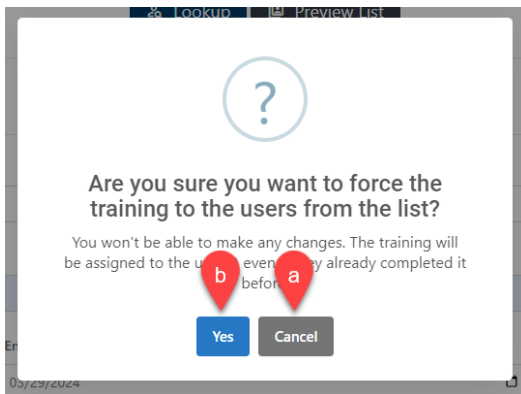
- 2) This will take you to the **Force Mass Requirement by eRaider** screen.
- 3) Under the **Mass Requirement Configuration** section, in the **Search by eRaider list** box, type the individual(s) eRaider(s). Then press the **Add Erainers** button.
 - a) If you do not know the eRaider, click on **Search User** button and type the individual(s) name(s). This field will populate a list of names. Click on the desired name(s).



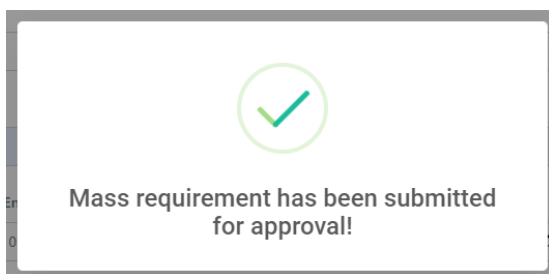
- 4) Next, click on the  button. This will indicate the number of individuals that will have the training assigned. It also activates the request.
- 5) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Submit for approval**.



- 6) Next, a pop-up window will appear.
 - a) Click **Cancel** to stay on **Mass Requirement Configuration** section.
 - b) Click **Yes** to proceed.



- c) When you click **Yes**, a pop-up notification will appear to confirm your submission.

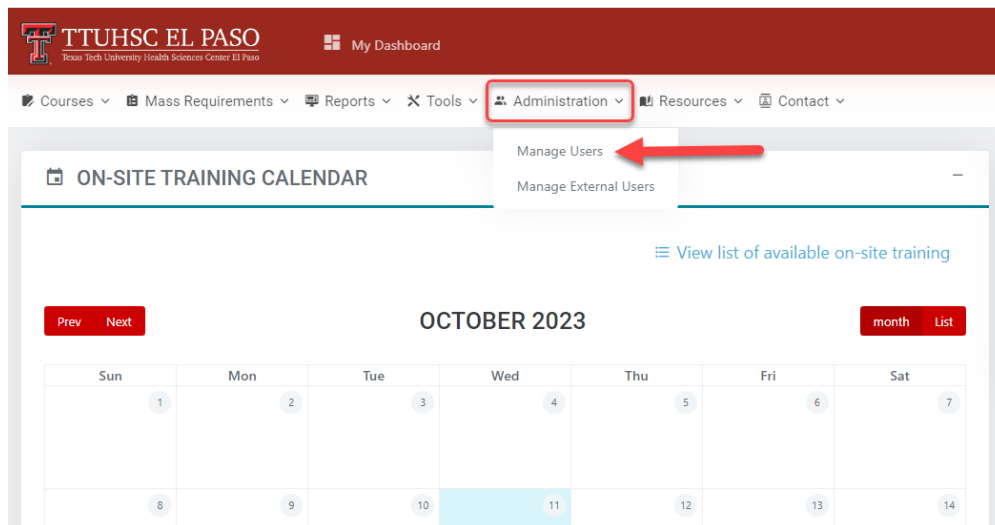


ADMINISTRATION - MANAGE USERS

- 1) In the Tech Training application, some users will be assigned a different **User Type** depending on their department, role, and job duties:
 - **Administrator role** – the user will have full access to all of the functions. The administrator role will be the **only** one that will be able to modify the role for any user.
 - **Committee role** – user will be able to review/approve new training courses and mass requirements.
 - Only the **Administrator** and **Committee roles** can be selected together.
 - **Power User role** – will only let user create courses for the selected departments.
 - **Wiki Admin role** – will allow the user to create or modify wiki content for any website in Texas Tech.
 - **User role** – is the default role for every user that does not require special permissions.

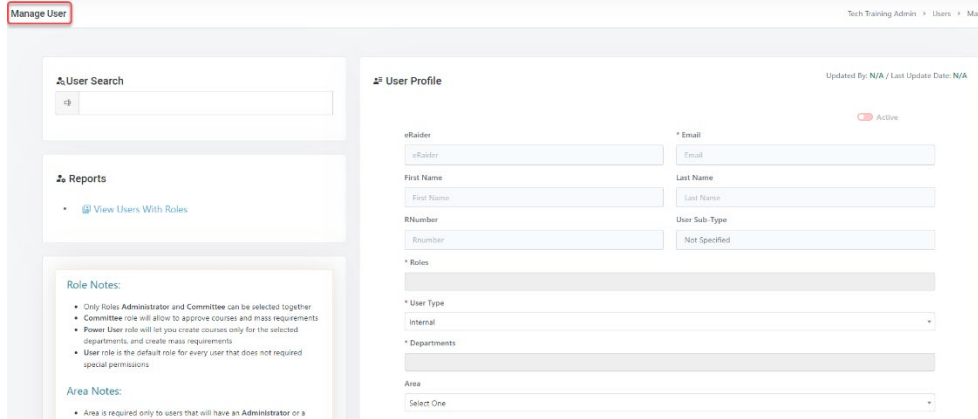
Note: Area is required only to users that will have an Administrator or a Power User Role. Depending on the area selected some extra features will appear so be careful when assigning an area.

- 2) To manage/edit a user's role, go to **Administration dropdown** and click **Manage Users**.

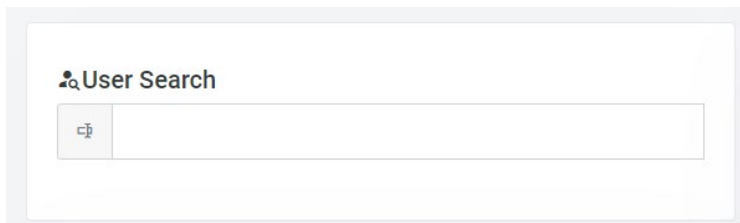


The screenshot displays the TTUHSC EL PASO system interface. At the top, there is a navigation bar with the logo and 'My Dashboard'. Below this is a secondary navigation bar with dropdown menus for 'Courses', 'Mass Requirements', 'Reports', 'Tools', 'Administration', 'Resources', and 'Contact'. The 'Administration' dropdown menu is open, showing 'Manage Users' and 'Manage External Users'. A red arrow points to 'Manage Users'. Below the navigation is a section titled 'ON-SITE TRAINING CALENDAR' with a 'View list of available on-site training' link. The calendar shows 'OCTOBER 2023' with a grid of dates from 1 to 14. The date '11' is highlighted in light blue.

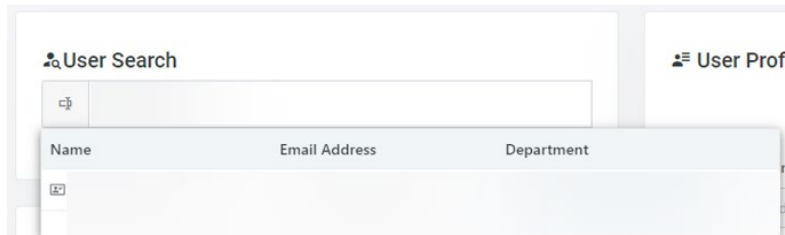
3) This will take you to the **Manage User** screen.



4) To search for a user, click on the **User Search** bar on the left side of the screen.



a) Next, you will need to type in the name or eRaider of the individual you are searching for. A dropdown menu will populate where you can select the individual by clicking on their name.



5) When you click on the individual's name, their information and role will populate on the right side in the **User Profile** section.

Updated By: esosamar / Last Update Date: 5/19/2023 2:06:11 PM

User Profile Active

eRaider * Email

First Name Last Name

RNumber User Sub-Type

* Roles

* User Type

* Departments

Area

[Save](#)

- 6) Click on the **Roles** section. There will be a dropdown menu of all of the available roles. To change a role for the user, click on role needed. The roles selected will appear in this section (in dark red).

* Roles

x Administrator

Administrator

Committee

PowerUser

User

USO

- 7) Click on **Departments** section to change the department. There will be a dropdown menu of all available departments. Click on department needed.

* Departments

x Institutional Compliance Offc Elp

Information Services Elp

Institutional Compliance Offc Elp

Internal Medicine Elp Genl

Interprofessional Education El Paso

IT Adm Svcs ELP

Kumar Start Up

- 8) Click on **Area** to assign the user a specific area. A dropdown box will appear with the available options.

Area

Select One

Select One


Compliance

Finance

Human Resources

IT

Other

9) Once you have selected the new role(s), department and area that apply, click on the  button at the bottom of the **User Profile** section.

10) Next, scroll down the page in the **User Logs** section. You will see a history of the user's roles, training that has been assigned, as well as any changes that have been made.

User Logs

Show: 10 entries

Search:

Created By	Created Date	Log Type	Log
	2023/05/19 14:06:11	ManageUser	Role changed to: Administrator
	2023/04/20 09:44:28	ManageUser	Area Type Changed from: N/A to: Compliance
	2023/04/20 09:44:28	ManageUser	Role changed to: Administrator
	2023/04/20 09:44:09	ManageUser	Area Type Changed from: N/A to: Compliance
	2023/04/20 09:44:09	ManageUser	Role changed to: User
	2023/03/14 14:35:54	UserCourseExam	Training has been completed successfully
	2023/03/14 14:28:25	UserCourseExam	Number of attempts: 1
	2023/03/14 14:02:46	UserCourseExam	File Title IX El Paso Training.pdf downloaded by user
SYSTEM	2023/03/06 14:20:52	UserLog	New course assignment: Title IX, Sexual Misconduct, and Clery Act
SYSTEM	2023/02/23 11:05:43	UserLog	New course assignment: FERPA TTUHSC ELP

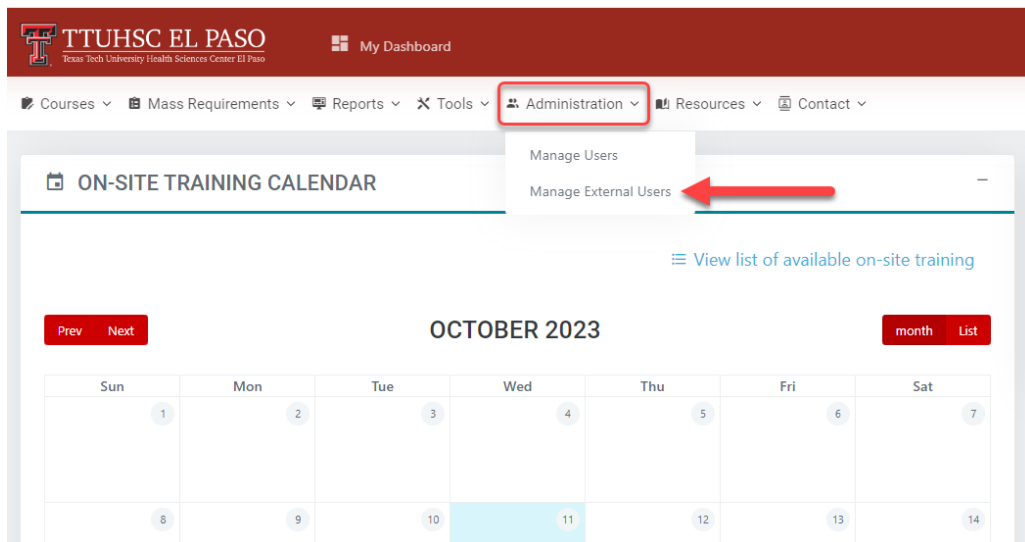
Showing 1 to 10 of 30 entries

ADMINISTRATION - MANAGE EXTERNAL USERS

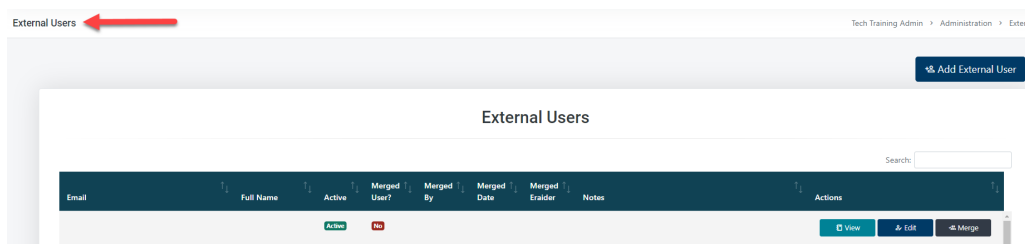
This function will allow you to add an external user (such as staffing agency employees, volunteers, or future faculty that are in the onboarding process), assign courses to the user, and merge the user with an existing TTUHSC EP eRaider account.

Note: The person creating the profile will need to be provided with detailed user information (user full name, personal email, department and trainings that need to be assigned).

- 1) Go to the **Administration dropdown** and click **Manage External Users**.



- 2) Next, you will see the **External Users** screen.



- 3) In the **External Users** page, you will have the following options: **Add External User**, **View**, **Edit**, or **Merge**.

- 4) To add an external user, click on the **Add External User** button.

- 5) This will take you to the **Add External User** page. Fill out the required information fields in the section at the top of the screen.

Note: Required fields are identified by an asterisk ().*

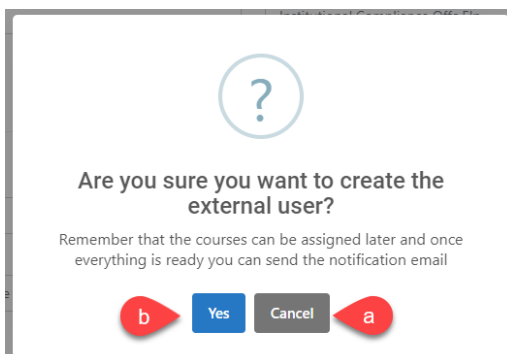
The screenshot shows a web form titled "Add External User". At the top right, there is a blue toggle switch labeled "Active" with a red callout letter 'a'. Below this are several input fields: "Email" (with callout 'b'), "First Name" (with callout 'c'), "Last Name" (with callout 'd'), and "Department" (a dropdown menu with callout 'e'). Below these is a "Notes" field (with callout 'f') containing the placeholder text "Any additional notes to identify the external user".

Below the form is a section titled "Course Assignments" with a refresh icon. It contains three input fields: "Start Date" (07/12/2024), "Due on days" (60), and "Expiration Date" (09/10/2024). Below these is a "Course" dropdown menu showing "NESOP1 Emergency Procedures" and a "+ Add Course" button. At the bottom of this section is a "Save" button.

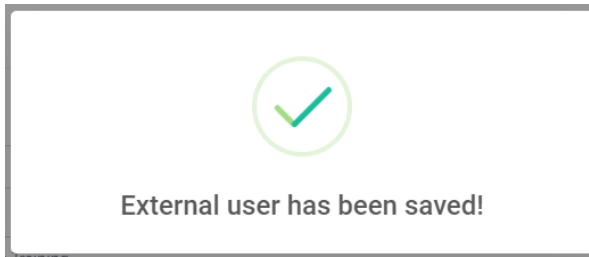
At the very bottom of the form, there is a table header with columns: "Course", "Start Date", "Expiration Date", and "Due on days". The table body is empty, showing "No data found".


- a) **Active** – This will make the user active/inactive. Make sure the toggle button is blue.
 - b) **Email** – Enter the personal email that the user provided or an email the user has access to.
 - c) **First Name** – Enter the user’s full first name.
 - d) **Last Name** – Enter the user’s full last name.
 - e) **Department** – Scroll down in the dropdown field to select the correct department.
 - f) **Notes** – Enter the staffing agency or any relevant notes that pertain to this user.
- 6) Next, you will go to the **Course Assignments** section at the bottom of the screen. Fill out the required fields.

- a) **Start Date** – Enter the date the course is being assigned.
 - b) **Due on days** – Enter the number of days the course will be available to the user.
 - c) **Expiration Date** – This date will self-populate based on the Due on days.
 - d) **Course** – Click on the dropdown menu and select the course you need to assign.
- 7) Once you have completed the required fields, click on the **+ Add Course** button.
 - 8) If multiple courses need to be assigned, follow steps #6 and #7.
 - 9) When you have finished adding the external user’s information and assigning the course(s), click **Save**.
 - 10) Once you click on the **Save** button, you will see the following pop-up notification:
 - a) Click **Cancel** to stay on **Add External User** screen.
 - b) Click **Yes** to proceed.



11) Once you click **Yes** you will see a pop-up notification confirming the user profile has been created and trainings assigned.



12) If you click on the  button in the **External Users** screen, this will take you to the **View External User** screen. This screen will display the user's information as well as all courses that have been assigned to that user.

[View External User](#)

External User Details

Created By: [redacted] / Created Date: 4/14/2023
Last Update By: SelfRegistration / Last Update Date: 5/24/2023

Name: [redacted] Active: True

Email: [redacted]

Departments

Information Services Eip

Assigned Courses

Search:

Course	Start Date	Expiration Date	Due on days	Completed	Locked	Canceled	Actions
Preparing for Internal Research Audits	4/14/2023	6/13/2023	60	No	No	No	Cancel
Box Training	4/14/2023	6/13/2023	60	Yes	No	No	Certificate

Showing 1 to 6 of 6 entries

Log

Search:

Log	Changed By	Changed Date
Password reset email sent	SYSTEM	5/24/2023
Password reset email sent	SYSTEM	5/24/2023

Showing 1 to 4 of 4 entries

13) In the **Assigned Courses** section, you will have the option to **Cancel** a training assignment, **unlock** a training, or print a **Certificate of Completion** for the user.

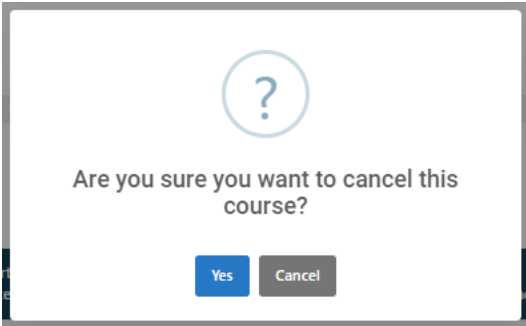
Assigned Courses

Search:

Course	Start Date	Expiration Date	Due on days	Completed	Locked	Canceled	Actions
Preparing for Internal Research Audits	4/14/2023	6/13/2023	60	No	No	No	<input type="button" value="Cancel"/>
Box Training	4/14/2023	6/13/2023	60	Yes	No	No	<input type="button" value="Certificate"/>
Laboratory Safety Essentials	4/14/2023	6/13/2023	60	No	Yes	No	<input type="button" value="Unlock"/>

14) The **Cancel** option will allow you to cancel a training for the user. Please note that the training can only be canceled if the user has not completed the course.

a) If you click on the **Cancel** button in the **Actions** column you will see the following pop-up notification:

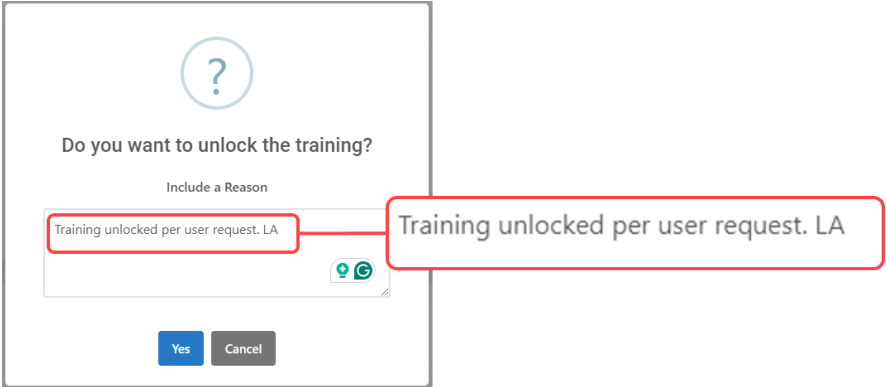


b) Click **Yes** to cancel the course, or click **Cancel** to go back to the **View External User** screen.

15) The **Unlock** option will allow you to unlock a training for the user. Please note that the training can only be unlocked if the user has used all the available attempts.

a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel** to go back to the **View External User** screen. Click **Yes** to proceed.

- Make sure you enter a brief note before confirming **Yes**.



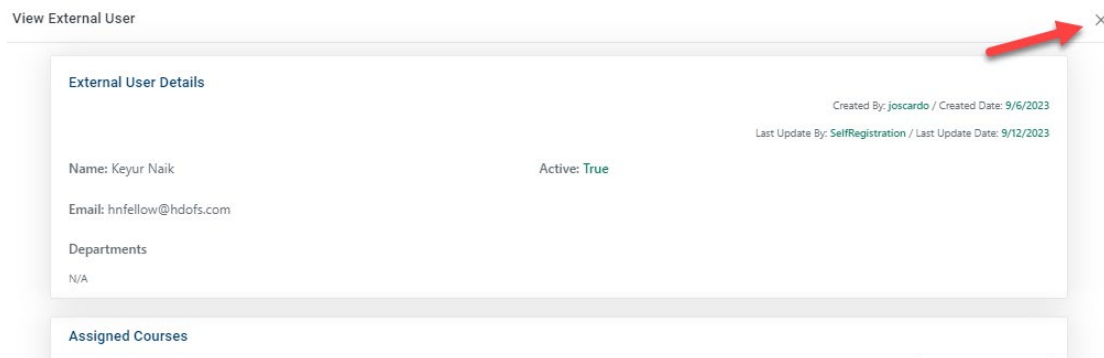
16) The **Certificate** option will allow you to print a Certificate of Completion for the user.

a) When you click on this button you will see the following screen:




b) Click on the **Print** button at the top right side of the page to print the certificate or save it as a PDF.

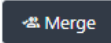
17) To go back to the **External Users** screen, click on the **X** at the top right side of the page.

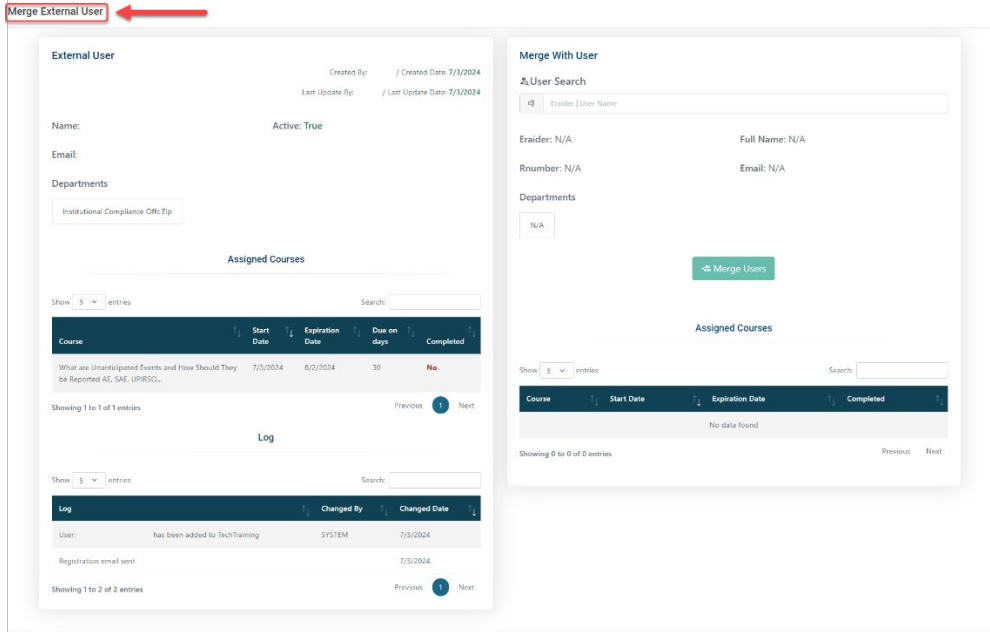


18) If you click on the **Edit** button in the **External Users** screen, this will take you to the **Modify External User** screen. In this screen, you can inactivate the user, update their name or department, or add any additional notes.

19) Once you have made all necessary edits, click on the  button.

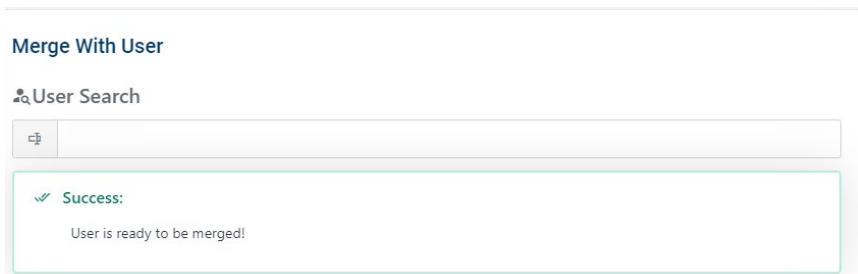
20) To go back to the **External Users** screen, click on the **X** at the top right side of the page.

21) The person who created the external user's profile will need to monitor the external user(s) periodically to determine when to merge the external account with the new TTUHSC EP eRaider account. If you click on the  button you will see the **Merge External User** screen.

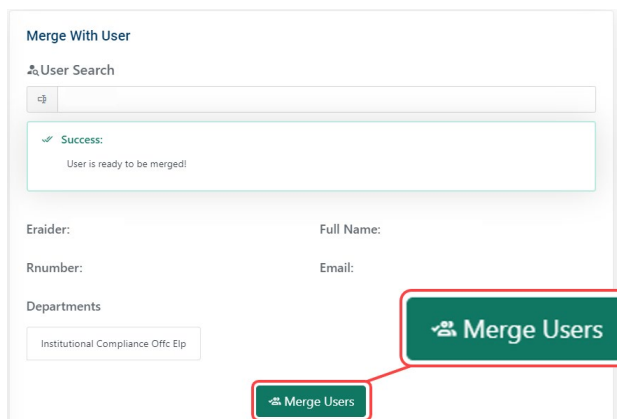


22) Click on the **User Search** box and type the user's Name/eRaider you want to merge. This will populate the user's information.

a) Once you have selected the desired user you will see the message below:



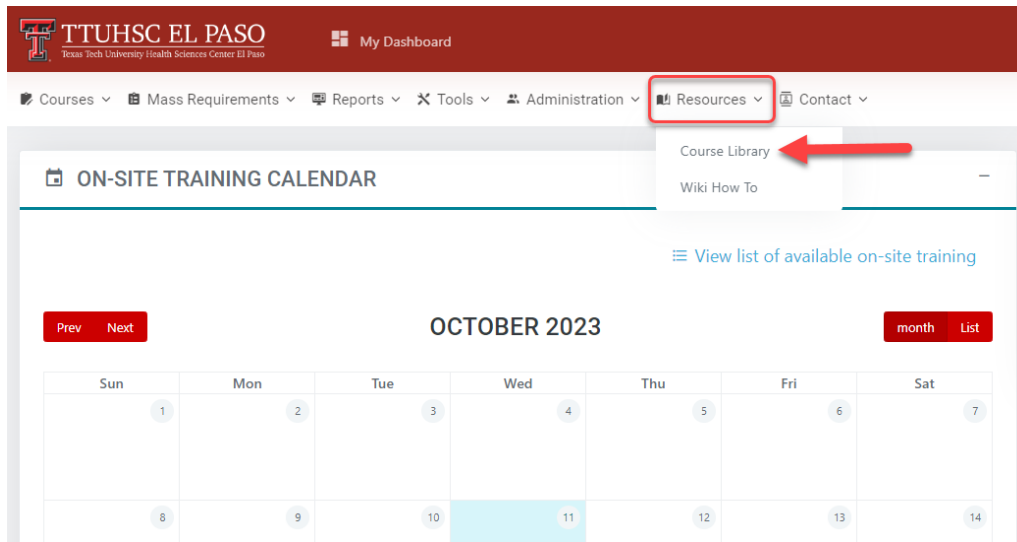
b) Click on the **Merge Users** button to merge the external user with the existing TTUHSC EP eRaider account.



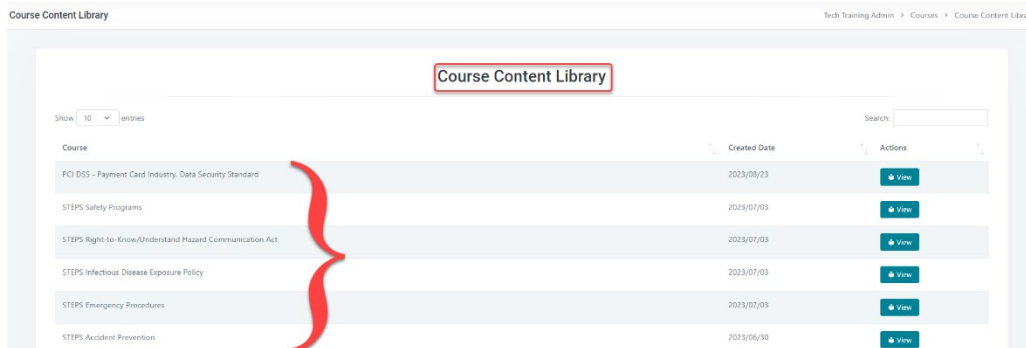
RESOURCES – COURSE LIBRARY


This function will allow the user to see and download the training content without having to retake the course.

- 1) To go to the **Course Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



- 2) This will take you to the **Course Content Library** screen. In this page, you will be able to see all the trainings that have been uploaded.



- a) Click on the  button to view the content for your desired training(s).
- 3) Next, you will see the **Course Content** page which allows you to see the details for that training.
 - a) You can also download the **Course Files** for that course.

PCI DSS - Payment Card Industry, Data Security Standard

Course Details

Alternate Title
PCI DSS - Payment Card Industry, Data Security Standard

Course Description
This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.

Objectives
Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.

Outline
What is PCI DSS?
Third-Party Vendors
PCI DSS Requirements
Security Features
Record Retention
Processing Payment Cards
Precautions
Incident Response
SAQ
Taking Payments Over the Phone
Policies and Procedures

Course Files

PCI DSS - Payment Card Industry, Data Security Standard

File Description:
PowerPoint Presentation

[Download File](#)

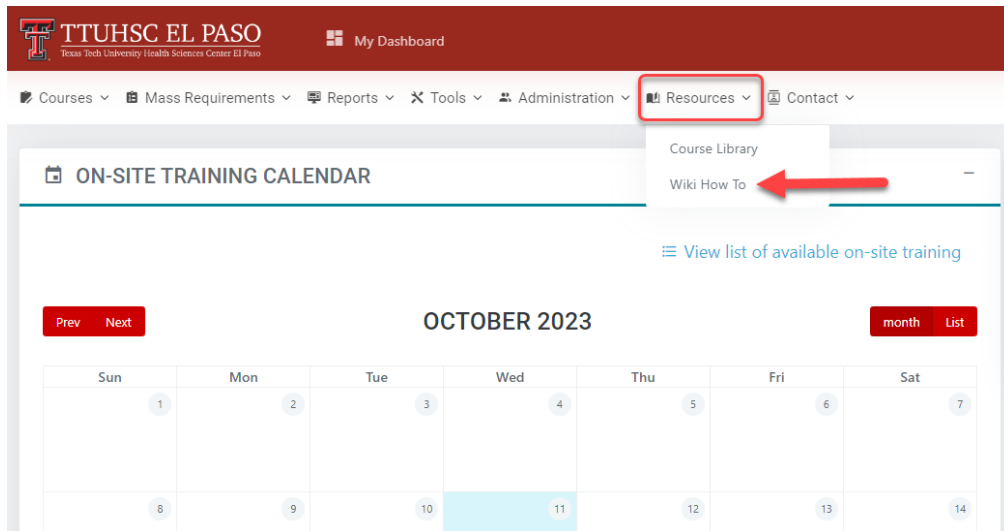
[Download File](#)

RESOURCES – Wiki How To

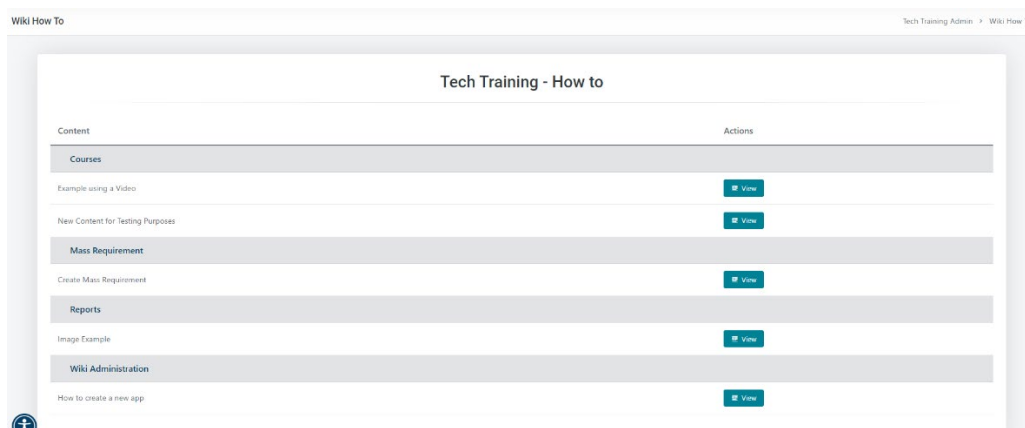
This feature will allow the user to see instructional videos, images or documents on different functions within the Tech Training application.

Note: Functions available vary depending on the user's role.

- 1) Go to the **Resources** dropdown at the top of the page and click on **Wiki How To**.



- 2) This will take you to the **Wiki How To** page. In the **Tech Training – How to** section you can see the instructional videos, documents, and images on various topics.



- 3) To see a specific section, click on the **View** button next to the name of the desired topic. This will display the content for that section.

Content View

Example using a Video

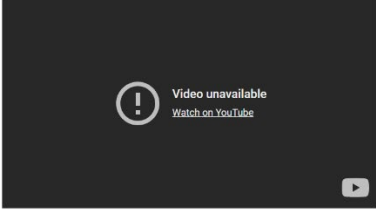
Wiki Details

Application: Tech Training
Category: Courses

Created By:
Created Update Date: 8/29/2023 3:16:30 PM
Updated By:
Last Update Date: 9/26/2023 11:29:46 AM

Wiki Content

EXAMPLE VIDEO 1



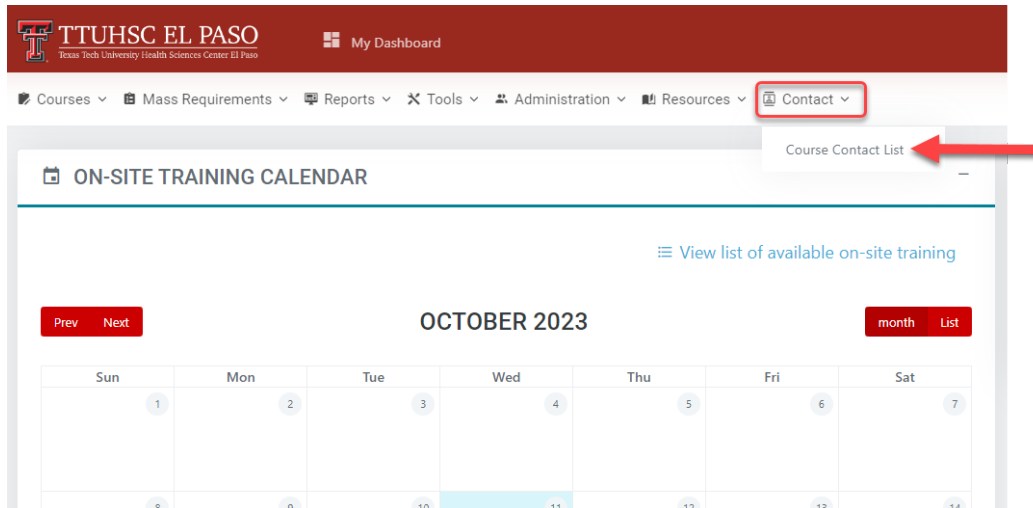
Video unavailable
[Watch on YouTube](#)

TEST 2

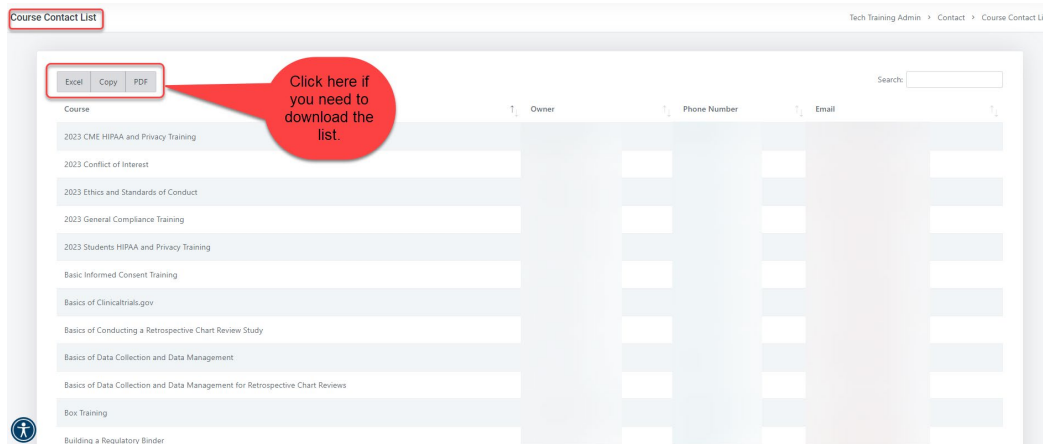
CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

- 1) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.



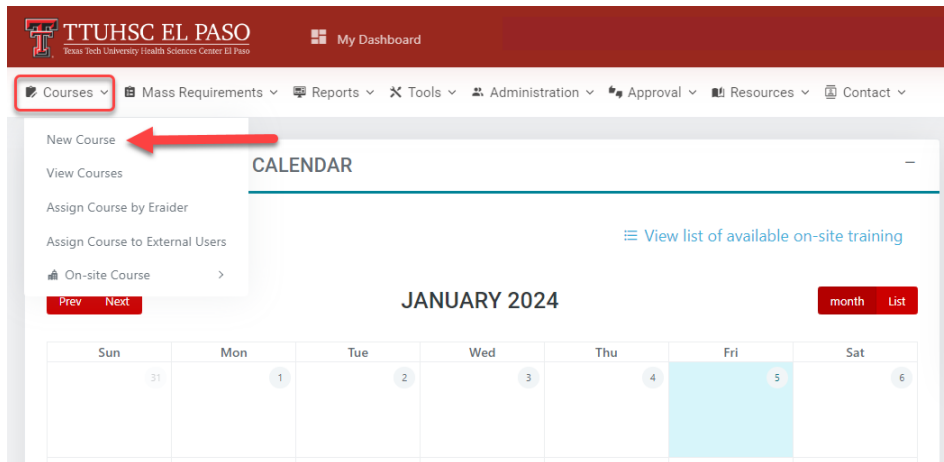
- 2) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number and email.



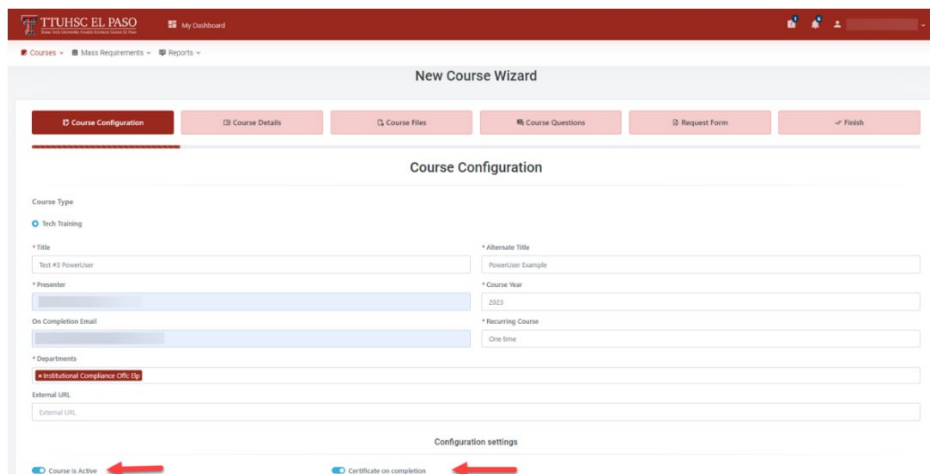
COMMITTEE ROLE – FUNCTIONS

COURSES – NEW COURSE

- 1) To create a course, go to the **Courses** dropdown from the left-hand corner and click on **New Course**.



- 2) You will be directed to the **New Course Wizard** screen. First step is the **Course Configuration** tab.
 - a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*).*
 - Under **Departments**, you can choose all departments or choose a specific department.
 - For **External URL**, use this only if course will have an external source attached. (For example, utilizing YouTube videos or external sites outside of TTUHSC EP website.
 - b) Assure the **Course is Active** and **Certificate on Completion** toggle buttons under **Configuration settings** are **blue**. This will make them active.



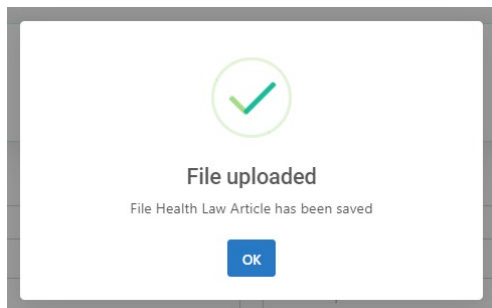
- c) Once the information is completed, click on the **Next step →** button to proceed.
- 3) You will be directed to the next tab, **Course Details**. See below:
- Fill in the required fields. *Note: Required fields are identified by an asterisk (*)*.
 - Then click on the **Next step →** button to proceed.
 - Course Description** – enter a short description of the course.
 - Objectives** – outline the goals for the user upon the completion of this course.
 - Outline** – enter a general description of the course content and instructions.
 - Lockout Message** – enter contact information of person that can unlock the training for user.

The screenshot displays the 'New Course Wizard' interface. At the top, there is a navigation bar with six tabs: 'Course Configuration', 'Course Details' (which is the active tab), 'Course Files', 'Course Questions', 'Request Form', and 'Finish'. Below the navigation bar, the 'Course Details' section is visible. It contains four text input areas, each with a rich text editor toolbar. The first three areas are labeled 'Course Description', 'Objectives', and 'Outline', and each has an asterisk (*) indicating it is a required field. The fourth area is labeled 'Lockout message'. At the bottom left of the form is a 'Return' button, and at the bottom right is a 'Next step →' button.

- 4) Under **Course Files** tab, you will be able to upload the desired files. There is no limit to the number of files you wish to upload.
 - a) Fill in the required fields. *Note: Required fields are identified by an asterisk (*)*.
 - b) Ensure the **Required** toggle button at the bottom left hand corner of the page is **blue**. This will make downloading the course files a requirement.

The screenshot shows the 'Course Files' tab in a navigation bar. Below it, a 'Course File Notes' box contains instructions. The main form has fields for 'File Name' and 'File Description', both with asterisks. A toggle switch for 'Requires file to be downloaded by user?' is set to 'Required'. An 'Upload File' button is at the bottom right.

- 5) Once the files have been uploaded, click **Upload Files**.
 - a) A pop-up box will appear. Click **OK**.



- 6) You may continue uploading additional files. If you are finished, click on the [Next step →](#) button to proceed.
- 7) You will be directed to **Course Questions** tab. This is a two-step process.
 - a) First, answer **1. If a test is required**, check the **Requires test?** checkbox.

Course Questions

Course Question Notes:

- If the course requires a quiz please check **Requires test** and click **save and continue** in order to proceed to next step **Add questions**
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the **Number of questions** field

1- Test required

2- Add Questions

Requires test?

* Number Of Attempts

* Number Of Questions

* Number Of Correct Answers

Configuration Settings

Random Questions

[Save and continue](#)

[← Return](#)

[Next step →](#)

8) Next, you will need to fill in the following fields:

- a) **Number of Attempts** – this field determines how many times the user is allowed to take the test before being locked out.
- b) **Number of Questions** – this field will determine how many questions the user will receive each time the test is taken.
- c) **Number of Correct Answers** – this field will determine the number of questions that must be answered correctly to pass the test.
- d) You will have the option to choose **Random Questions**. It is recommended that you select **Random Questions** so that the user receives a new shuffled set of questions when retaking a test. If you don't choose **Random Questions**, the questions will appear in the same order each time the user initiates the test.

Courses ▾ Mass Requirements ▾ Reports ▾ Tools ▾ Administration ▾ Approval ▾

Course Question Notes:

- If the course requires a quiz please check **Requires test** and click **save and continue** in order to proceed to next step **Add questions**
- Before submitting for approval please review the amount of questions you have for the quiz. It must match the **Number of questions** field

1- Test required

2- Add Questions

Requires test?

* Number Of Attempts

* Number Of Questions

* Number Of Correct Answers

Configuration Settings

Random Questions

[Save and continue](#)

[← Return](#)

[Next step →](#)

9) When the information has been entered in Step 1, click on **Save and continue** button at the bottom of the screen. Then click on [Next step →](#).

10) Next, you will be directed to the **2. - Add Questions** step.

a) Click on **Add New Question** button to start adding questions.

11) This will take you to the section below. Fill out the **+ Add New Question** fields.

- a) **Answer Type** – There are two types of answers: single or multiple. Choose **single** if question only has one correct answer. Choose **multiple** if question has more than one correct answer.
- b) **Question** – The questions can be typed in, or you can cut and paste the questions from a word document. **DO NOT start a question with a number or a letter if you chose the Random Questions.**
 - **Example: 1. Who is the President? or a. Who is the President?**
- c) **Objective** – This section may be left blank or you may add an objective. This is not a required field.
- d) **Media Content** – This section may be left blank if external URLs are not needed.

The screenshot shows the 'Add New Question' interface. It includes fields for 'Answer Type' (set to 'Single'), 'Question', 'Objective', and 'Media Content'. The 'Answers' section is currently empty, featuring a 'Correct Answer?' checkbox and an '+Add Answer' button. A 'Save' button is located at the bottom of the form.

12) Next, go to the **Answer** section:

- a) Type the first possible answer in the **Answer** field (you can also cut and paste the answers from a word document). If this is the correct answer, make sure to click on the **Correct Answer** check box.
- b) If it is not the correct answer, click on the **+Add Answer** box to continue adding possible answers. **DO NOT start an answer with a number or a letter.**
 - Example: 1. True or a. True

This screenshot is similar to the previous one but highlights the '+Add Answer' button with a red arrow. A red circle 'a' is placed next to the 'Answer' input field, and a red circle 'b' is placed next to the '+Add Answer' button.

13) Once you have entered all of the corresponding options for the questions, click on the **Save** button at the bottom of your screen.

14) When you have successfully added the questions and answers and clicked on the **Save** button, the following pop-up notification will appear:

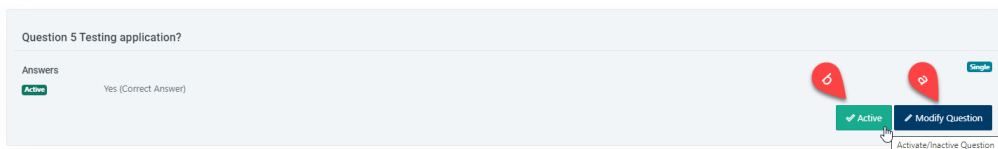
*Note: You will start seeing the questions you added under the **Questions Added** section.*



15) Repeat steps 10 - 14 to continue adding questions.

16) Verify that everything is correct before proceeding to the next step.

- a) If you need to make changes, click on **Modify Question**.
- b) You can **Activate/Inactivate** a question. For example, inactivate a question that was submitted in error or was a duplicate entry.




17) Once everything is correct, click on [Next step →](#) at the bottom of the page.

18) Next, you will be directed to the **Request Form** tab. This is the **Training Request Form** screen. All fields need to be filled in.

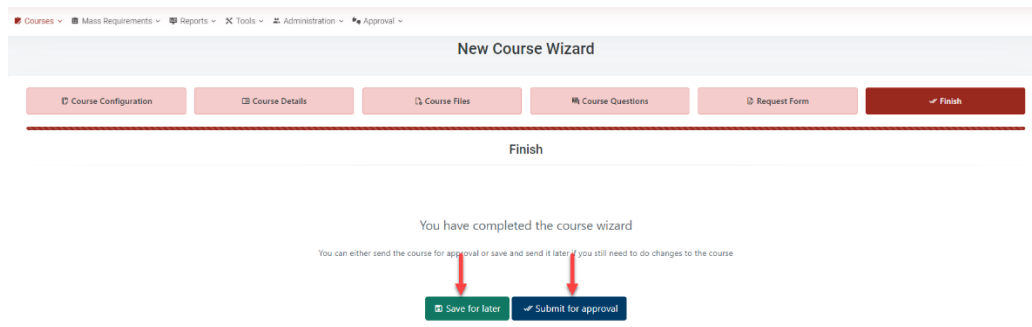
A screenshot of the "Training Request Form" in the TTHSC El Paso system. The form is displayed in a browser window with a navigation bar at the top. The navigation bar includes "Courses", "Mass Requirements", and "Reports". Below the navigation bar, there are several tabs: "Course Configuration", "Course Details", "Course Files", "Course Questions", "Request Form" (which is active), and "Finish". The "Request Form" contains several fields: "Submission Date" (02/07/2023), "Lesson Name", "Name Of Individual Submitting This Form" (Individual Name), "Summation Of Lesson", "Requirement For Training (TJC, state statute, department requirement)", "Target Department (All office workers, clinical staff, everyone, etc)", "Lesson Frequency (One time, annual, bi-annual, etc)", "Assignment Month" (02/07/2023), and "Approval from the individual in your chain of command that reports to the Dean or the President is required. Did you obtain their approval? Please list the name of this individual". At the bottom of the form, there are "Return" and "Next step →" buttons.

- **Submission Date** – Enter date when training is submitted.
- **Requesting Department** – Enter department that owns the training.
- **Lesson Name** – Enter full name of the course.
- **Name of Individual Submitting This Form** – Enter your full name and title.
- **Lesson Duration** – Enter the time it takes for user to complete the training.
- **Summation of Lesson** – Enter brief summary of training.
- **Requirement for Training** – (TJC, state statute, department requirement). Provide Citation if the requirement is statute or TJC.
- **Target Department** – Enter all office workers, clinical staff, everyone, etc.
- **Lesson Frequency** – Determine if training will be assigned one time, annually, bi-annually, etc.
- **Assignment Month** – Enter the date the course is going to be assigned to users.
- **Approval from the individual in your chain of command** that reports to the Dean of the President is required. Did you obtain their approval? Please list the name of this individual.

19) Once this form is completed, click on  at the bottom of the page.

20) The final step in the **New Course Wizard** is the **Finish** tab.

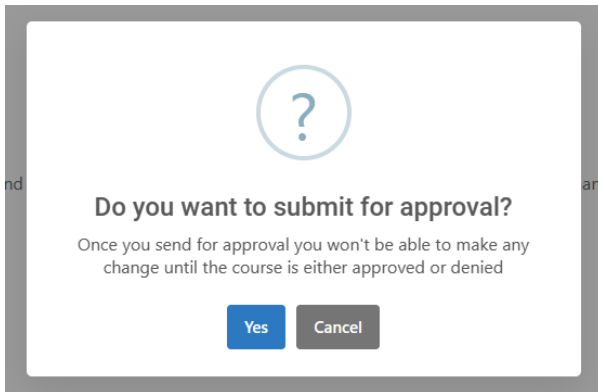
a) In the **Finish** tab, you will have one of two options: **Save for later** or **Submit for approval**.



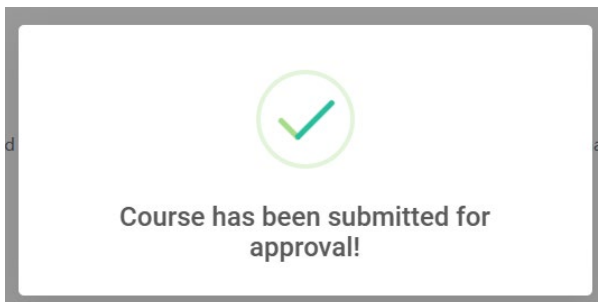
21) When you click the  option, you will see the following pop-up box:

a) If you are ready to submit the course, click **Yes** to submit for approval.

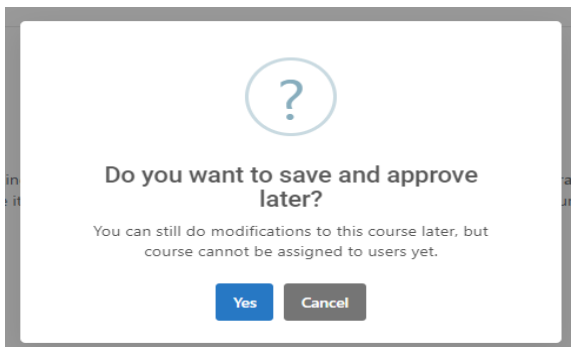
*Note: If you need to back to the **Finish** tab, click **Cancel**.*



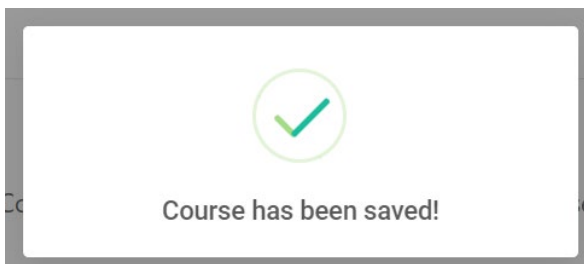
b) Once you click **Yes**, you will see the pop-up screen below confirming the course has been submitted for approval:



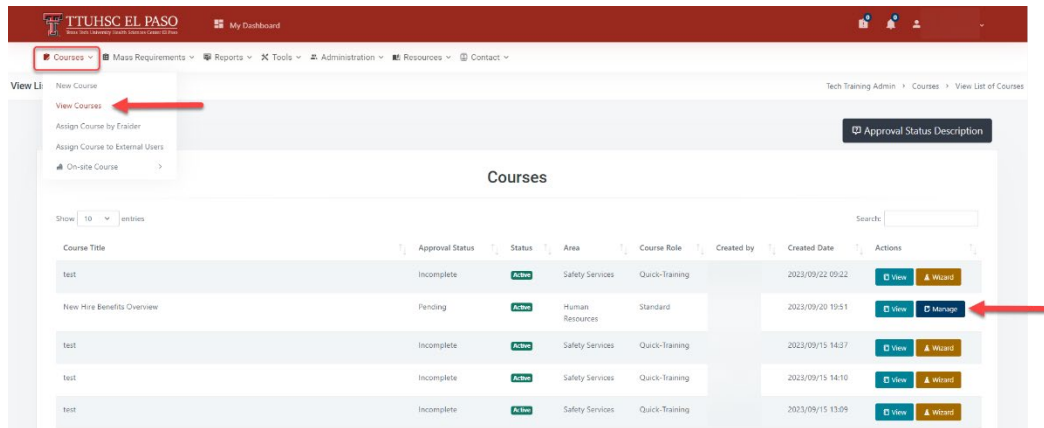
22) If you click on the **Save for later** option, you will see the pop-up box below. Click **Yes** to confirm. *Note: To go back to the Finish tab, click **Cancel**.*



a) When you click **Yes**, you will see the following pop-up box stating the training has been saved:



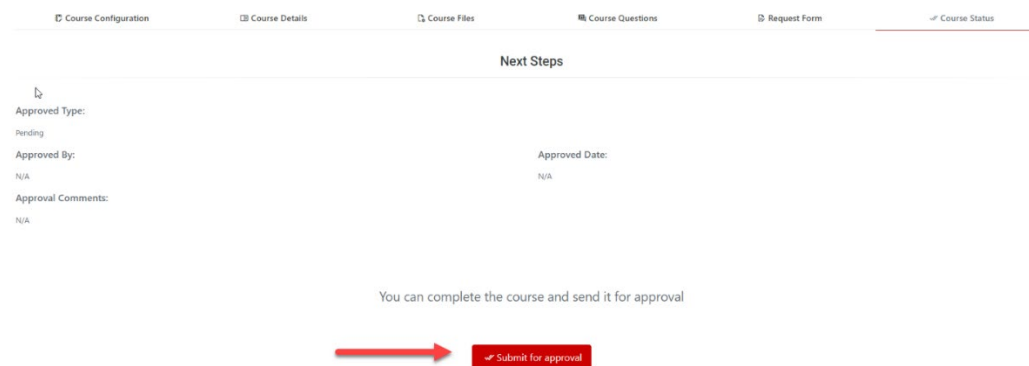
23) If you need to go back to a course that has been saved, click on the **Courses** → **View Courses** section to locate the training. The status under the **Actions** column will change to **Manage**. Click on the **Manage** button to open the training.



24) You will be directed to the **Course Configuration** screen. From here, you can click on any one of the tabs to **modify/update** the information.

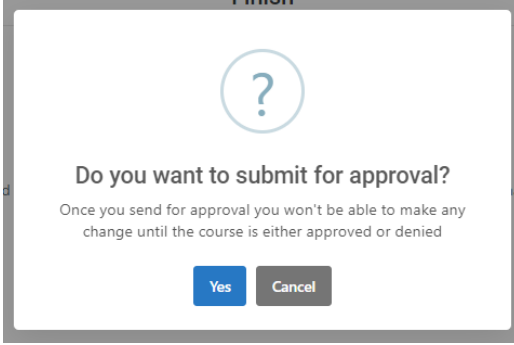
- If you **modify/update** information in one of the tabs, make sure to click on the **Save** button at the bottom of the page.

25) Once you have **modified/updated** the information, go to the **Course Status** tab and click on **Submit for Approval**.



26) When you click on **Submit for Approval**, you will see the pop-up screen below. You may choose to submit the course by selecting **Yes**, or choose **Cancel** to go back to the **New Course Wizard** screen.

27) If you choose **Yes**, you will get another pop-up box indicating that the course has been submitted.



28) Once a course has been **submitted for approval**, an automated email will be sent to the Committee members.

29) When the course has been **approved/denied** by a Committee member, you will receive an automated notification via email.

- Example for when course has been approved:

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
 Sent: Saturday, December 31, 2022 8:31 AM
 To: [redacted]
 Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

Approved By:

Approved Date: 12/31/2022

Comments:

approve

- Example for when course has been denied:

Thu 3/30/2023 4:04 PM
 N no-reply@ttuhsc.edu
 New course approval update

To: [redacted]
 ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

Dear

:

The Course **Testing12** has been **Denied**

Approved By:

Approved Date: 3/30/2023

Comments:

Denied for testing purposes.

If you have any questions regarding the course approval process, please contact the committee for more details.

30) If the course is denied and changes need to be made, go to the **Courses** tab at the top-left side of the page. Click on the **View Courses** section, look for the course and click on **View** button.

- a) In the **Course View** section, you can see the status of the course. If denied, Committee members will indicate the reason for denial under the **Approved Comment** section.

Course View

Approval Step: Approved Approved By: Approved Date: 1/13/2023 4:22 PM

Approved Comment:

I approve yearly course

Course Configuration

Course Type: ACME Year: 2023

Title

2023 Conflict of Interest

- 31) If changes need to be made, you can go to the **Manage** button on the right.

Courses Manage

Show: 10 entries Search:

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Test	Incomplete	Active	Compliance	Standard		2023/04/14 11:15	View Report
Testing12	Denied	Active	Compliance	Standard		2023/03/20 16:00	View Manage
Endowment Training	Approved	Active	Compliance	Standard		2023/03/20 11:38	View Manage
Title IX Sexual Misconduct, and Clery Act	Approved	Active	Compliance	Standard		2023/02/21 09:30	View Manage
FERPA TLUHSC ELP	Approved	Active	Compliance	Standard		2023/02/21 00:00	View Manage
Competency for Reporting Abuse and Neglect for OIU/Sym Staff Only	Approved	Active	Compliance	Standard		2023/02/21 14:02	View Manage
FERPA	Approved	Active	Compliance	Standard		2023/02/16 14:01	View Manage

- 32) Once you have made all necessary edits, you may go to the **Course Status** tab and resubmit the course for approval. (The course will be rerouted to the Committee for approval.)

Course Configuration
 Course Details
 Course Files
 Course Questions
 Request Form
Course Status

Next Steps

Approved Type:

Denied

Approved By:

Approved Date:

3/30/2023 4:03 PM

Approval Comments:

Denied for testing purposes.

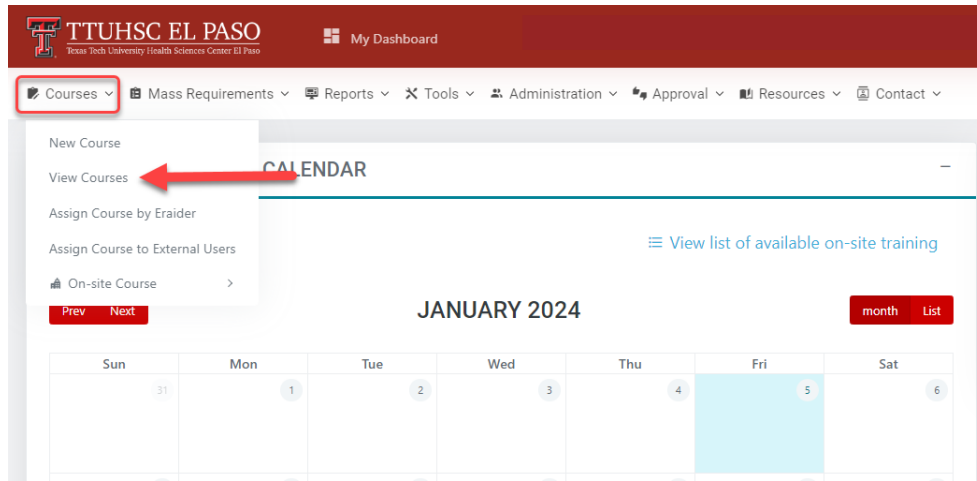
You can complete the course and send it for approval

➔ Submit for approval

Note: The training owner will need to resubmit course each year for Committee approval.

COURSES - VIEW COURSES

- 1) To review courses, click on the **Courses** dropdown menu then click on **View Courses**.



- 2) In the **View Courses** section, you will see a list of all the courses that have been submitted and their **Status**.

Show entries

Course Title	Approval Status	Status	Area	Course Role
What is iRIS and How Do I get an Account?	Approved	Active	Compliance	Standard
Human Trafficking Policy and Awareness	Approved	Active	Compliance	Standard
Test	Pending	Inactive	Compliance	Standard
Contract and Procurement Training	Incomplete	Active	Compliance	Standard
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard
Cash Fund Training	Approved	Active	Compliance	Standard
Cash Fund Training	Incomplete	Active	Compliance	Standard
2023 Conflict of Interest	Approved	Active	Compliance	Standard
2023 General Compliance Training	Approved	Active	Compliance	Standard
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard

Showing 161 to 170 of 188 entries

- 3) The following are the **Course Approval Status Descriptions**:

Course Approval Status Description	
Incomplete	The course has not been configured completely
Pending	The course was saved for later but can still be modified
Completed	The course was submitted for approval
Approved	The course was approved by the committee
Denied	The course was denied by the committee

Close

4) You can also **View**, **Manage** or go to the **Wizard** option for the course.

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Contract and Procurement Training	Incomplete	Active	Compliance	Standard		2023/02/07 12:00	View Wizard Manage
Training Requirements for Clinical Research Personnel	Approved	Active	Compliance	Standard		2023/01/18 10:57	View Manage
Cash Fund Training	Approved	Active	Compliance	Standard		2023/01/11 15:51	View Manage
Cash Fund Training	Incomplete	Active	Compliance	Standard		2023/01/11 15:42	View Wizard
2023 Conflict of Interest	Approved	Active	Compliance	Standard		2023/01/11 09:41	View Manage
2023 General Compliance Training	Approved	Active	Compliance	Standard		2023/01/11 09:14	View Manage
2023 Ethics and Standards of Conduct	Approved	Active	Compliance	Standard		2023/01/09 16:14	View Manage

- a) If you click the **View** option, you will be able to see a full description for the course when you submitted it.
- b) If you click the **Wizard** option, you will be able to update/correct anything from the course. This option will be available when the status is incomplete.
- c) If you click the **Manage** option, you will be able to update/correct anything from the course. This option will be available when the course has been submitted and if denied, you will use this option.

5) When the course has been **approved/denied** by a Committee member, you will receive an automated email notification.

From: no-reply@ttuhsc.edu <no-reply@ttuhsc.edu>
 Sent: Saturday, December 31, 2022 8:31 AM
 To:
 Subject: New course approval update

Dear @FullName@:

The Course 2023_CME HIPAA and Privacy Training has been Approved

Approved By: _____

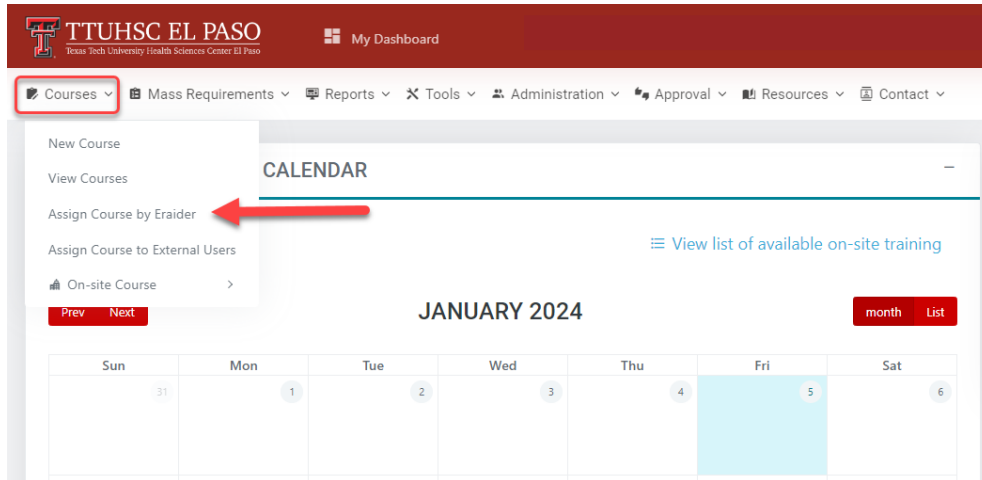
Approved Date: 12/31/2022

Comments:

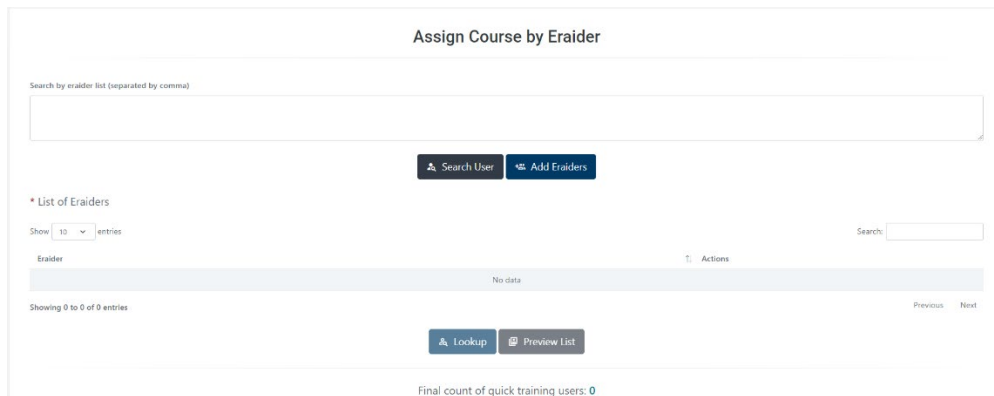
approve

COURSES – ASSIGN COURSE BY ERAIDER

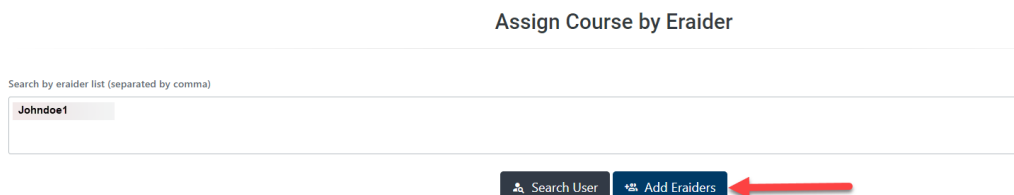
- 1) To assign a course by eRaider, click on the **Courses** dropdown section, located on top of the page, then click on **Assign Course by eRaider**.



- 2) This will take you to the **Assign Course by eRaider** page.

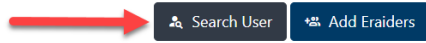


- 3) In the **Search by eRaider list** section, you can enter each eRaider individually (separated by commas). After you have entered all eRaiders that require training, click on **Add eRaiders** box at the bottom of the page.

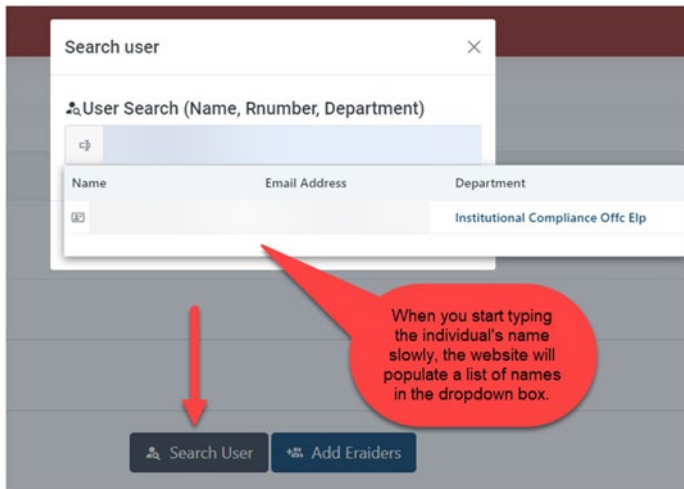


- 4) If you do not know the eRaiders for the individuals that require training, you can look up the individual in the **Search User** box.

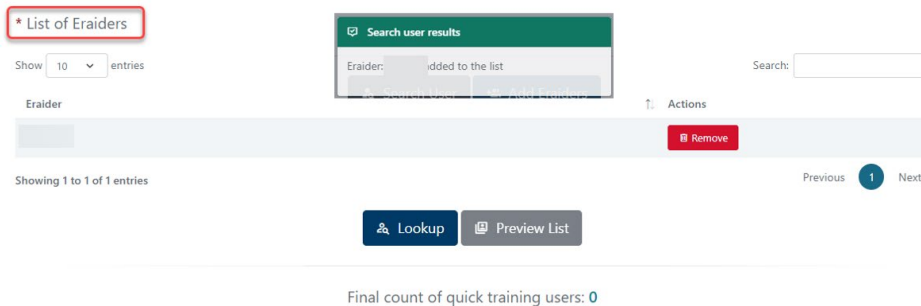
Assign Course by Eraider



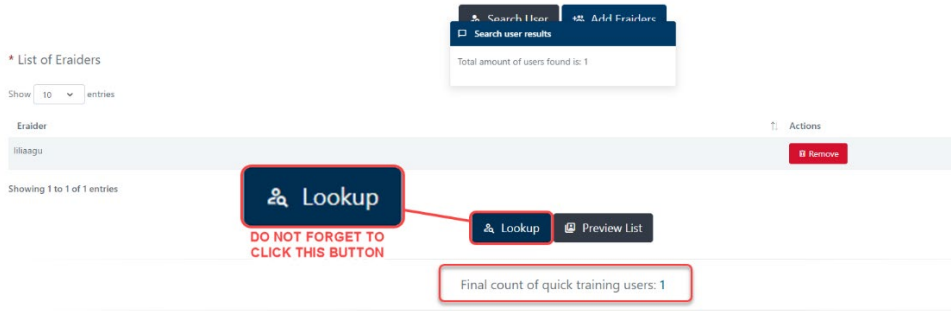
- 5) When you use the **User Search** box, a pop-up window will appear. In this section you can search by **name**, **r number** or **department**. You will have a dropdown list of names to choose from.



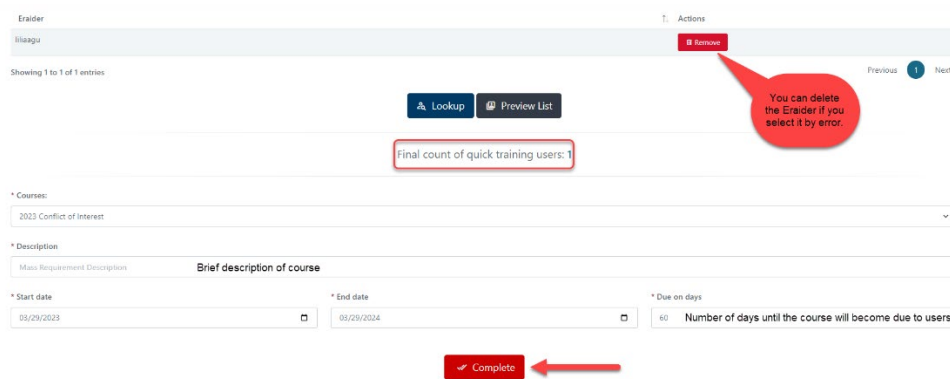
- 6) When you select the individual's name a pop-up screen will appear, after that, their eRaider will be added to the **List of eRaiders** section.



- 7) After making the selection of the users, click on the **Lookup** button. This will give you a count of the users that will have the course assigned.
- If you click on the **Preview List** button, you will see a list of the users that have been selected.

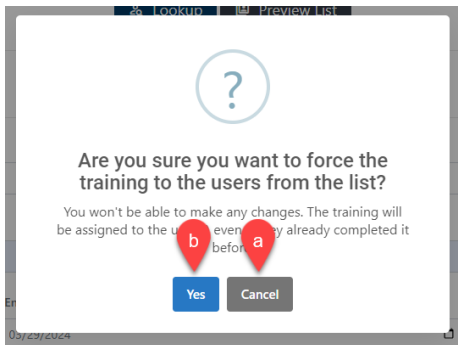


8) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Complete**.

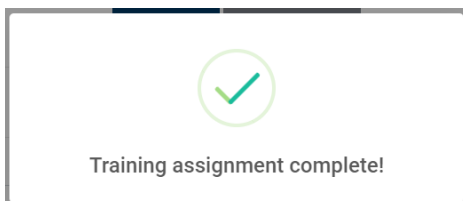


9) Next, a pop-up window will appear.

- a) Click **Cancel** to stay on **Assign Course by Eraider** section.
- b) Click **Yes** to proceed.



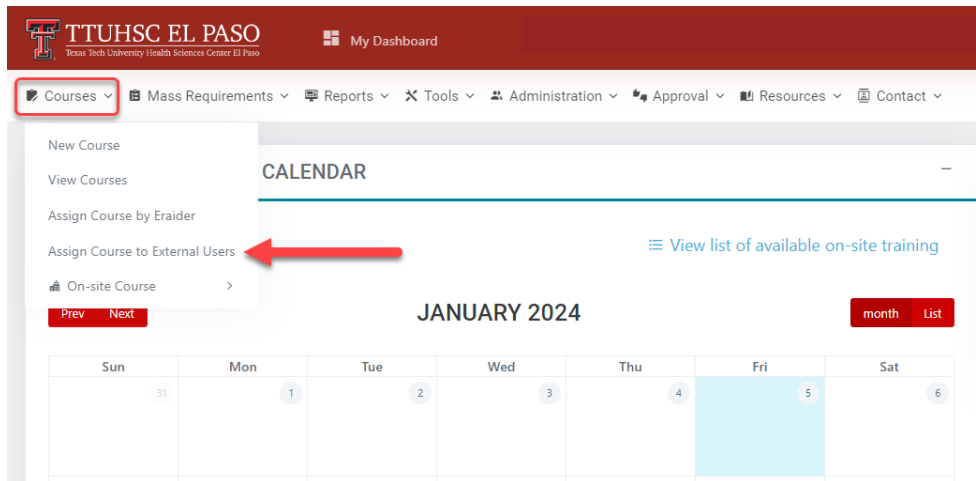
10) A pop-up notification will appear to confirm your submission.



COURSES – ASSIGN COURSE TO EXTERNAL USERS

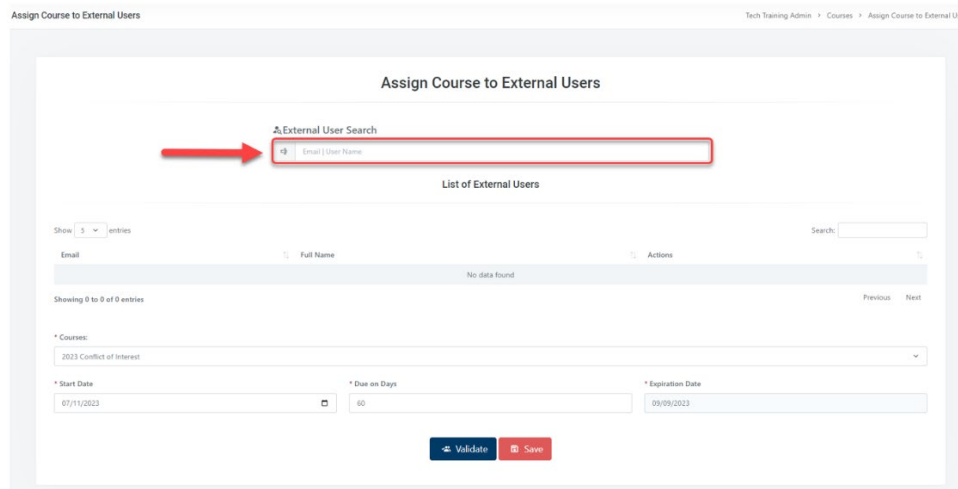
- 1) To assign a course to an external user, click on **Courses** dropdown section, located on top of the page, then click on **Assign Course to External Users**.

Note: Remember, this feature is only available for an existing external user. If the external user hasn't been created, refer to the [Manage External Users](#) section.

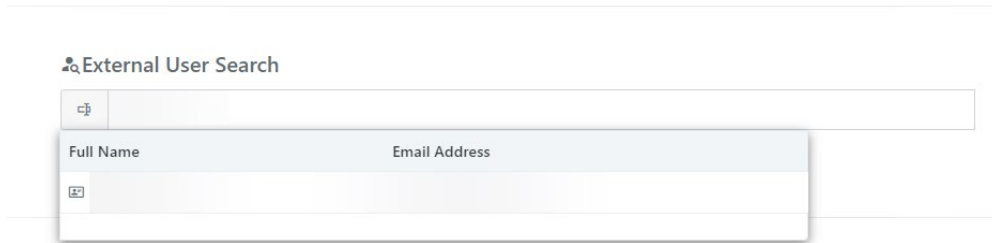


- 2) This will take you to the **Assign Course to External Users** page.

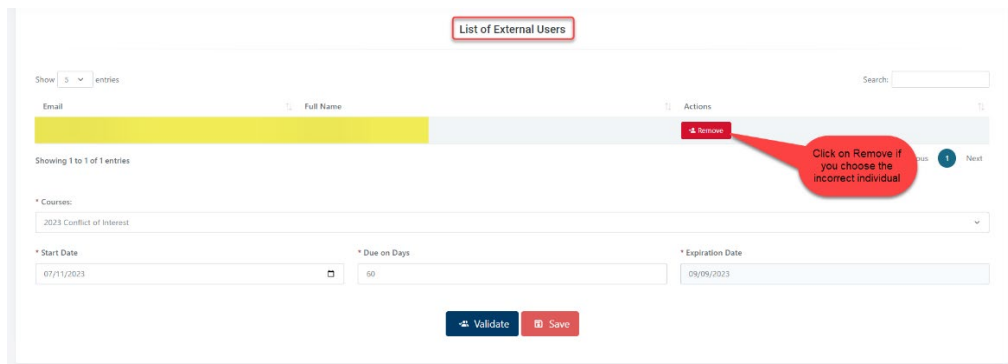
*Note: This option will allow you to search by **email, last name or first name** only.*



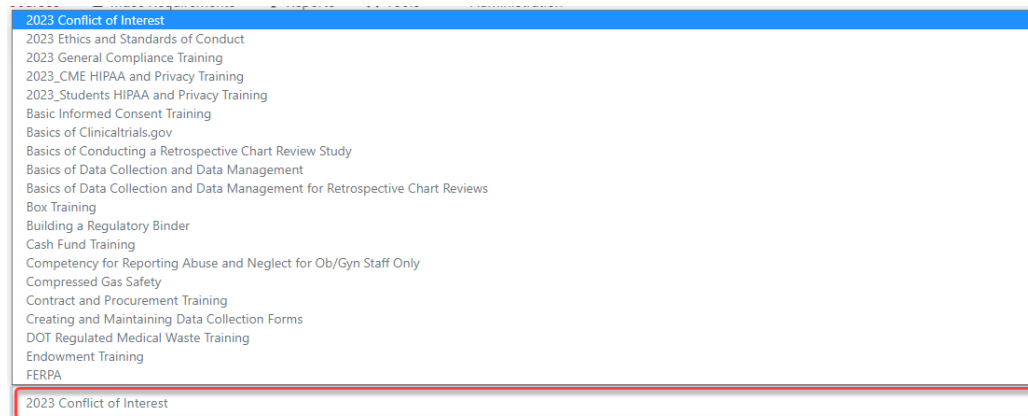
- 3) Next, type the name or email of the external user in designated field. A list of names will appear in a dropdown box. Click on the name of the individual.



- 4) This will add the name to the **List of External Users**. Fill out the required fields.
Note: Required fields are identified by an asterisk ().*



- 5) In the **Courses** dropdown box, you will have a list of trainings that can be assigned. Select the required course.



- 6) You can change the **Start Date**, **Expiration Date** and **Due on Days**.

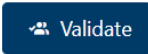
Note: if you change the Due on Days, the Expiration Date will be updated automatically.

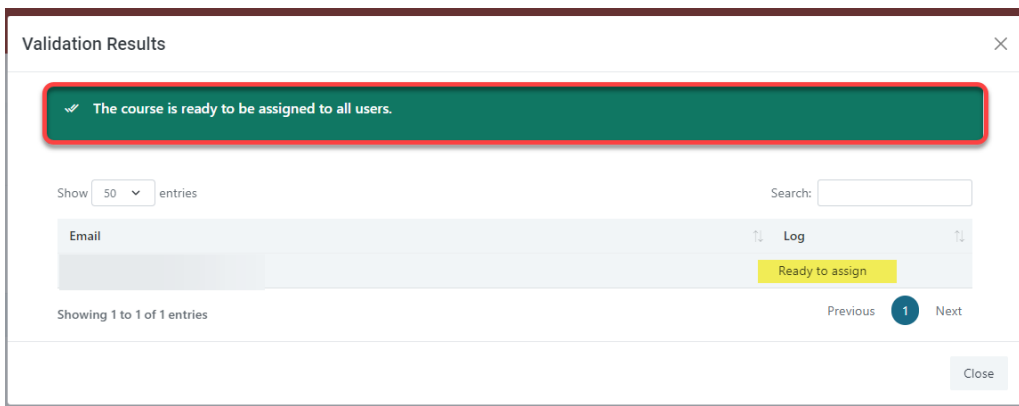
Before


* Start Date	* Due on Days	* Expiration Date
07/11/2023	60	05/09/2023

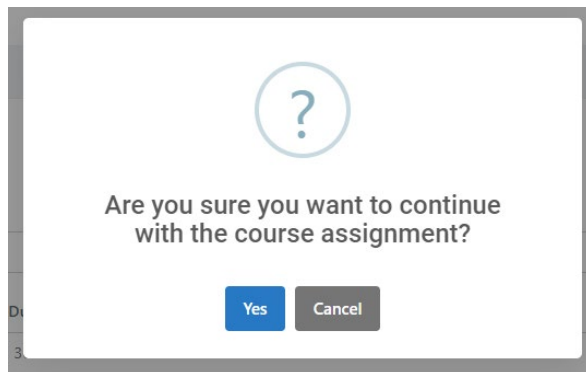
After

* Start Date	* Due on Days	* Expiration Date
07/11/2023	30	08/10/2023

- 7) Next, click on the  button.
- 8) A pop-up message will appear stating that the courses have been assigned to the users. *Note: If the course has already been assigned, a red pop-up notification will state this. If multiple trainings will be assigned to an individual, repeat steps 5-7.*



- 9) Next, click on the  button at the bottom of the page.
- 10) A pop-up box will ask you if you are sure to continue. Click **Yes** to continue and **Cancel** to go back.



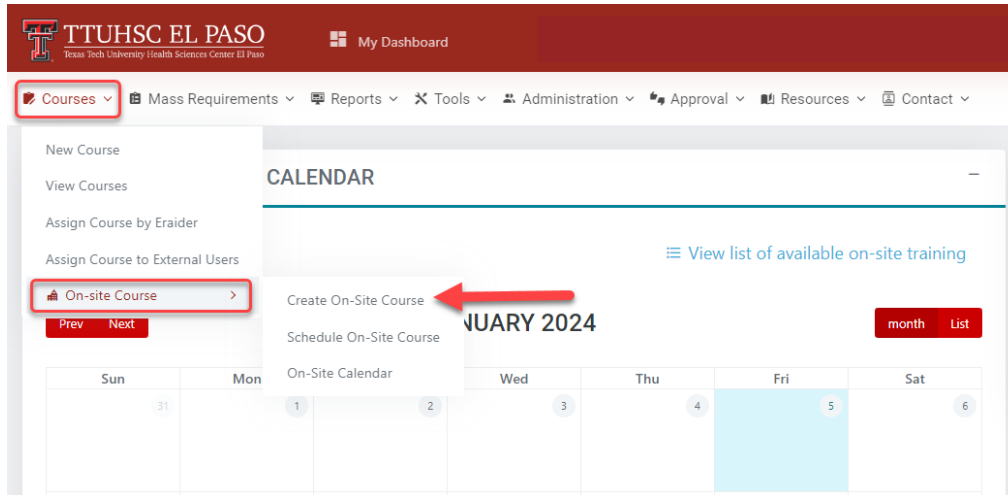
- 11) To verify that you have successfully assigned the training(s), go to **Manage External Users** and click on **View**. For more information on this, please refer to the [ADMINISTRATION – Manage External Users](#) section.

COURSES – CREATE ON-SITE COURSE

This feature will allow the user to create a course outline for individuals to register for a live, WebEx or online training session. Individuals will be able to self-enroll via the Tech Training application calendar.

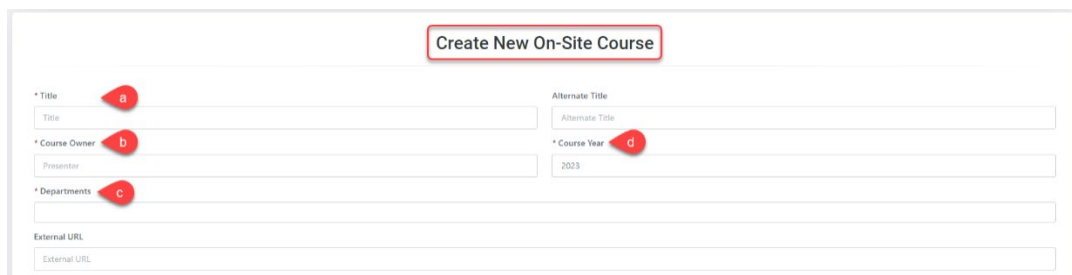
Note: This feature will only be available for PowerUser, Administrator, and Committee roles.

- 1) To create an On-Site Course, click on the **Courses** dropdown → **On-Site Course** → then click on **Create On-Site Course**. You will see the following screen:



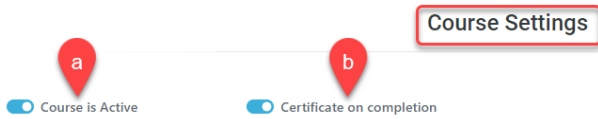
- 2) You will be directed to the **Create New On-Site Course** screen. Fill out the required fields. *Note: Required fields are identified by an asterisk (*).*

- a) **Title** – Enter your desired title.
 - **Alternate Title** – This field can be left blank or you can type in the same as the Title.
- b) **Course Owner** – Type the name of the person presenting the training.
- c) **Departments** – Choose the departments that will be able to see the course.
- d) **Course Year** – Select the current year.

The screenshot shows the 'Create New On-Site Course' form. It has a title bar 'Create New On-Site Course'. The form contains several input fields: '* Title' (with a red circle 'a'), 'Alternate Title', '* Course Owner' (with a red circle 'b'), '* Course Year' (with a red circle 'd'), and '* Departments' (with a red circle 'c'). There are also fields for 'External URL'.

- 3) Next, scroll down the page and in the **Course Settings** section:

- a) Leave the **Course is Active** toggle button blue if you want everybody to see the course. If disabled, only the individuals with Administrator and PowerUser role will be able to see the course.
- b) Leave the **Certificate on completion** toggle button blue so the users can download the certificate after passing the training.

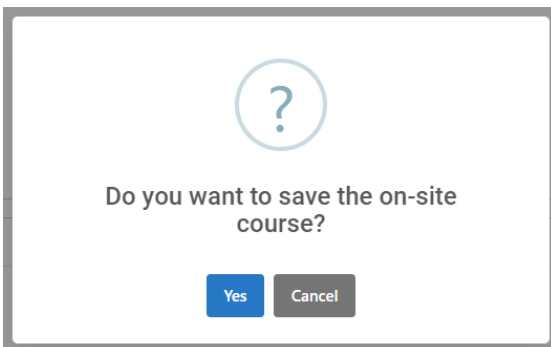


4) In the **Course Details** section, fill out the required fields. *Note: Required fields are identified by an asterisk (*)*.

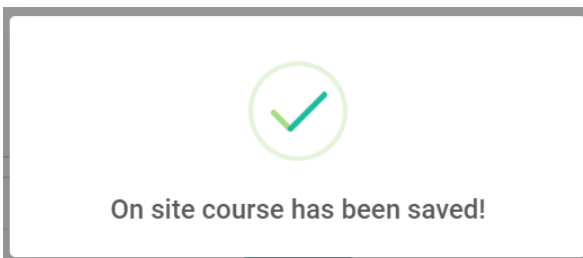
- a) **Course Description** – enter a short description of the course.
- b) **Objectives** – outline the goals for the user upon the completion of this course.
- c) **Outline** – enter a general description of the course content and instructions.

5) Click on the  **Save** button to continue.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the **Create New On-Site Course** screen, click **Cancel**.*



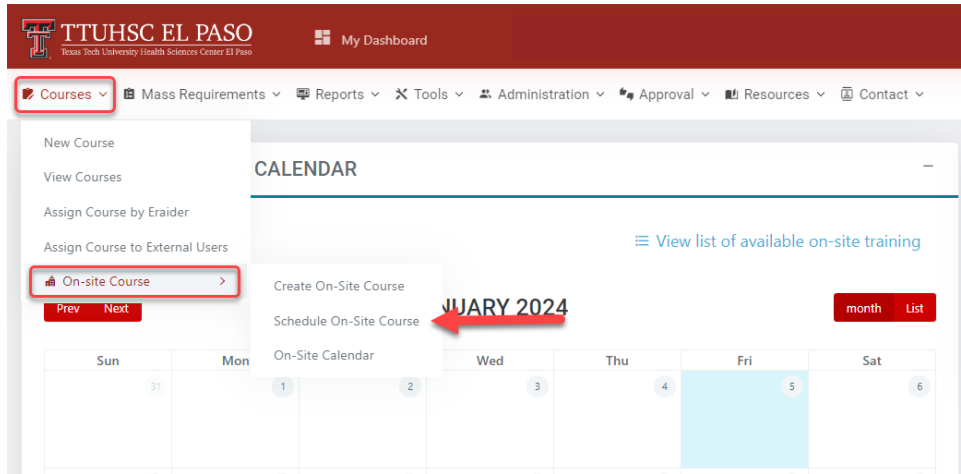
7) Once you click **Yes**, you will see the pop-up screen below confirming the course has been saved.



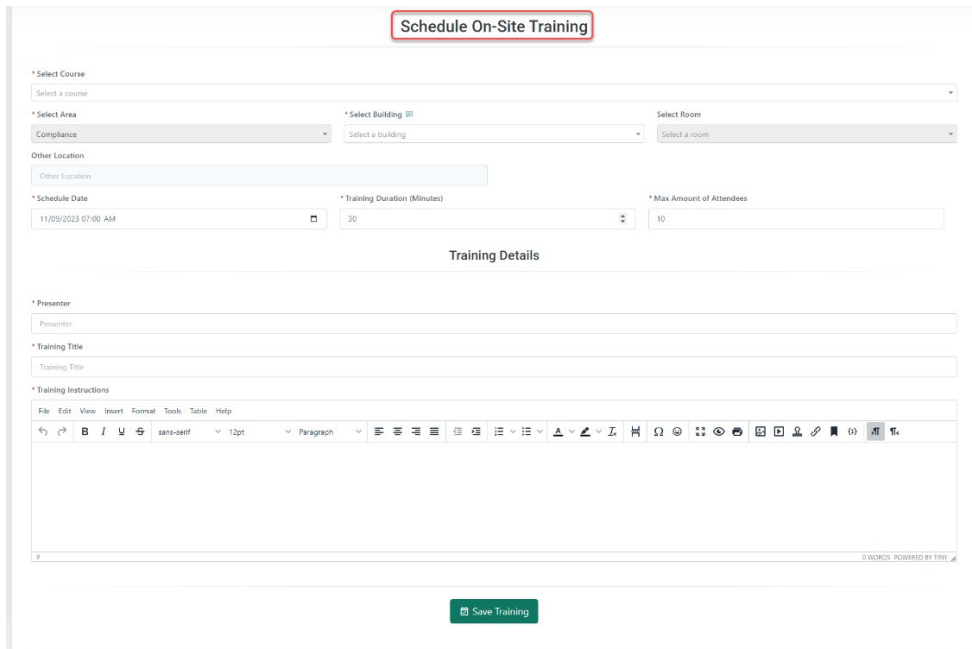
COURSES – SCHEDULE ON-SITE COURSE

This feature will allow users to set a time and place for the On-Site courses created.

- 1) To set a time and place for your course, click on the **Courses** dropdown → **On-Site Course** → then click on **Schedule On-Site Course**.



- 2) You will be directed to the **Schedule On-Site Training** screen.

The screenshot shows the 'Schedule On-Site Training' form. The title 'Schedule On-Site Training' is highlighted with a red box. The form includes several fields: '* Select Course' (dropdown), '* Select Area' (dropdown with 'Compliance' selected), '* Select Building' (dropdown), 'Select Room' (dropdown), 'Other Location' (text field), '* Schedule Date' (date field with '11/09/2023 07:00 AM'), '* Training Duration (Minutes)' (dropdown with '30'), and '* Max Amount of Attendees' (text field with '10'). Below these fields is a section titled 'Training Details' with fields for '* Presenter' (text), '* Training Title' (text), and '* Training Instructions' (rich text editor with a toolbar). A 'Save Training' button is located at the bottom of the form.

- a) **Select Course** – In the dropdown field, select the training you created.
- b) **Select Area** – This field will automatically populate with your department.

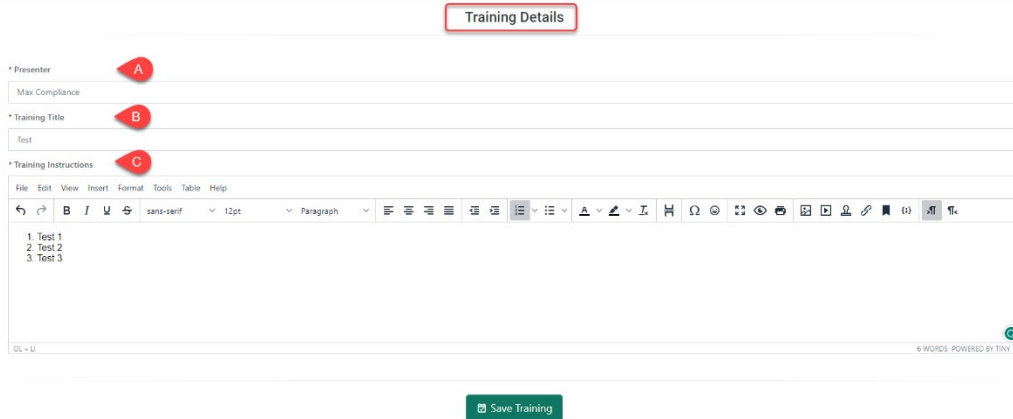
- c) **Select Building** – In the dropdown field, select the building that the training will be scheduled at for users to attend. If your desired building is not listed, select the **Other** option. Once the building is selected, you will be able to select the room.
 - **Select Room** – In the dropdown field, select the room number.
 - **Other Location** – If you choose the **Other** option in the **Select Building field**, type your desired building and room number.

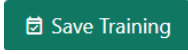
- 3) Scroll down and fill in the following fields.
 - a) **Schedule Date** – Select the date and time of the training session.
 - b) **Training Duration** – Indicate the length of time, in minutes, the training will take.
 - c) **Max Amount of Attendees** – Indicate the maximum amount of people that can attend the training session.

- 4) Next, go down the page and in the **Training Details** section, fill out the required fields.

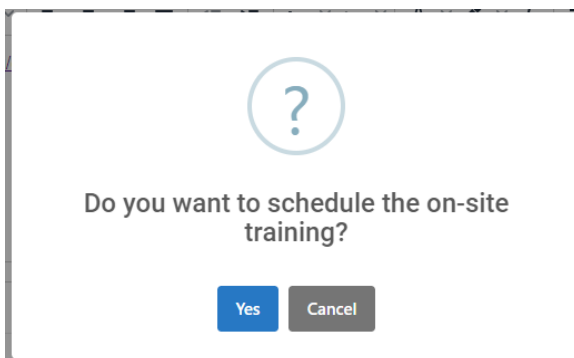
Note: Required fields are identified by an asterisk ().*

- a) **Presenter** – Name of the person who is presenting the training.
- b) **Training Title** – Type the name of the course you created.
- c) **Training Instructions** – Indicate what the users are going to do in the training session or if they will need to log in to web-based training.

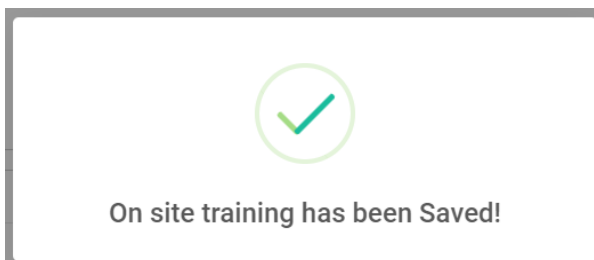


5) When you are ready, click on the  button.

6) A pop-up will appear, click **Yes** if you are ready to save the course. *Note: If you need to back to the Schedule On-Site Training screen, click **Cancel**.*



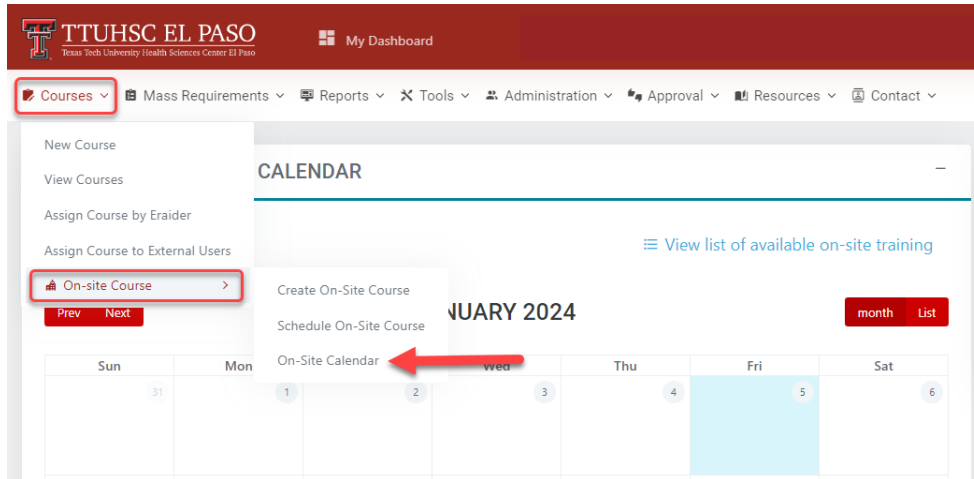
7) Once you click **Yes**, you will see the pop-up screen below confirming the On-Site training has been saved.



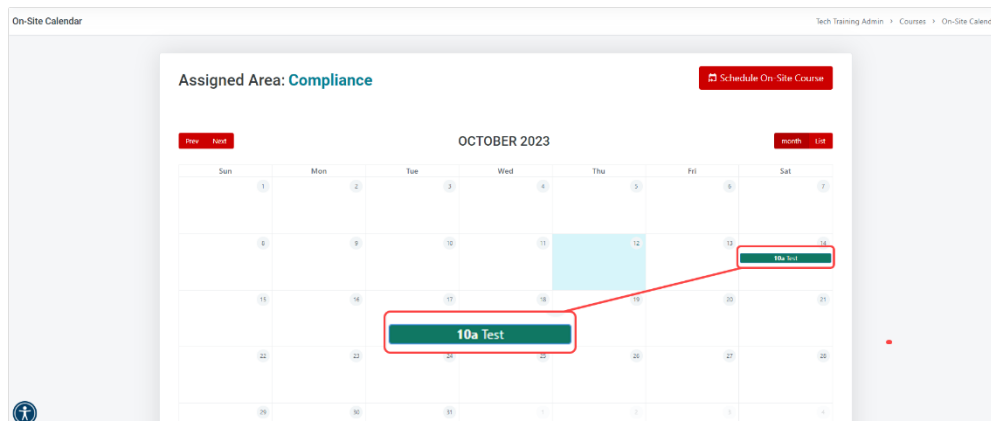
COURSES – ON-SITE CALENDAR

This feature will allow the user to modify/update the **On-Site Training** details such as the course, the area, location, duration, training instructions, etc.

- 1) To see the **On-Site Calendar**, click on the **Courses** dropdown → **On-Site Course** → then click on **On-Site Calendar**.



- 2) You will be directed to the **On-Site Calendar**. The available courses will appear in the calendar.
 - a) If you want to see the details for that course, click on the name of the course.



- 3) Next, you will see the **Event View** screen. In this page you will be able to see all details for that course.

Event View Event View

Assigned Area: Compliance Status: Active

Training Details

Training Title
Text

Presenter: Max Compliance Max Amount of Attendees: 10

Schedule Date: Saturday, October 14, 2023 10:00 AM Location: CBS Building Conference Room 1A123

Training Duration: 60 Minutes

Training Instructions

1. Test 1
2. Test 2
3. Test 3

Course Details

Title
Text

Alternate Title

Owner Course Year: 2023

External URL
N/A

Course Description
Text

Objectives
Text

Outline
Text

Modify X Close

- 4) To modify/update the information for the course, click on the Modify button at the bottom of the page.
- 5) You will be directed to the **Re-schedule On-Site Training** page. You can change/update the building, location, date, duration, and number of attendees, presenter, title, and instructions.

Note: Do not forget to click on Save Training if you change/update any information. You can also cancel the training if desired.

- a) To see the list of attendees, click on the [Total Attendees List](#) link at the top of the page. You will see the following list:

Attendees List

Attendance Notes: ×

By clicking yes the user will get a record of having completed this training successfully

Excel Copy PDF Search:

Erailer	User Name	Email	Enrolled Date	Attended?	Log
			10/12/2023	<input checked="" type="checkbox"/> Yes	N/A

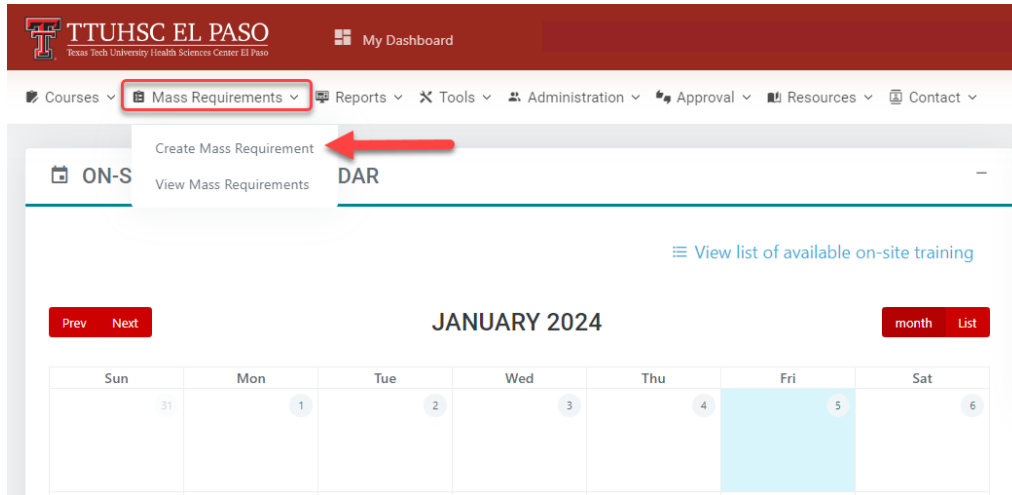
Showing 1 to 1 of 1 entries Previous 1 Next

Note: If the training has ended, you can no longer make changes to the training.

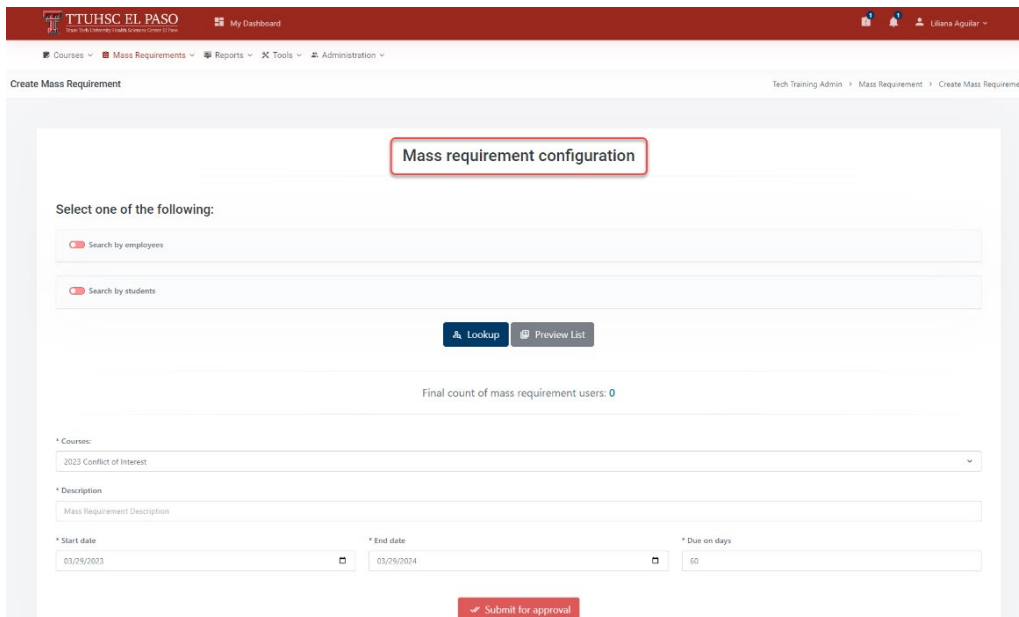
- b) At this point, the presenter can confirm attendance by modifying the **Yes** toggle button in the **Attended?** Column.

MASS REQUIREMENT - CREATE A MASS REQUIREMENT

- 1) To assign a Mass requirement, click on the **Mass Requirements** dropdown at the top of the page, then click on **Create Mass Requirement**.



- 2) This will take you to the **Mass requirement configuration** page.



- 3) To use the **Search by employees** option:
 - a) In the **Applies to** dropdown menu, you will be able to select **All Employees**, **Existing employees only** or **New employees only**.
 - The **All Employees** option will allow you to select all employees.

Courses ▾ Mass Requirements ▾ Reports ▾

Mass requirement configuration

Select one of the following:

Search by employees

Notes:

- If "All employees" is selected all other parameters will be ignored
- If "All employees" is selected new and current employees will be searched

* Applies to

- All Employees
- All Employees**
- Existing employees only
- New employees only

b) If you select **Existing employees only** or **New employees only**, you will have the option to choose **All Staff** or **All Faculty**. You may select both options at the same time, if needed.

Search by employees

Notes:

- If "All employees" is selected all other parameters will be ignored
- If "All employees" is selected new and current employees will be searched

* Applies to

Existing employees only ▾

Select one or more (Optional)

All Staff All Faculty

c) If you select **Existing employees only** or **New employees only**:

- You will have the option to select the department under the **Select a department** dropdown box and the positions under the **Select a position** dropdown box.

Select one or more (Optional)
 All Staff All Faculty

Employee targeting (Optional)

Select a department 

Institutional Compliance Offc Elp

⇄

Select a position 

Senior Safety Officer

Senior Office Assistant

⇄

When you make a selection, the department/position will move over to the column on the right side, this indicates the specific field has been selected.

If you select the incorrect department/position, from the right column, click on the name and it will unselect it.

4) To use the **Search by students** option:

- a) In the **Applies to** dropdown section you will have 3 options: **All Students**, **Existing students only** and **New students only**.
- The **All Students** option will allow you to select all students.

Search by students

Notes:

- If "All students" is selected all other parameters will be ignored
- If "All students" is selected new and current employees will be searched

* Applies to

All Students

All Students

Existing students only

New students only

b) If you select **Existing Students only** or **New students only**:

- You will have the option to select any **college / program**. Click on the desired college / program under the **Select a college** and **Select a program** dropdown boxes.

Student targeting (Optional)

Select a college

Select a program

When you make a selection, the department/position will move over to the column on the right side, this indicates the specific field has been selected.

If you select the incorrect college/program, from the right column, click on the name and it will unselect it.

- 5) After making the selection of the users, click on the **Lookup** button. This will give you a count of the users that will be assigned to the mass requirement. If you click on the **Preview List** button, you will see a list of the users that will be assigned to the mass requirement.

DO NOT FORGET TO CLICK THIS BUTTON Final count of mass requirement users: 1936

- 6) Next, you will scroll down to the bottom portion of the **Mass requirement configuration**.

a Courses: 2023 Conflict of Interest

b Description: Mass Requirement Description

c Start date: 03/31/2023

d Due on days: 60

Submit for approval

- a) The **Courses** section will have a dropdown menu where you can select the course you need.

* Courses:

2023 Conflict of Interest
2023 Conflict of Interest
2023 Ethics and Standards of Conduct
2023 General Compliance Training
2023_CME HIPAA and Privacy Training
2023_Students HIPAA and Privacy Training
Basic Informed Consent Training
Basics of Clinicaltrials.gov
Basics of Conducting a Retrospective Chart Review Study
Basics of Data Collection and Data Management
Basics of Data Collection and Data Management for Retrospective Chart Reviews
Box Training
Building a Regulatory Binder
Cash Fund Training
Competency for Reporting Abuse and Neglect for Ob/Gyn Staff Only
Creating and Maintaining Data Collection Forms
Endowment Training
FERPA
FERPA TTUHSC ELP
Human Trafficking Policy and Awareness
Informed Consent Process Do's and Don'ts

b) Enter a brief **description** in this section:

* Description Brief description of mass requirement

Mass Requirement Description

c) **Start date** – Enter the current date.

*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

d) **End date** – Enter the last day of the current calendar year. This ensures that the course remains active for the calendar year. (Remember, each calendar year you will be required to upload the course and obtain Committee approval.)

e) **Due on days** – Enter the number of days the users have to complete the course.

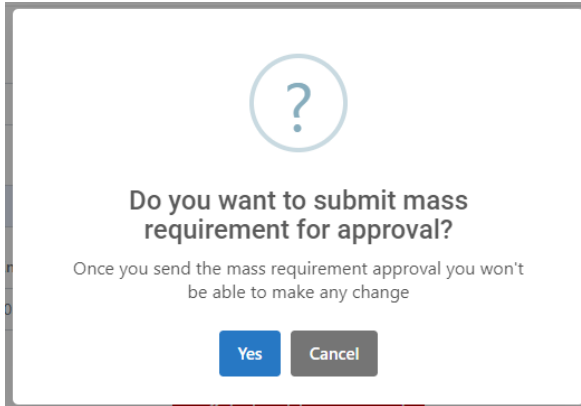
* Start date	* End date	* Due on days
<input type="text" value="03/31/2023"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="60"/>

7) Once you have entered all the required fields, click on the ✔ Submit for approval button at the bottom of the page.

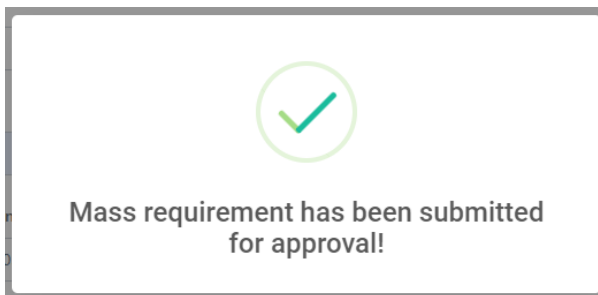
8) You will see the following pop-up:

a) If you are ready to submit the mass requirement, click **Yes** to submit for approval.

*Note: If you need to back to the **Finish** tab, click **Cancel**.*



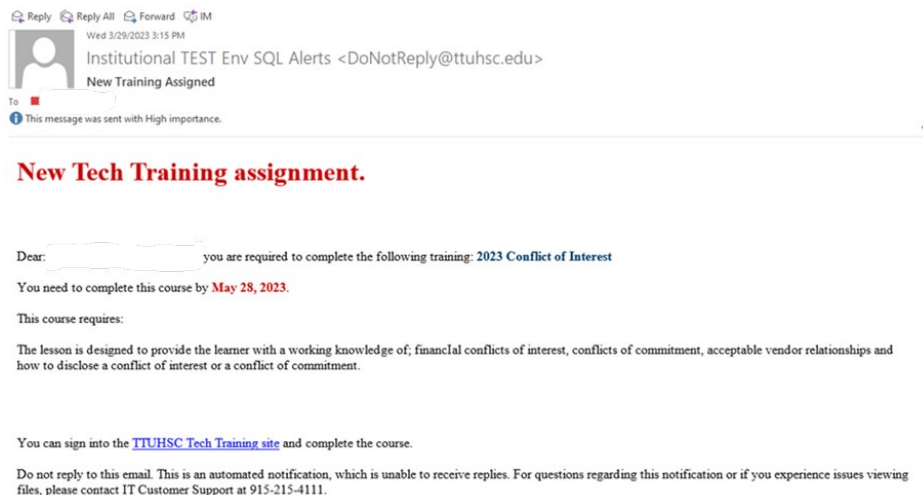
9) If you click **Yes**, you will see the following notification:



10) The **Mass Requirement** will need to be approved by the Committee before the training is assigned.

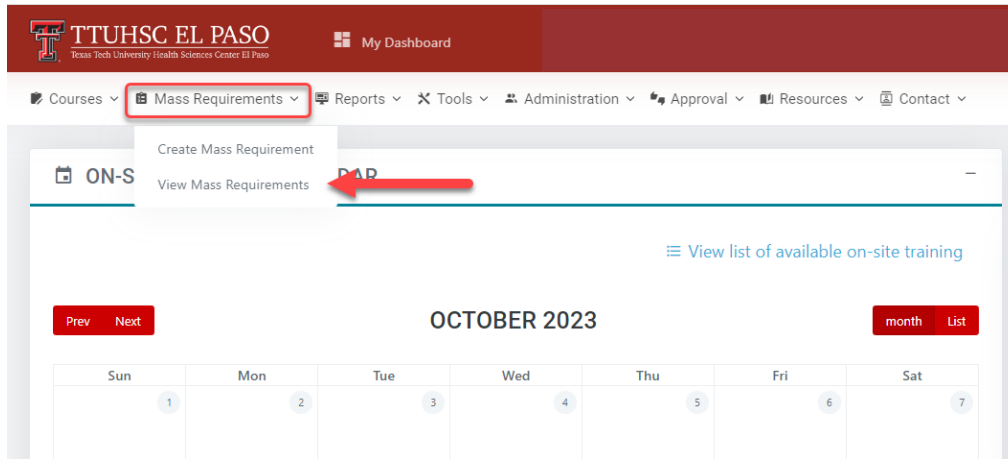
11) To check on the Mass Requirement approval status, refer to the **Mass Requirement Report**.

12) Once the **Mass Requirement** has been approved by the Committee, the users will receive an email notification stating the training has been assigned.



MASS REQUIREMENT – VIEW MASS REQUIREMENT

- 1) To check the status of a mass requirement, go to the **Mass Requirement** dropdown and click on **View Mass requirements**.



- 2) This will take you to the **Mass Requirement List** where you can check the status of the assignment in the **Approval Status** column.

Mass Requirement List

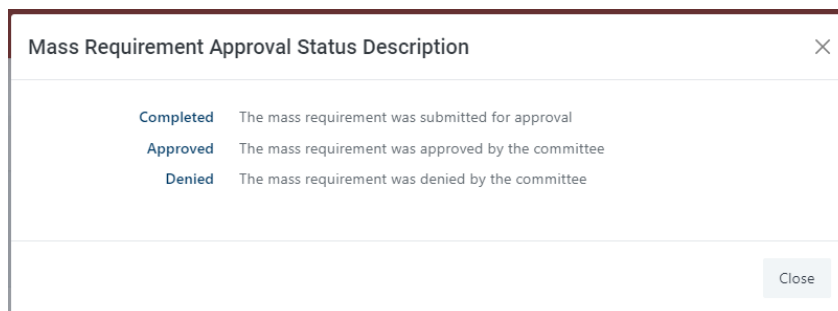
Show 10 entries

Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
For research and IRS purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/08 14:10	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	fmaya	2023/02/07 14:34	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	fmaya	2023/02/07 14:34	View Log
For research and IRS purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/06 16:38	View Log
For research and IRS account purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/06 16:37	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	fmaya	2023/02/06 11:32	View Log
TST EDGAR	TEST QUICK TRAINING	Approved	No	Safety Services	Quick-Training	esosamar	2023/02/03 18:02	View Log
For research and IRS accounts	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/02/02 16:47	View Log
Cash Fund Training	Cash Fund Training	Approved	No	Compliance	Standard	fmaya	2023/01/24 16:54	View Log
for research and IRS purpose	Basic Informed Consent Training	Approved	No	Compliance	Standard	cyperaza	2023/01/24 15:22	View Log

Showing 1 to 10 of 44 entries

Previous 1 2 3 4 5 Next

- a) Click on the top right side of the page to see the **Approval Status Descriptions**.



- 3) In the **Actions** column, you can select **View**, **Log** or **Cancel** buttons.

Mass Requirement List

Show 10 entries

Search:

Mass Requirement Type	Course Title	Approval Status	Canceled?	Area	Course Role	Created by	Created Date	Actions
Assignment of LSE course	Laboratory Safety Essentials	Completed	No	Safety Services	Quick-Training		2023/04/13 11:26	View Log Cancel
Required to work in laboratory/be added	Laboratory Safety Essentials	Completed	No	Safety Services	Quick-Training		2023/04/13 11:08	View Log Cancel

- a) If you click on the **View** button, you will be able to look at detailed information entered in the **Mass Requirement**.

Mass Requirement View

Approval Step: **Approved** Approved By: Approved Date: 5/19/2023 12:00 AM

Comments
No Approval necessary

Mass Requirement Configuration

Course title
Refresher Training - Emergency Procedures EP-2023

Mass Requirement Description
Mass requirement to insert refresher AP-2022 completed trainings

Area: Safety Services Created by:

Course Role: Standard Created date: 5/19/2023 12:00:00 AM

Start date: 1/1/2022


End date: 1/1/2022

Amount of impacted users: **2056**

- b) The **Log** button will show you the **Course Log**. This section will display the history of the **Mass Assignment**.

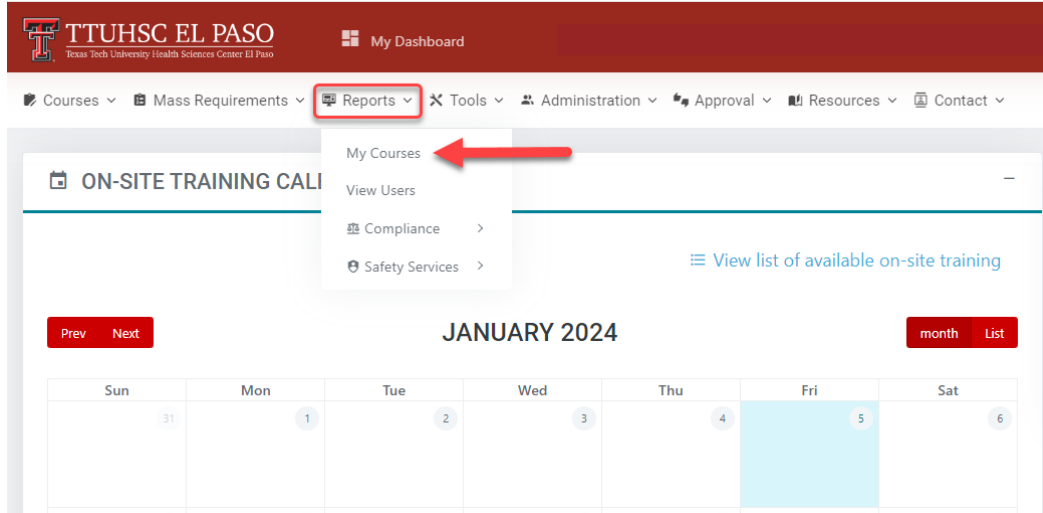
Course Log

Log Type	Log	Changed By	Changed Date
ManageCourse	Course status changed to: Approved by: julgaer on: 1/13/2023 4:22:11 PM		1/13/2023 4:22 PM
ManageCourse	Course status changed to: Completed by: acankovi on: 1/11/2023 10:08:47 AM		1/11/2023 10:08 AM
ManageCourse	Question changed from: The appearance of a Conflict of Interest is defined as: to: The appearance of a Conflict of Interest can be defined as:		1/11/2023 9:59 AM
ManageCourse	Question changed from: A faculty member must be present before a health care vendor can interact with students and/or residents or fellows about their products. to: A faculty member must be present before a health care vendor can interact with students, residents or fellows about their products.		1/11/2023 9:57 AM
ManageCourse	Question changed from: If you engage in research you will also have to complete a disclosure form for the TTUHSC El Paso Conflict of Interest in Research Committee (COIRC) to: If you engage in research you will have to complete a disclosure form for the TTUHSC El Paso Conflict of Interest in Research Committee (COIRC)		1/11/2023 9:57 AM
ManageCourse	Question changed from: A faculty member must be present before a Health Care Vendor can interact with students and/or residents or fellows about their products. to: A faculty member must be present before a health care vendor can interact with students and/or residents or fellows about their products.		1/11/2023 9:56 AM

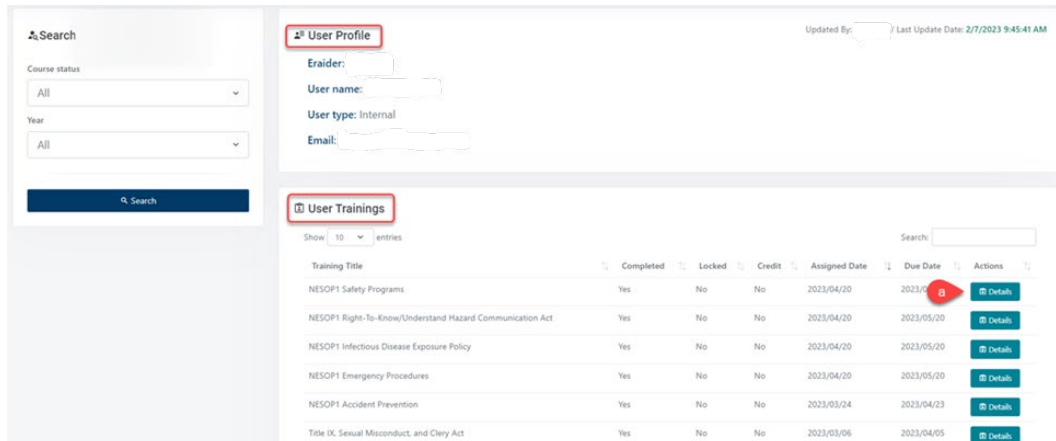
- c) The  button will delete the mass requirement.

REPORTS – MY COURSES

- 1) To check your profile and course status, click on **Reports** dropdown section, located on top of the page, then click on **My Courses**.



- 2) Next, you will see the following page. In this page you will find your personal information such as the **User Profile** and the **User Trainings**.



- a) Under the **Details** button, you can get detailed information of the trainings you have been assigned. You can also **Download a certificate of completion**.

Training View

Current Status: **Completed**

Training

Course
NISOPI Accident Prevention

Year: 2023

Recurring: One time

Requires Test: Yes

Number of questions on Quiz: 10

Number of correct questions on Quiz: 8

My training details

Assigned Date: 3/24/2023

Due Date: 4/23/2023

Attempts: 1

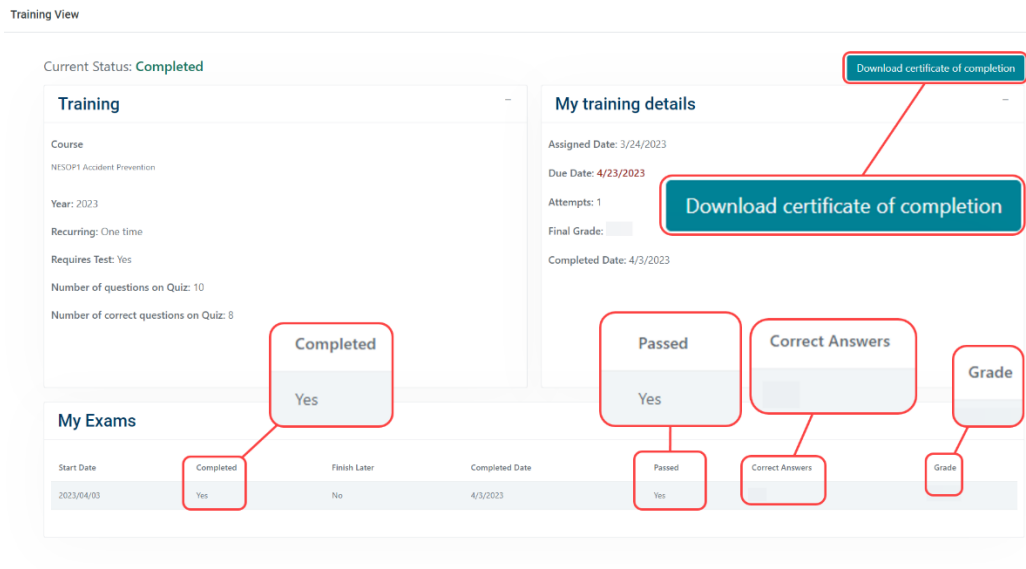
Final Grade:

Completed Date: 4/3/2023

[Download certificate of completion](#)

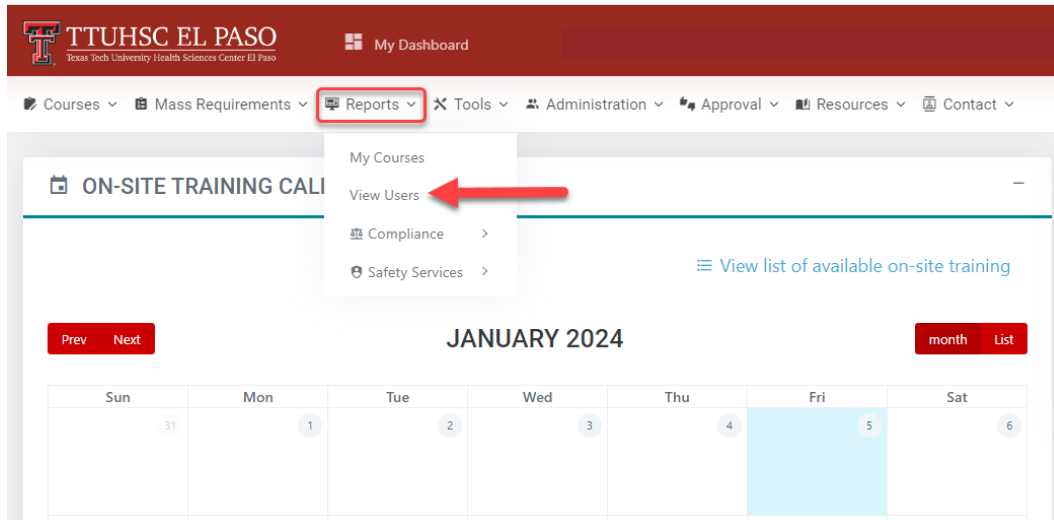
My Exams

Start Date	Completed	Finish Later	Completed Date	Passed	Correct Answers	Grade
2023/04/03	Yes	No	4/3/2023	Yes		

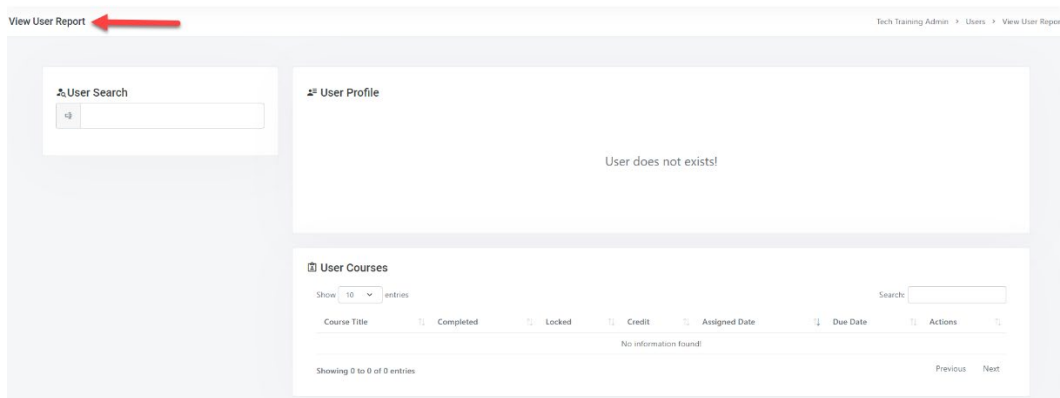


REPORTS – VIEW USERS

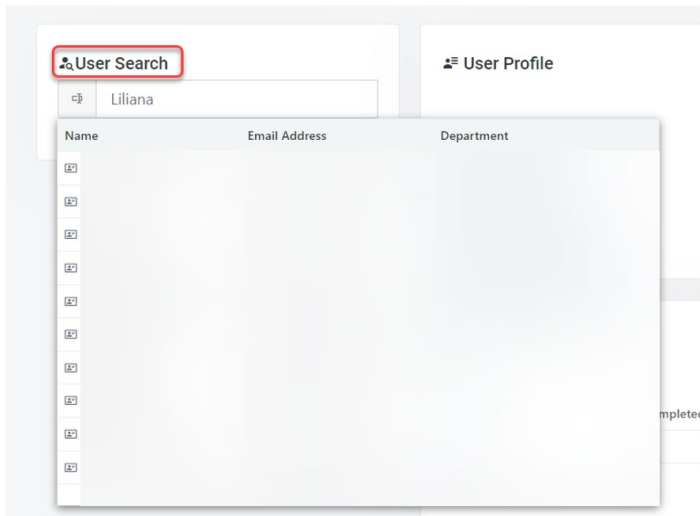
- 1) To search for users, click on **Reports** dropdown section, located on top of the page, then click on **View Users**.



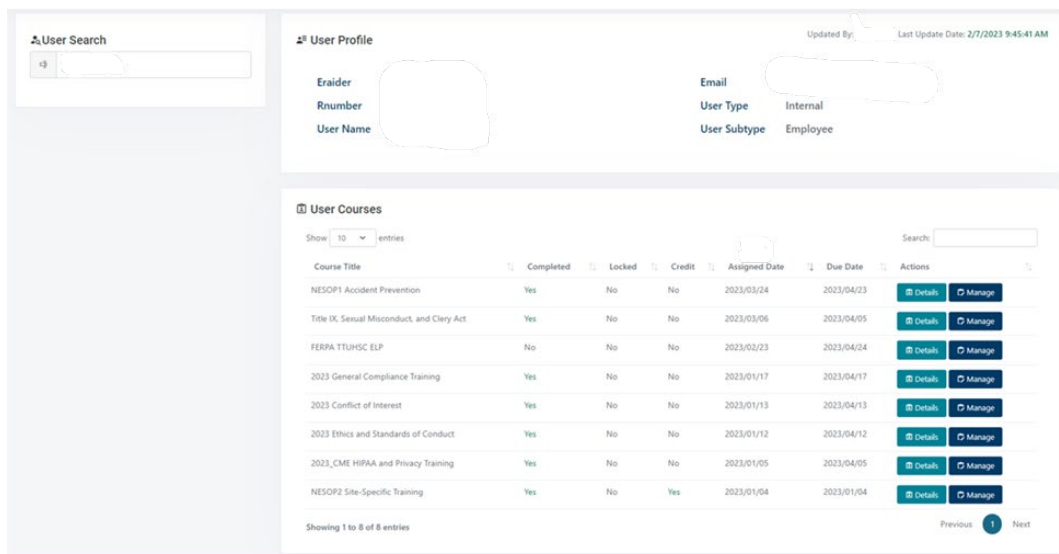
- 2) Next, you will find the **View User Report** page.



- 3) In the **User Search** section, you will be able to search for a specific user with their **eRaider, first name and/or last name**. A list of names will populate in a dropdown box.



- 4) Select the name of the individual. The following page will display the **User Profile** and the **User Courses**.



- 5) If you click on the **Details** button, it will direct you to the **View User Course Details** page.

User Courses

Show 10 entries

Search:

Course Title	Completed	Locked	Credit	Assigned Date	Due Date	Actions
NESOP1 Accident Prevention	Yes	No	No	2023/03/24	2023/04/23	Details Manage
Title IX, Sexual Misconduct, and Clery Act	Yes	No	No	2023/03/06	2023/04/05	Details Manage
FERPA TTUHSC ELP	No	No	No	2023/02/23	2023/04/24	Details Manage
2023 General Compliance Training	Yes	No	No	2023/01/17	2023/04/17	Details Manage
2023 Conflict of Interest	Yes	No	No	2023/01/13	2023/04/13	Details Manage
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12	2023/04/12	Details Manage
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05	2023/04/05	Details Manage
NESOP2 Site-Specific Training	Yes	No	Yes	2023/01/04	2023/01/04	Details Manage

Showing 1 to 8 of 8 entries

Previous 1 Next

a) In this page you can see a detailed description of the trainings and exams the user has completed.

Training

Current Status: **Completed**

Course
NESOP1 Accident Prevention

Year: 2023

Recurring: One time

Requires Test: Yes

Number of questions on Quiz: 10

Number of correct questions on Quiz: 8

My training details

Assigned Date: 3/24/2023

Due Date: 4/23/2023

Attempts: 1

Final Grade:

Completed Date: 4/3/2023

My Exams

Start Date	Completed	Finish Later	Completed Date	Passed	Correct Answers	Grade
2023/04/03	Yes	No	4/3/2023	Yes		

6) If you click on **Manage**, it will direct you to the **Manage User Course** page.

User Courses

Show 10 entries

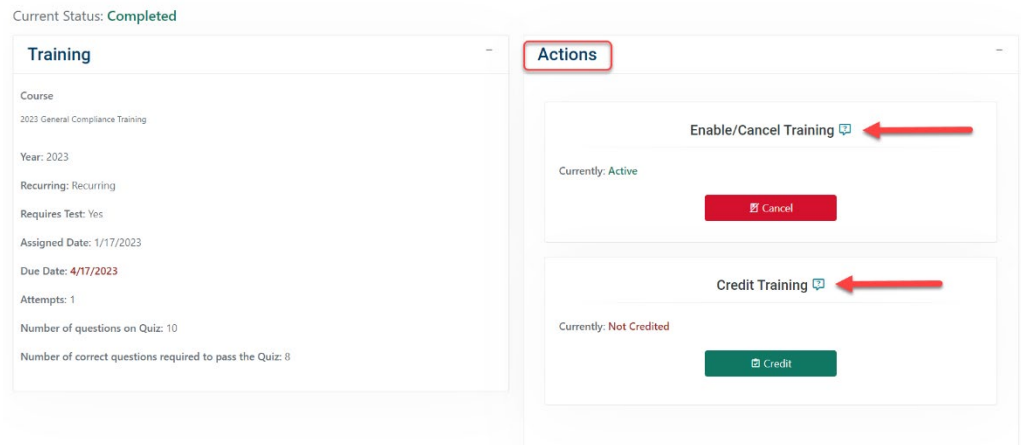
Search:

Course Title	Completed	Locked	Credit	Assigned Date	Due Date	Actions
NESOP1 Accident Prevention	Yes	No	No	2023/03/24	2023/04/23	Details Manage
Title IX, Sexual Misconduct, and Clery Act	Yes	No	No	2023/03/06	2023/04/05	Details Manage
FERPA TTUHSC ELP	No	No	No	2023/02/23	2023/04/24	Details Manage
2023 General Compliance Training	Yes	No	No	2023/01/17	2023/04/17	Details Manage
2023 Conflict of Interest	Yes	No	No	2023/01/13	2023/04/13	Details Manage
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12	2023/04/12	Details Manage
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05	2023/04/05	Details Manage
NESOP2 Site-Specific Training	Yes	No	Yes	2023/01/04	2023/01/04	Details Manage

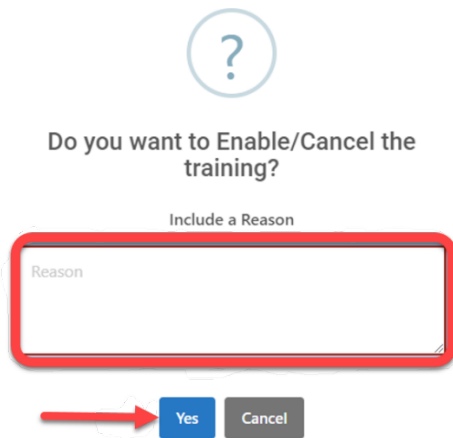
Showing 1 to 8 of 8 entries

Previous 1 Next

- a) Under the **Actions** section, you will have two options, first you can **Enable/Cancel Training** and second, you can give credit to an individual by clicking on the **Credit Training** button.



- 7) **Enable/Cancel Training:** If you click on this section a pop-up screen will appear. You will have to give the reason you want to cancel the training. After you are finish, click **Yes**.



- 8) **Credit Training:** If you click on this section a pop-up message will appear. You will have to include a reason you want to give credit for the training. After you are finish, click **Yes**.



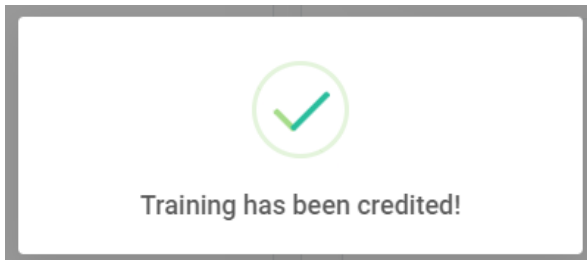
Do you want to Credit/Un-credit the training?

Include a Reason

User completed Conflict of Interest Training via MediaSpace on 1/19/23. LA

Note: Use the following template when including the reason; User completed (name of training) via MediaSpace or Canvas Catalog on (date). (Initials)”

a) Once you click on **Yes**, you will see the following pop-up notification.



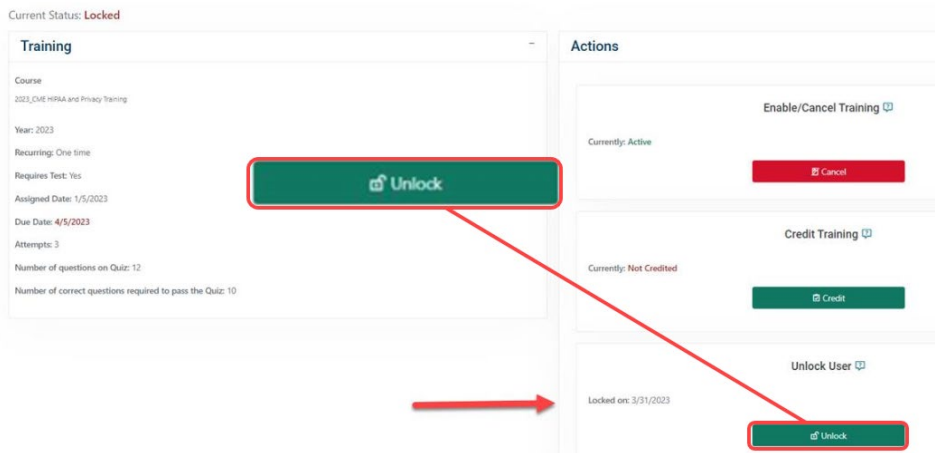
9) Next, under the **User Course** section you can verify if the credit was successfully applied to the training. Check for a **Yes** under the **Completed** section.

User Courses

Show entries

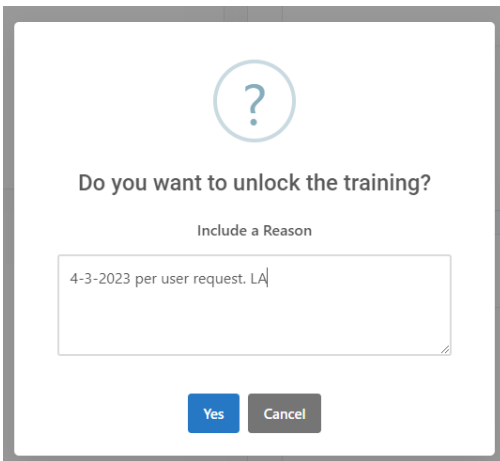
Course Title	Completed	Locked	Credit	Assigned Date
2023 General Compliance Training	Yes	No	No	2023/01/17
2023 Conflict of Interest	Yes	No	No	2023/01/13
2023 Ethics and Standards of Conduct	Yes	No	No	2023/01/12
2023_CME HIPAA and Privacy Training	Yes	No	No	2023/01/05

10) **Unlock User:** This option will display if the user has used all their attempts and has not successfully passed the test, or if the user ran out of time. Click **Unlock**.

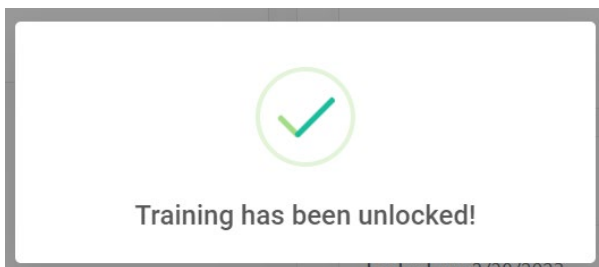


a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel**, if you made a mistake. Click **Yes** when you are ready.

- Make sure you enter a brief message before confirming **Yes**.



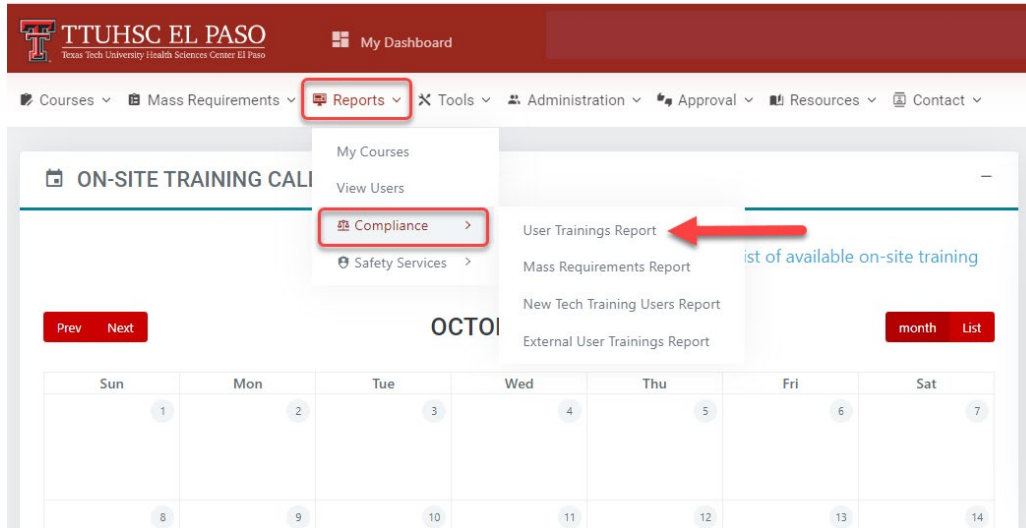
b) After you have clicked **Yes**, a pop-up notification will appear to confirm. You can go back to the **View User Report** to make sure the user was unlocked.



REPORTS – COMPLIANCE USER TRAININGS REPORT

The **User Training Report** will yield training completion information for all active users in Tech Training. The report includes the following fields: id, training, r number, eRaider, full name, email, termination date, start date, due date, course active, completed, credited, locked, attempts, grade, completed date, department, college, and position.

- 1) To pull a **User Training Report**, click on the **Reports** dropdown → **Compliance** → then click on **User Trainings Report**. You will see the following screen:



- 2) You will be redirected to the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

The screenshot shows the 'User Training Report' search criteria form. The form includes the following fields:

- Eraider** (a): A text input field with the value 'Eraider'.
- Date Range** (b): A date range input field with the value '01/01/2023 - 05/03/2023'.
- Training** (c): A dropdown menu with the value 'Select a course'.
- Training Status** (d): A radio button selection with options: All, Completed, Credited, Locked, Due.

A 'Search' button is located at the bottom right of the form.

- a) **eRaider** – Enter the **individual's eRaider**. If you need to pull a report for all users, leave this field blank.

🔍 Search Criteria

Eraider


Eraider

- b) **Date Range** – Click on this section to select the specific **date range** you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range

01/01/2023 - 05/03/2023

Jan 2023							Feb 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31	29	30	31	1	2	3	4
1	2	3	4	5	6	7	5	6	7	8	9	10	11
8	9	10	11	12	13	14	12	13	14	15	16	17	18
15	16	17	18	19	20	21	19	20	21	22	23	24	25
22	23	24	25	26	27	28	26	27	28	1	2	3	4
29	30	31	1	2	3	4	5	6	7	8	9	10	11

01/01/2023 -  **Apply**

- c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.

Training

Select a course

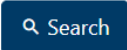
Select a course

- 2023 Conflict of Interest
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training**

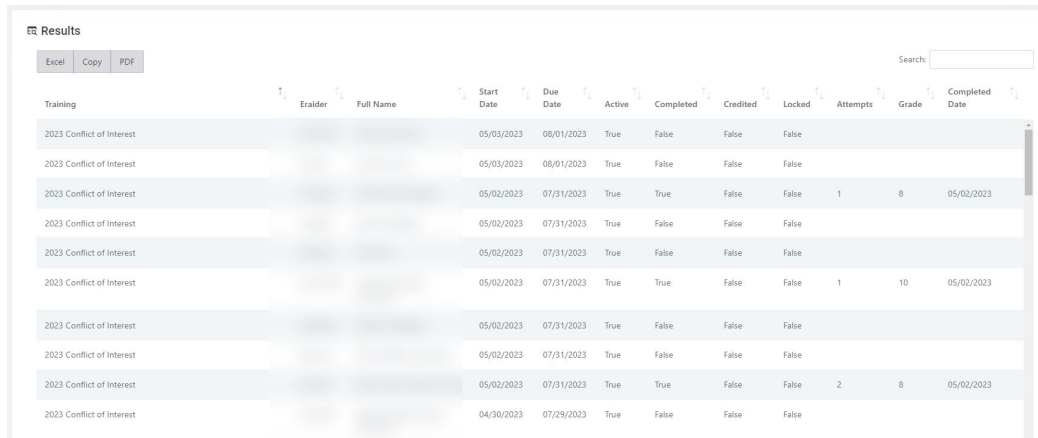
- d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, click on the radio button **All**.

Training Status

All Completed Credited Locked Due

3) Once you have completed all the fields, click on the  button.

4) When you click **Search**, the report will populate in the **Results** section at the bottom of the screen.

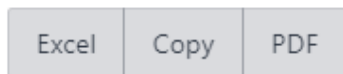


The screenshot shows a 'Results' section with a search bar and three buttons: 'Excel', 'Copy', and 'PDF'. Below these is a table with the following columns: Training, Eraider, Full Name, Start Date, Due Date, Active, Completed, Credited, Locked, Attempts, Grade, and Completed Date. The table contains 10 rows of data, all for '2023 Conflict of Interest' training. The 'Completed' column shows 'True' for all rows. The 'Attempts' column shows values of 1 and 2, and the 'Grade' column shows values of 8 and 10.

Training	Eraider	Full Name	Start Date	Due Date	Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			05/03/2023	06/01/2023	True	False	False	False			
2023 Conflict of Interest			05/03/2023	06/01/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	8	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	1	10	05/02/2023
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	False	False	False			
2023 Conflict of Interest			05/02/2023	07/31/2023	True	True	False	False	2	8	05/02/2023
2023 Conflict of Interest			04/30/2023	07/29/2023	True	False	False	False			

5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

Results

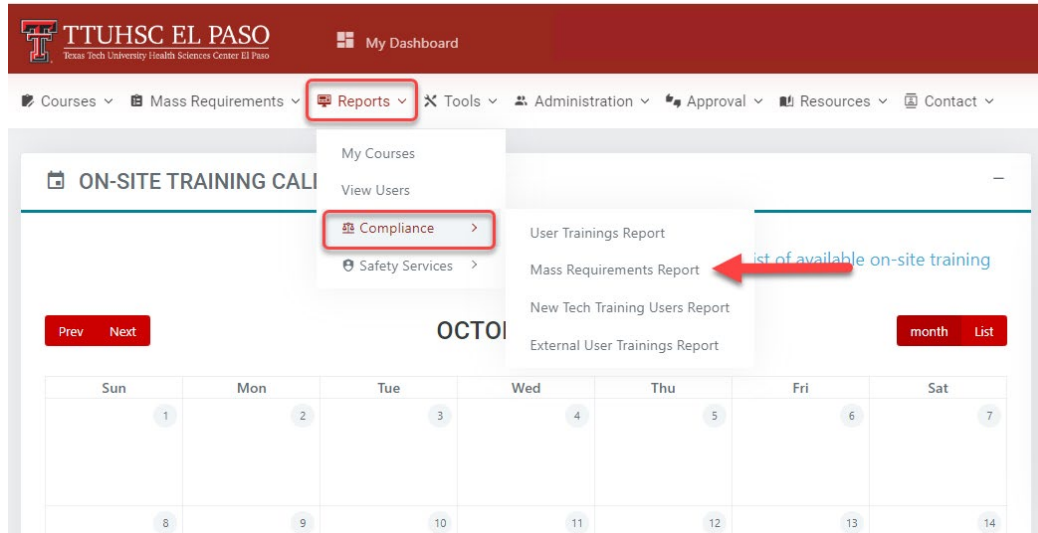


6) Once you have downloaded your report, save the **User Training Report** to your desired location.

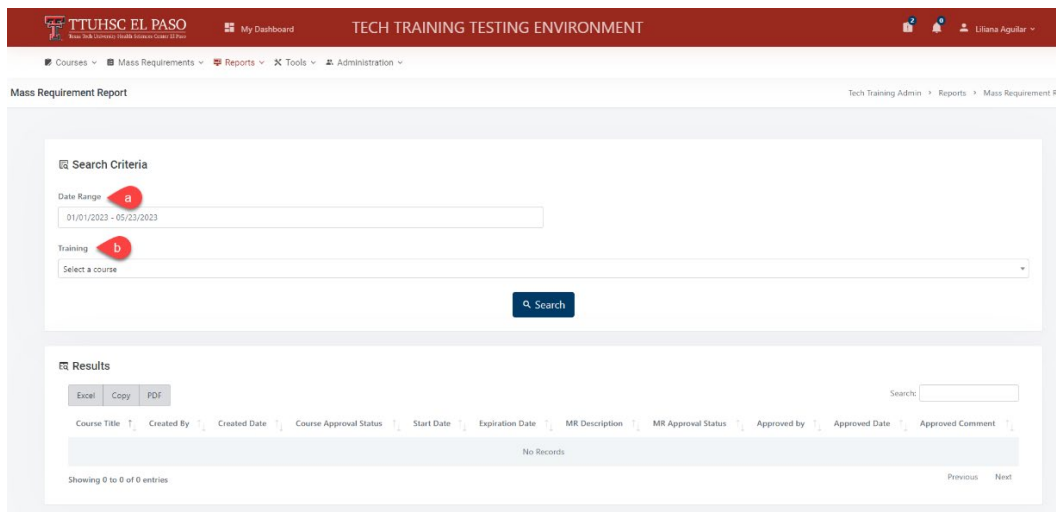
REPORTS – COMPLIANCE MASS REQUIREMENTS REPORT

The **Mass Requirements Report** will yield training course information for all course that have been uploaded into Tech Training. The report includes the following fields: course title, created by, created date, course approval status start date, expiration date, MR description, MR approval status, approved by, approved date and approved comment.

- 1) To pull a **Mass Requirements Report**, click on the **Reports** dropdown → **Compliance** → then click on **Mass Requirements Report**.



- 2) When you click on **Mass Requirement Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:



- a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range

01/01/2023 - 05/03/2023

01/01/2023 - **Apply**

- b) **Training** – you will need to select a course in the **Training** field dropdown. If you need to pull a report that shows all training courses, you may leave this field as **Select a course**.

Training

Select a course

Select a course

- 2023 Conflict of Interest
- 2023 Ethics and Standards of Conduct
- 2023 General Compliance Training
- 2023_CME HIPAA and Privacy Training
- 2023_Students HIPAA and Privacy Training**

- 3) Once you have completed all of the required fields, click on the  button.

- 4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

Results

Excel Copy PDF Search:

Course Title	Created By	Created Date	Course Approval Status	Start Date	Expiration Date	MR Description	MR Approval Status	Approved by	Approved Date	Approved Comment
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	01/24/2024	for research and IRIS purpose	Approved		01/24/2023	Committee has already approved the training. Assigned training for individual is approved. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes. <input type="checkbox"/>	Denied		03/30/2023	Testing. Not approved. Look at your course information. yqc
2023 Conflict of Interest		01/11/2023	Approved	03/31/2023	03/31/2024	This is for testing purposes. <input type="checkbox"/>	Approved		04/13/2023	Testing approval yqc
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/24/2023	02/24/2023	2023 Conflict of Interest	Approved		01/24/2023	This is approved. Committee has approved this course. AF
2023 Conflict of Interest		01/11/2023	Approved	01/13/2023	12/31/2023	COI training is required by policy 10.50, Regents' Rules chapter 3.1 and Texas Government Code 572	Approved		01/13/2023	Approve yearly course
2023 Conflict of Interest		01/11/2023	Approved	03/29/2023	03/29/2024	This is for testing purposes. <input type="checkbox"/>	Approved		03/29/2023	Force Mass Requirement

- 5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

Results

Excel

Copy

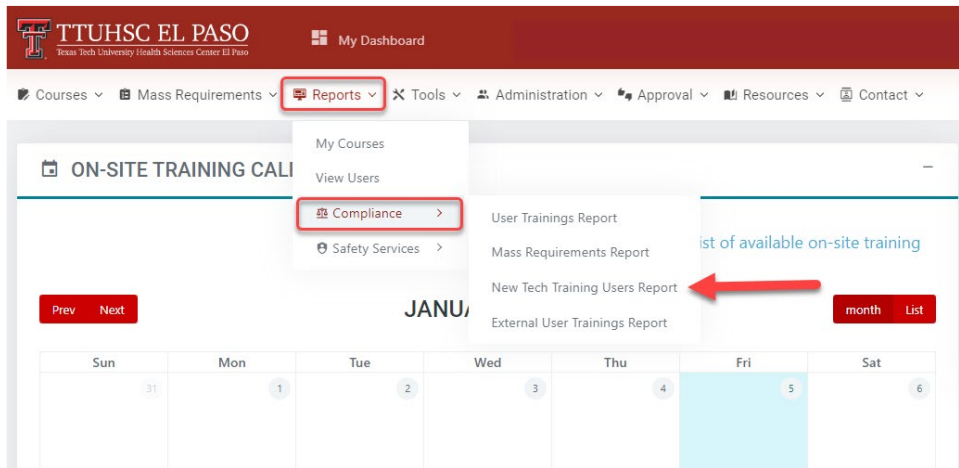
PDF

- 6) Once you have downloaded your report, make sure to save the **Mass Requirement Report** to your desired location.

REPORTS – COMPLIANCE NEW TECH TRAINING USERS REPORT

The **New Tech Training Users Report** is utilized to check how many persons have been hired by date range.

- 1) To pull a **New Tech Training Users Report**, click on the **Reports** dropdown → **Compliance** → then click on **New Tech Training Users Report**.



- 2) When you click on **New Tech Training Users Report** you will see the screen below. In the **Search Criteria** section, you will need to fill out the following fields:

The screenshot shows the 'Search Criteria' form. It has a 'Date Range' field with a red circle 'a' next to it, containing the text '04/23/2023 - 05/23/2023'. Below it is a 'User Type' section with a red circle 'b' next to it, featuring three radio buttons: 'All' (selected), 'Employees', and 'Students'. A 'Search' button is located at the bottom right.

- a) **Date Range** – Click on this field to select the specific date range you need. Once you have selected the correct dates, click on the **Apply** button.

Date Range


01/01/2023 - 05/03/2023

01/01/2023 - **Apply**

b) **User Type** – If you want to see a specific User Type, select either All, Employees or Students.

User Type

All Employees Students

3) Once you have completed all of the required fields, click on the  button.

4) When you click **Search**, you will see the report in the **Results** section at the bottom of the screen.

Results

Excel Copy PDF Search:

Erailer	UserName	Email	User Type	Department	Position	College	Imported Date
			Employee	Transmountain Practice Surgery ELP	Clinical Assistant		03/08/2023
			Student			ME	03/06/2023
			Employee	Clinical Operations OB/GYN	Patient Services Specialist		03/05/2023
			Employee	Orthopaedics ELP	Advance Practice Provider - NP		03/05/2023
			Employee	Human Resources ELP	HR Generalist ELP		03/03/2023
			Employee	Payment Services ELP	Analyst II		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Professor- General Dentistry		03/03/2023
			Employee	Woody L. Hunt SDM Admin ELP	Dental Dispensing Assistant		03/03/2023
			Employee	Faculty Development ELP	Analyst II		03/03/2023
			Employee	Clinical Operations NEURO	Medical Clinic Supervisor- ELP		03/03/2023
			Employee	Office of Global Health Affairs ELP	Coordinator		03/03/2023

5) To download the report as an **Excel** document or a **PDF**, click on the section underneath **Results**. You may also use the **Copy** function to copy the information in the report and paste in on a different document.

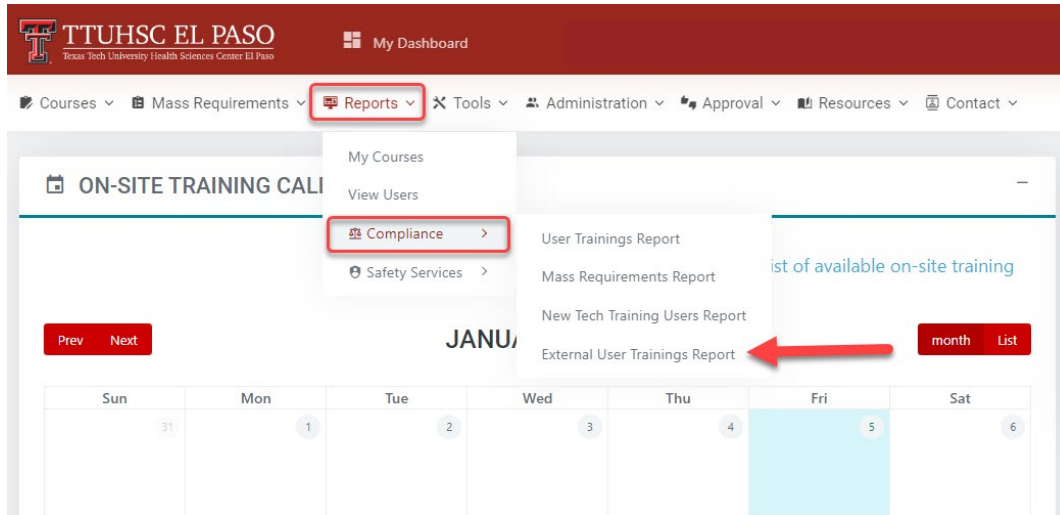
Results

Excel Copy PDF

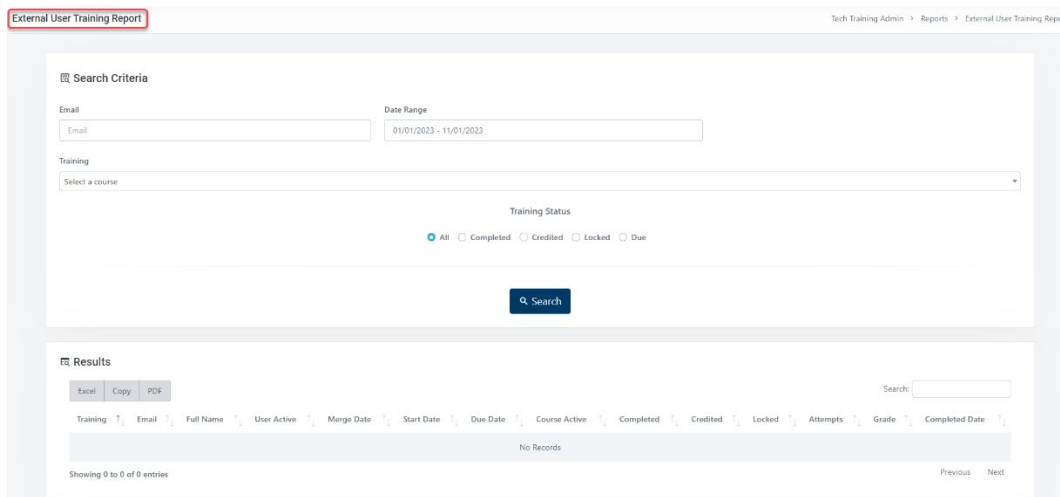
REPORTS – COMPLIANCE EXTERNAL USER TRAININGS REPORT

The External User Trainings Report will show the user the training information for the External Users.

- 1) To download the External Users Training Report, go to the **Reports** tab at the top of the page > **Compliance** and click on **External User Trainings Report**.

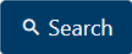


- 2) This will take you to the **External User Training Report** page.



- 3) In the **Search Criteria** section, fill out the following fields:
 - a) **Email** – Enter the **individual's personal email**. If you need to pull a report for all users, leave this field blank.
 - b) **Date Range** – Select the desired date range.

- c) **Training** – Click on the **Training** field to select a course. There will be a dropdown list of all of the courses that have been created. To see the report for all trainings, leave this field as **Select a course**.
- d) **Training Status** – in this section, select the type of status you need in the report. If you would like to see a report for all trainings, keep the radio button **All**.

4) After you have filled out all the fields, click on the  button.

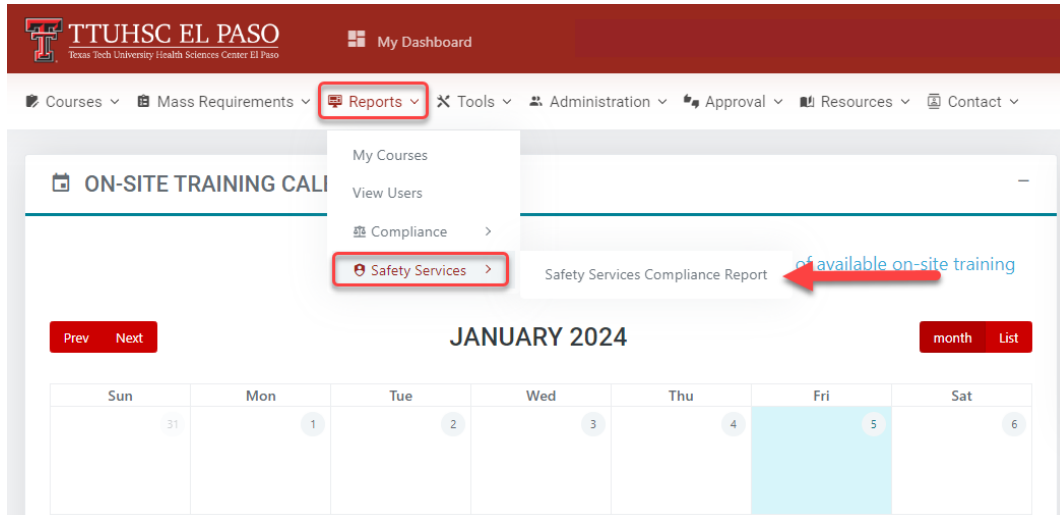
5) The **Results** section will populate with all the External User Trainings information. Click on the **Excel**, **PDF** or **Copy** option to download or save the report.

Training	Email	Full Name	User Active	Merge Date	Start Date	Due Date	Course Active	Completed	Credited	Locked	Attempts	Grade	Completed Date
2023 Conflict of Interest			Yes		09/22/2023	11/21/2023	Yes	Yes	No	No	1	9	09/22/2023
2023 Conflict of Interest			Yes		04/14/2023	06/13/2023	Yes	No	No	Yes	3		
2023 General Compliance Training			Yes		09/22/2023	11/21/2023	Yes	No	No	No			
2023_Students HIPAA and Privacy Training			Yes		09/22/2023	11/21/2023	Yes	No	No	No			
3			Yes		09/19/2023	11/18/2023	Yes	No	No	No			
3			Yes		09/15/2023	11/14/2023	Yes	No	No	No			
3			Yes		04/14/2023	06/13/2023	Yes	Yes	No	No	0	10	09/15/2023
Basic Informed Consent Training			Yes		09/19/2023	11/18/2023	Yes	No	No	No			

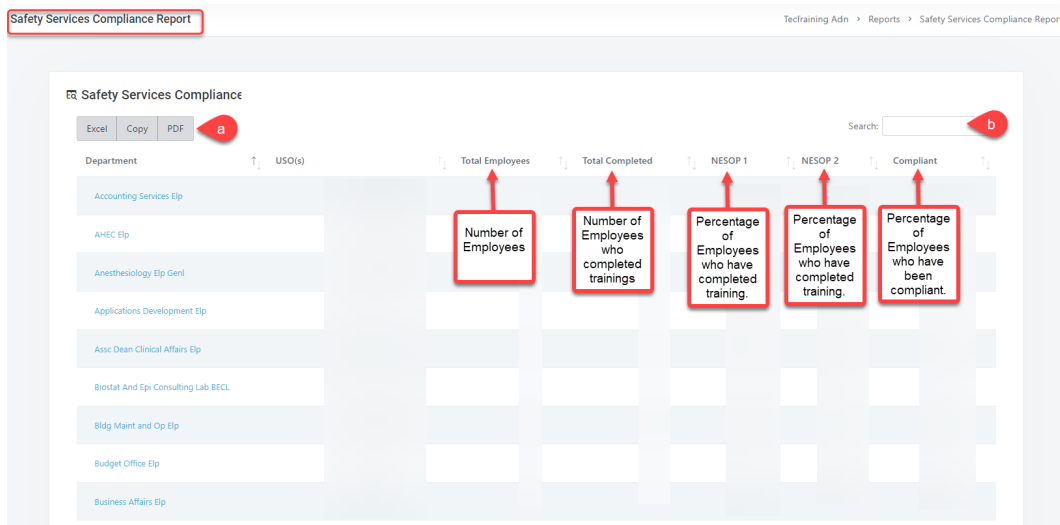
REPORTS – SAFETY SERVICES COMPLIANCE REPORT

For more information on Safety Services content, please contact the Safety Services department at safetyserviceselp@ttuhsc.edu or call 915-215-4823.

- 1) Go to the **Reports** dropdown, click **Safety Services** and go to **Safety Services Compliance Report**.



- 2) Next, you will see the **Safety Services Compliance Report** screen.

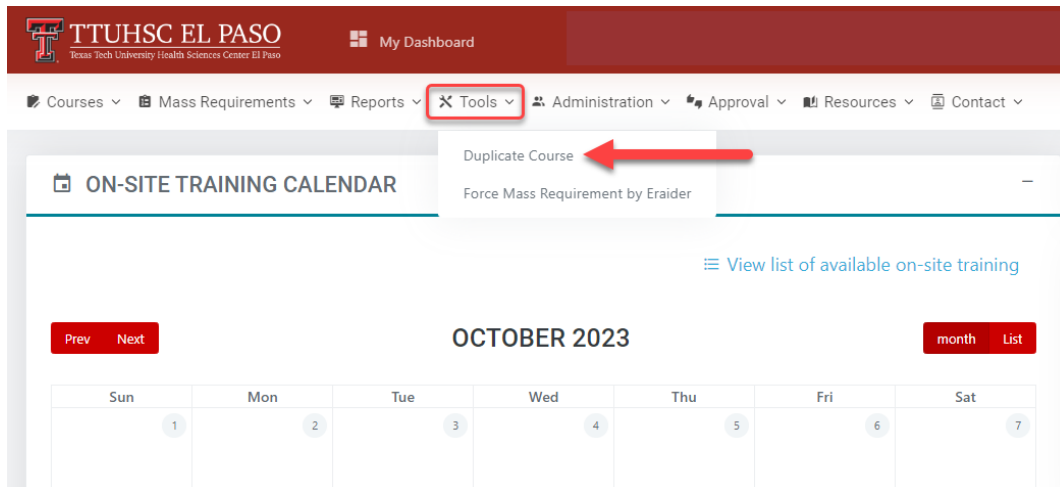


- a) In this section, you will have the option to export the document into **Excel** or **PDF** or **Copy** the document.
- b) You have the **Search** bar where you can look up a department by its name.

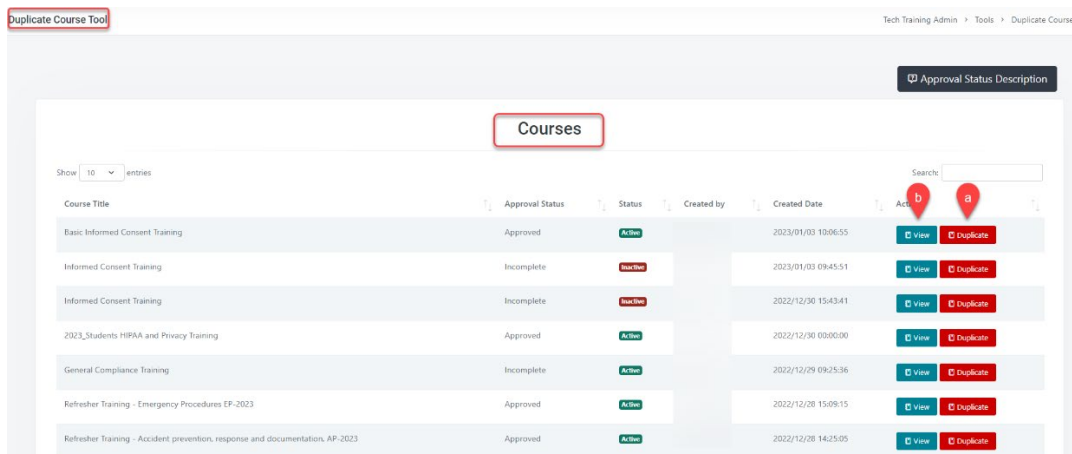
TOOLS – DUPLICATE COURSE

The Duplicate Course feature assists in creating a course by replicating a previously approved course. The user will not need to recreate it; however, the course will require committee approval once submitted.

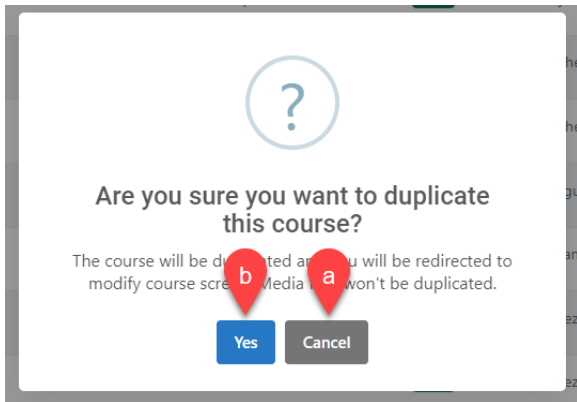
- 1) Go to the **Tools** dropdown at the top of the page and click on **Duplicate Course**.



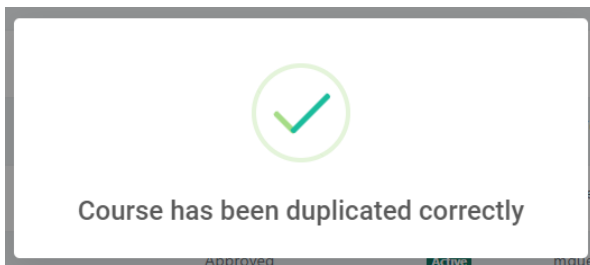
- 2) This will take you to the **Duplicate Course Tool** screen. A list of **Courses** will appear.
 - a) Look for the one training you want to duplicate and click on **Duplicate**.
 - b) You can click on **View** to see the details of the course.



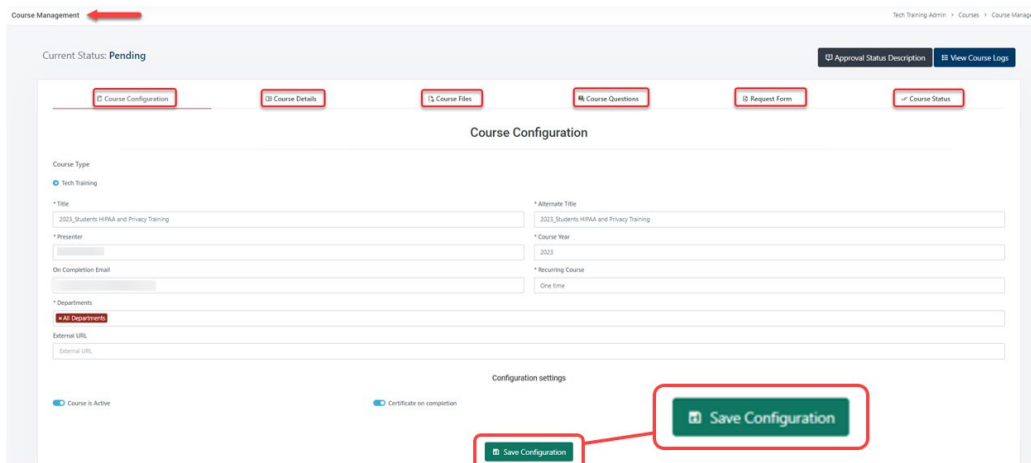
- 3) Next, the following pop-up box will appear:




- a) To go back to the **Duplicate Course Tool** screen click **Cancel**.
- b) If you want to proceed click **Yes**. You will see the following pop-up notification:

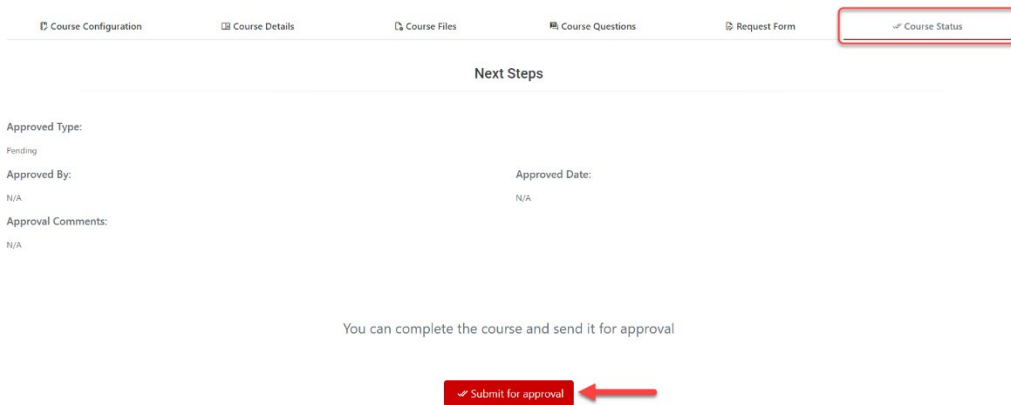


- 4) Next, you will see the **Course Management** screen. Follow the steps under the **Create a Course section Add**.
- 5) Start making the changes for the duplicate course. You can click on the **tabs** to continue.

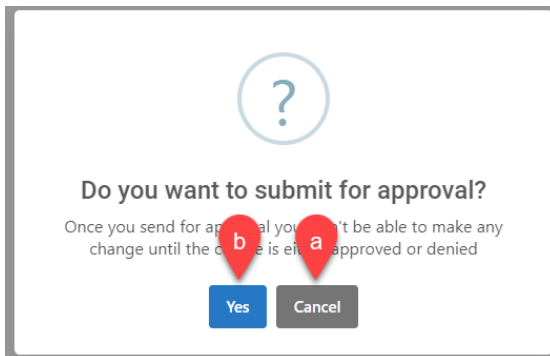


Note: Do not forget to click on the  Save Configuration button after completing each section.

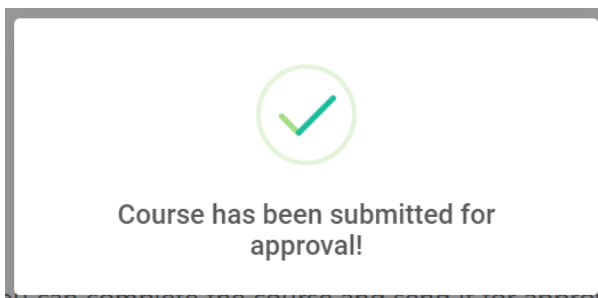
- 6) Once you are at the **Course Status** tab and you are finished making changes, click on the **Submit for approval** button.



- 7) A pop-up box will appear.
- a) Click **Cancel** if you want to stay on **Course Management** screen.
 - b) Click **Yes** if you are ready to submit for approval.



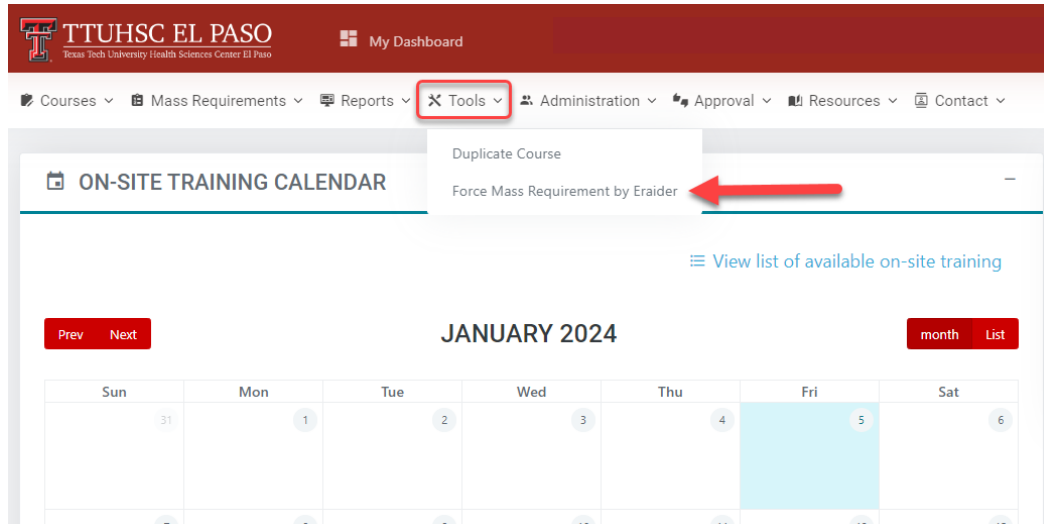
- 8) A pop-up box will appear confirming that the course was submitted for approval.



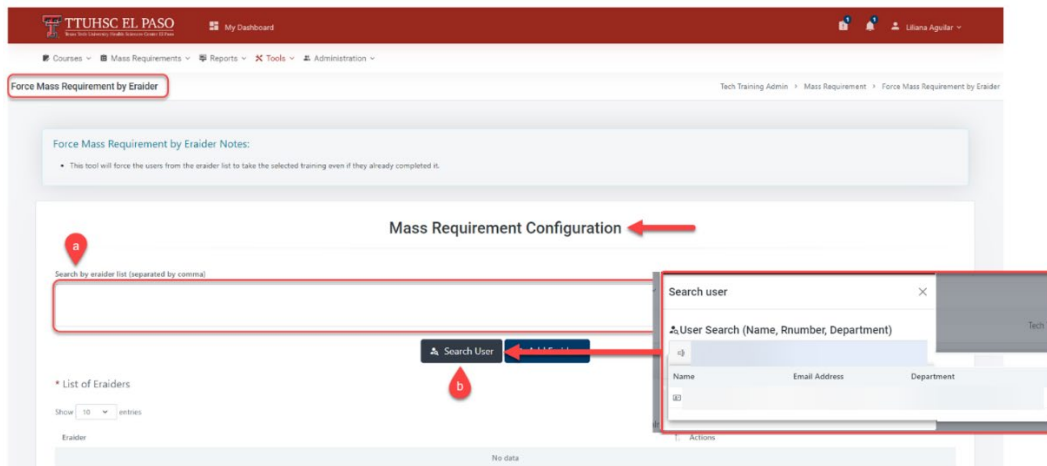
TOOLS – FORCE MASS REQUIREMENT BY ERAIDER


- 1) Go to the **Tools dropdown** and click **Force Mass Requirement by eRaider**.

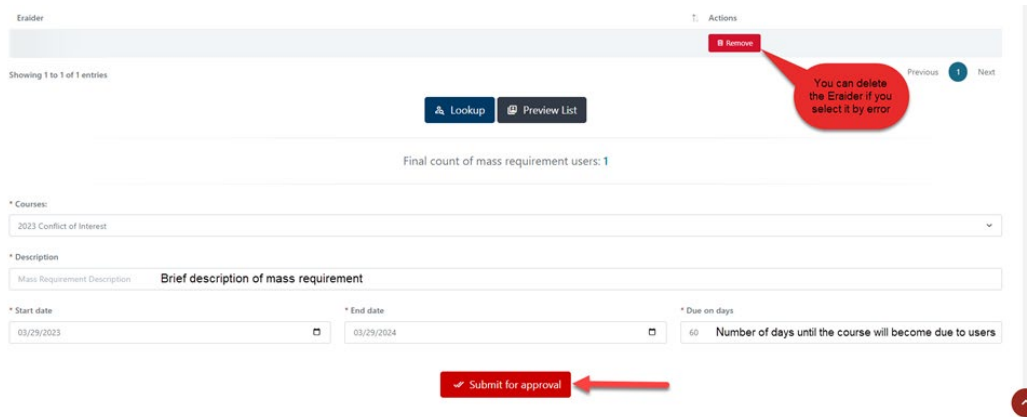
Note: This feature will assign/reassign the training course to the users selected even if the user has already completed the training.



- 2) This will take you to the **Force Mass Requirement by eRaider** screen.
- 3) Under the **Mass Requirement Configuration** section, in the **Search by eRaider list** box, type the individual(s) eRaider(s). Then press the **Add Eraiders** button.
 - a) If you do not know the eRaider, click on **Search User** button and type the individual(s) name(s). This field will populate a list of names. Click on the desired name(s).



- 4) Next, click on the  button. This will indicate the number of individuals that will have the training assigned. It also activates the request.
- 5) Scroll down and fill out the required fields. *Note: Required fields are identified by an asterisk (*).* When you finish, click on **Submit for approval**.

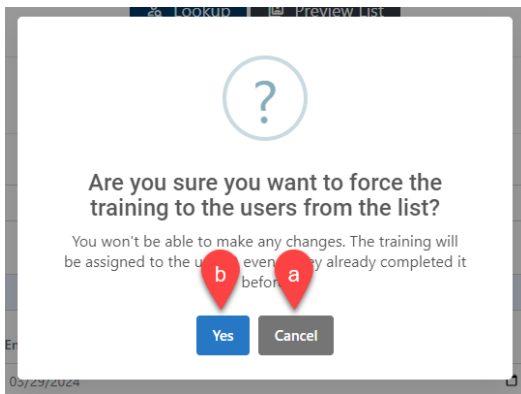


The screenshot shows the 'Eraser' interface with a form for configuring a mass requirement. The form includes the following fields:

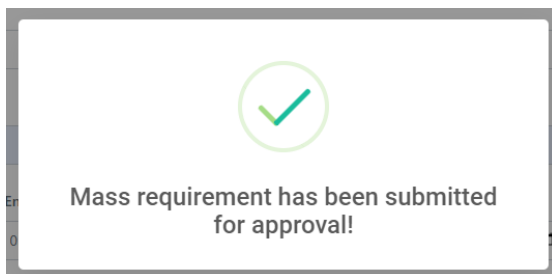
- Courses:** 2023 Conflict of Interest
- Description:** Mass Requirement Description (Brief description of mass requirement)
- Start date:** 03/29/2023
- End date:** 03/29/2024
- Due on days:** 60 (Number of days until the course will become due to users)

A red arrow points to the **Submit for approval** button at the bottom of the form. A red callout bubble indicates that the Eraser can be deleted if selected by error.

- 6) Next, a pop-up window will appear.
 - a) Click **Cancel** to stay on **Mass Requirement Configuration** section.
 - b) Click **Yes** to proceed.



- c) When you click **Yes**, a pop-up notification will appear to confirm your submission.

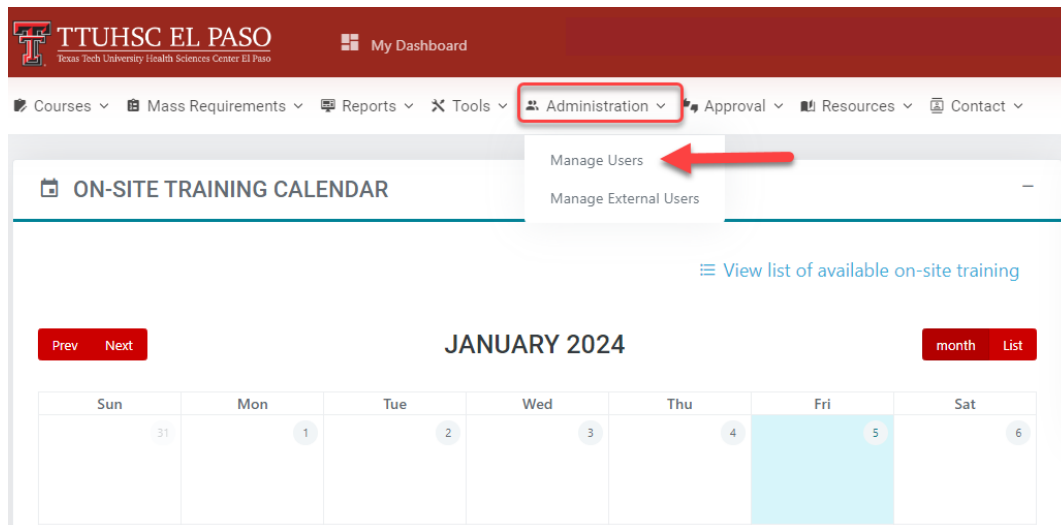


ADMINISTRATION – MANAGE USERS

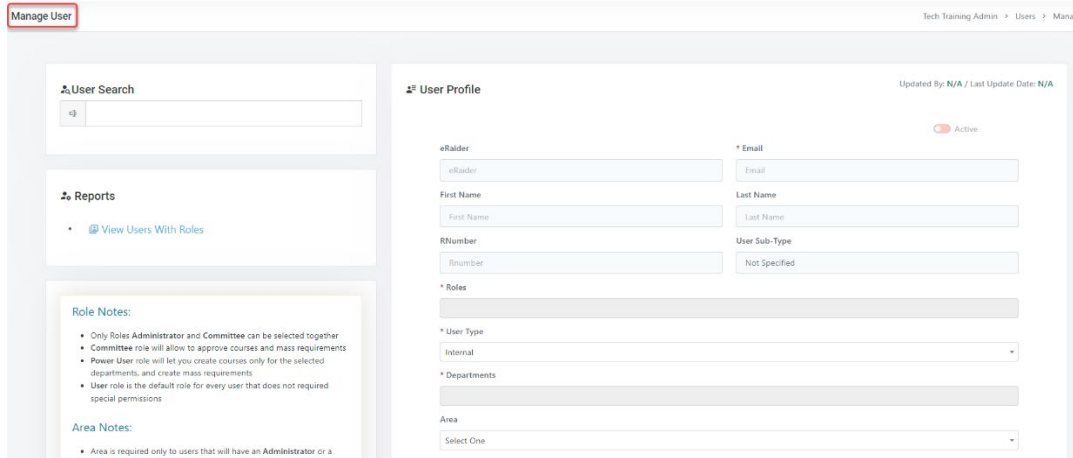
- 1) In the Tech Training application, some users will be assigned a different **User Type** depending on their department, role, and job duties:
 - **Administrator role** – user will have full access to all of the functions. The administrator will be able to modify the role for any user.
 - **Committee role** – user will be able to review/approve new training courses and mass requirements.
 - Only the **Administrator** and **Committee roles** can be selected together.
 - **Power User role** – will only let user create courses only for the selected departments.
 - **Wiki Admin role** – will allow the user to create or modify wiki content for any website in Texas Tech.
 - **User role** – is the default role for every user that does not require special permissions.

Note: Area is required only to users that will have an Administrator or a Power User Role. Depending on the area selected some extra features will appear so be careful when assigning an area.

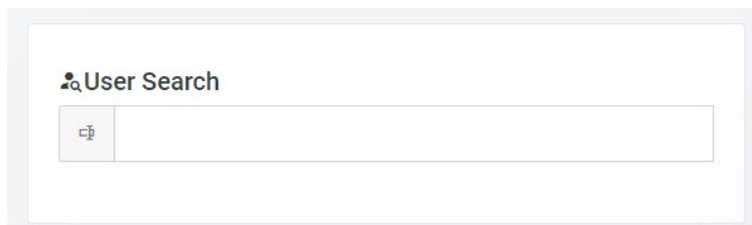
- 2) To manage/edit a user's role, go to the **Administration dropdown** and click **Manage Users**.



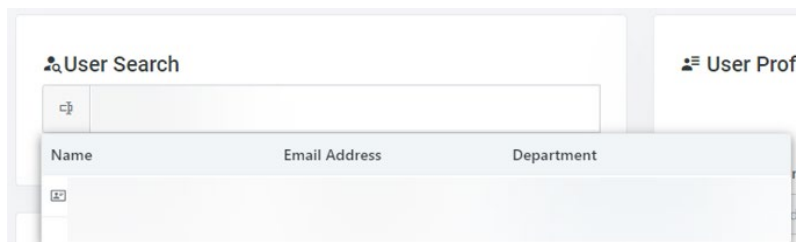
- 3) This will take you to the **Manage User** screen.



4) To search for a user, click on the **User Search** bar on the left side of the screen.



a) Next, you will need to type in the name or eRaider of the individual you are searching for. A dropdown menu will populate where you can select the individual by clicking on their name.



5) When you click on the individual's name, their information and role will be populated on the right side in the **User Profile** section.

- 6) Click on the **Roles** section. There will be a dropdown menu of all of the available roles. To add a role for the user, click on role needed. The roles selected will appear in this section (in dark red).

- 7) Click on **Departments** section to change the department. There will be a dropdown menu of all available departments. Click on department needed.

- 8) Click on **Area** to assign the user a specific area. A dropdown box will appear with the available options.

Area

Select One

Select One

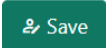
Compliance

Finance

Human Resources

IT

Other

9) Once you have selected the new role(s), department and area that apply, click on the  button at the bottom of the **User Profile** section.

10) Next, scroll down the page in the **User Logs** section. You will see a history of the user's roles, training that has been assigned, as well as any changes that have been made.

User Logs

Show: 10 entries

Search:

Created By	Created Date	Log Type	Log
esosamar	2023/05/19 14:06:11	ManageUser	Role changed to: Administrator
esosamar	2023/04/20 09:44:28	ManageUser	Area Type Changed from: N/A to: Compliance
esosamar	2023/04/20 09:44:28	ManageUser	Role changed to: Administrator
esosamar	2023/04/20 09:44:09	ManageUser	Area Type Changed from: N/A to: Compliance
esosamar	2023/04/20 09:44:09	ManageUser	Role changed to: User
liliaagu	2023/03/14 14:35:54	UserCourseExam	Training has been completed successfully
liliaagu	2023/03/14 14:28:25	UserCourseExam	Number of attempts: 1
liliaagu	2023/03/14 14:02:46	UserCourseExam	File Title IX El Paso Training.pdf downloaded by user
SYSTEM	2023/03/06 14:20:52	UserLog	New course assignment: Title IX, Sexual Misconduct, and Clery Act
SYSTEM	2023/02/23 11:05:43	UserLog	New course assignment: FERPA TTUHSC ELP

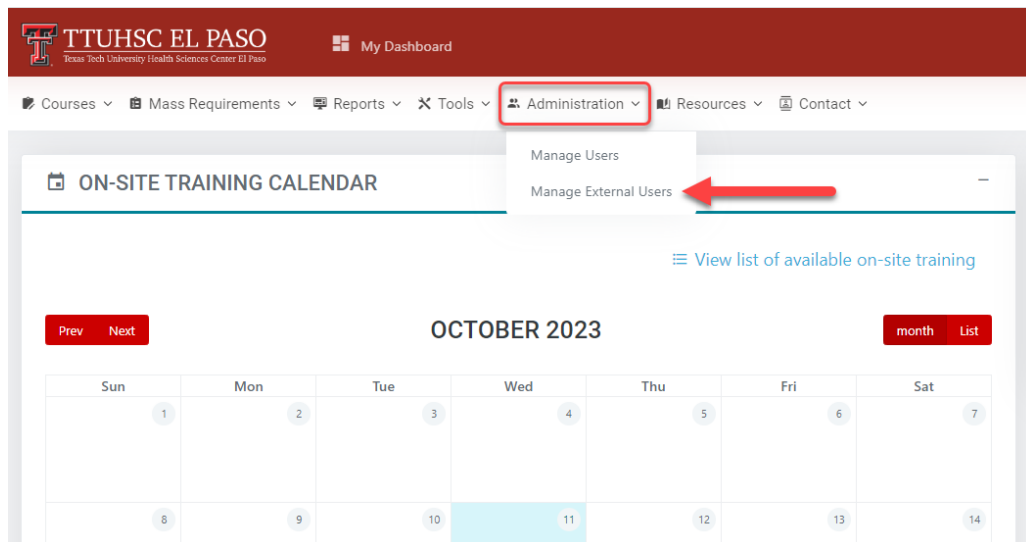
Showing 1 to 10 of 30 entries

ADMINISTRATION – MANAGE EXTERNAL USERS

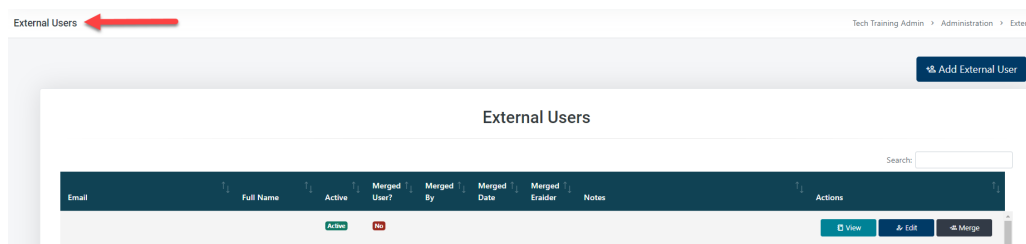
This function will allow you to add an external user (such as staffing agency employees, volunteers, or future faculty that are in the onboarding process), assign courses to the user, and merge the user with an existing TTUHSC EP eRaider account.

Note: The person creating the profile will need to be provided with detailed user information (user full name, personal email, department and trainings that need to be assigned).

- 1) Go to the **Administration dropdown** and click **Manage External Users**.



- 2) Next, you will see the External Users screen.



- 3) In the **External Users** page, you will have the following options: **Add External User**, **View**, **Edit**, or **Merge**.

- 4) To add an external user, click on the **Add External User** button.

- 5) This will take you to the **Add External User** page. Fill out the required information fields in the section at the top of the screen.

Note: Required fields are identified by an asterisk ().*

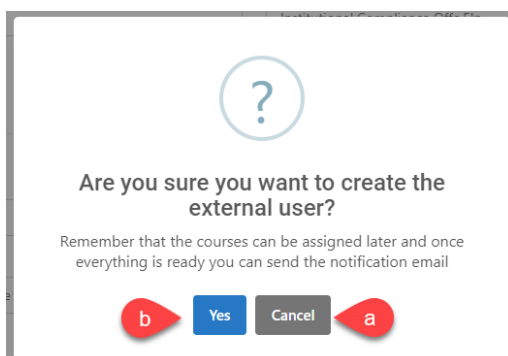
The screenshot shows a web form titled "Add External User". At the top right, there is a blue toggle switch labeled "Active" with a red callout letter 'a'. Below this are several input fields: "Email" (with callout 'b'), "First Name" (with callout 'c'), "Last Name" (with callout 'd'), and "Department" (a dropdown menu with callout 'e'). Below these is a "Notes" field (with callout 'f') containing the placeholder text "Any additional notes to identify the external user".

Below the form is a section titled "Course Assignments" with a refresh icon. It contains three input fields: "Start Date" (07/12/2024), "Due on days" (60), and "Expiration Date" (09/10/2024). Below these is a "Course" dropdown menu showing "NESOP1 Emergency Procedures" and a "+ Add Course" button. At the bottom of this section is a "Save" button.

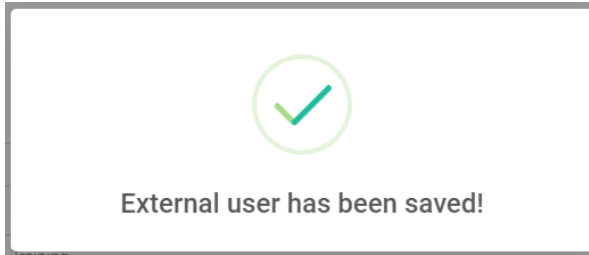
At the very bottom of the form, there is a table header with columns: "Course", "Start Date", "Expiration Date", and "Due on days". The table body is empty, showing "No data found".

- a) **Active** – This will make the user active/inactive. Make sure the toggle button is blue.
 - b) **Email** – Enter the personal email that the user provided or an email the user has access to.
 - c) **First Name** – Enter the user’s full first name.
 - d) **Last Name** – Enter the user’s full last name.
 - e) **Department** – Scroll down in the dropdown field to select the correct department.
 - f) **Notes** – Enter the staffing agency or any relevant notes that pertain to this user.
- 6) Next, you will go to the **Course Assignments** section at the bottom of the screen. Fill out the required fields.

- a) **Start Date** – Enter the date the course is being assigned.
 - b) **Due on days** – Enter the number of days the course will be available to the user.
 - c) **Expiration Date** – This date will self-populate based on the Due on days.
 - d) **Course** – Click on the dropdown menu and select the course you need to assign.
- 7) Once you have completed the required fields, click on the **+ Add Course** button.
 - 8) If multiple courses need to be assigned, follow steps #6 and #7.
 - 9) When you have finished adding the external user’s information and assigning the course(s), click **Save**.
 - 10) Once you click on the **Save** button, you will see the following pop-up notification:
 - a) Click **Cancel** to stay on **Add External User** screen.
 - b) Click **Yes** to proceed.



11) Once you click **Yes** you will see a pop-up notification confirming the user profile has been created and trainings assigned.



12) If you click on the **View** button in the **External Users** screen, this will take you to the **View External User** screen. This screen will display the user's information as well as all courses that have been assigned to that user.

View External User

External User Details

Created By: [redacted] / Created Date: 4/14/2023
Last Update By: SelfRegistration / Last Update Date: 5/24/2023

Name: [redacted] Active: True

Email: [redacted]

Departments

Information Services Eip

Assigned Courses

Search: [input]

Course	Start Date	Expiration Date	Due on days	Completed	Locked	Canceled	Actions
Preparing for Internal Research Audits	4/14/2023	6/13/2023	60	No	No	No	Cancel
Box Training	4/14/2023	6/13/2023	60	Yes	No	No	Certificate

Showing 1 to 6 of 6 entries

Log

Search: [input]

Log	Changed By	Changed Date
Password reset email sent	SYSTEM	5/24/2023
Password reset email sent	SYSTEM	5/24/2023

Showing 1 to 4 of 4 entries

13) In the **Assigned Courses** section, you will have the option to **Cancel** a training assignment, **unlock** a training, or print a **Certificate of Completion** for the user.

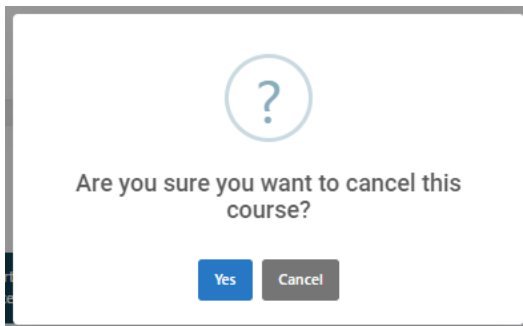
Assigned Courses

Search:

Course	Start Date	Expiration Date	Due on days	Completed	Locked	Canceled	Actions
Preparing for Internal Research Audits	4/14/2023	6/13/2023	60	No	No	No	<input type="button" value="Cancel"/>
Box Training	4/14/2023	6/13/2023	60	Yes	No	No	<input type="button" value="Certificate"/>
Laboratory Safety Essentials	4/14/2023	6/13/2023	60	No	Yes	No	<input type="button" value="Unlock"/>

14) The **Cancel** option will allow you to cancel a training for the user. Please note that the training can only be canceled if the user has not completed the course.

a) If you click on the **Cancel** button in the **Actions** column you will see the following pop-up notification:

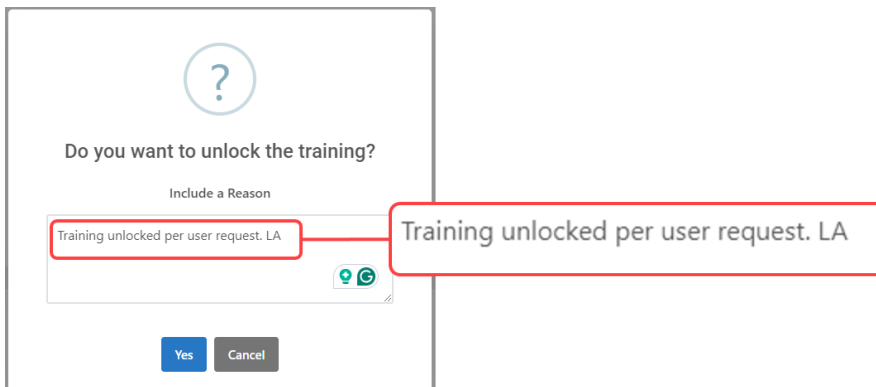


b) Click **Yes** to cancel the course, or click **Cancel** to go back to the **View External User** screen.

15) The **Unlock** option will allow you to unlock a training for the user. Please note that the training can only be unlocked if the user has used all the available attempts.

a) Next, a pop-up box will appear. Type the reason you are unlocking the user. Click **Cancel** to go back to the **View External User** screen. Click **Yes** to proceed.

- Make sure you enter a brief note before confirming **Yes**.



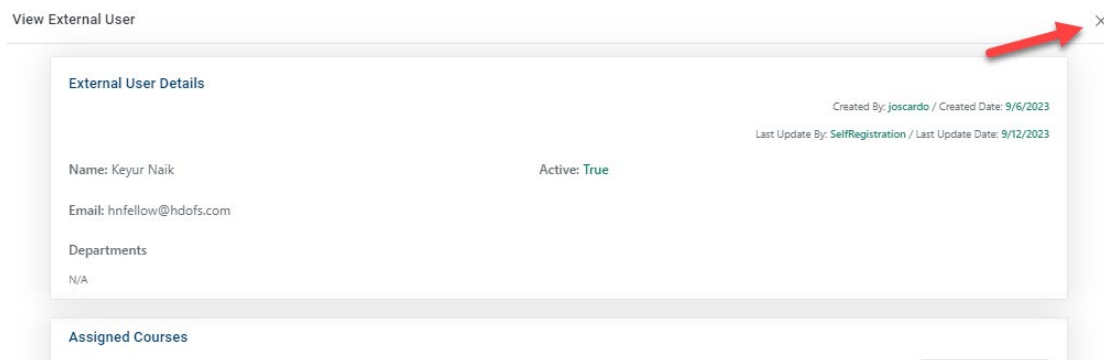
16) The **Certificate** option will allow you to print a Certificate of Completion for the user.

a) When you click on this button you will see the following screen:




b) Click on the **Print** button at the top right side of the page to print the certificate or save it as a PDF.

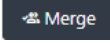
17) To go back to the **External Users** screen, click on the **X** at the top right side of the page.

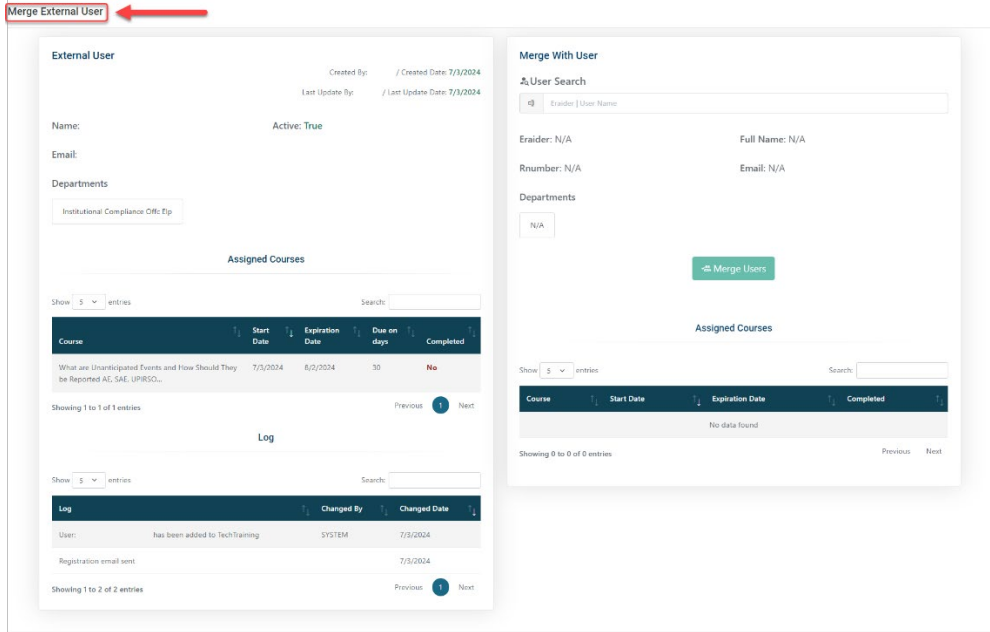


18) If you click on the **Edit** button in the **External Users** screen, this will take you to the **Modify External User** screen. In this screen, you can inactivate the user, update their name or department, or add any additional notes.

19) Once you have made all necessary edits, click on the  button.

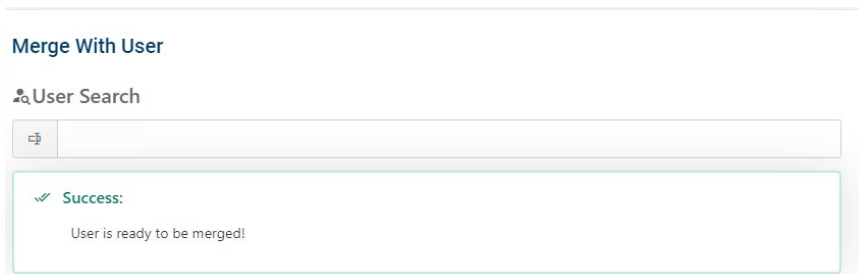
20) To go back to the **External Users** screen, click on the **X** at the top right side of the page.

21) The person who created the external user's profile will need to monitor the external user(s) periodically to determine when to merge the external account with the new TTUHSC EP eRaider account. If you click on the  button you will see the **Merge External User** screen.

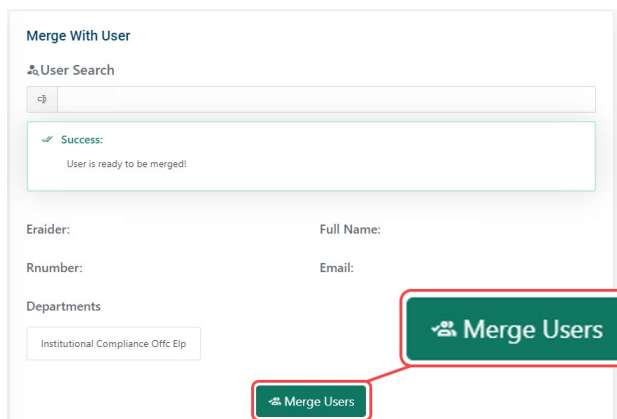


22) Click on the **User Search** box and type the user's Name/eRaider you want to merge. This will populate the user's information.

a) Once you have selected the desired user you will see the message below:



b) Click on the **Merge Users** button to merge the external user with the existing TTUHSC EP eRaider account.

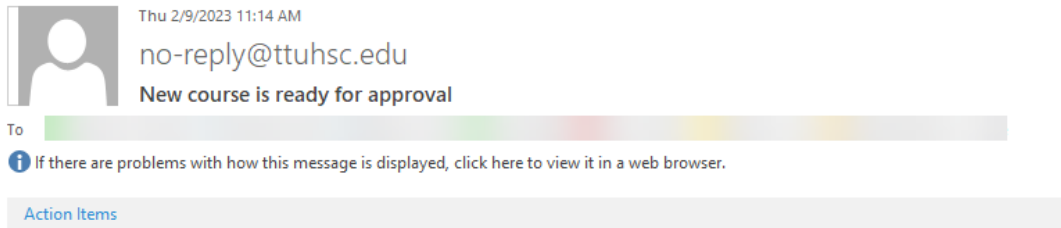


APPROVAL – APPROVE COURSE

As a Committee Member, you will be responsible for approving the training courses that are created in Tech Training.

*Note: The training courses only require approval from **one** Committee member. If a training course has already been approved by a Committee member, no further action is required.*

- 1) When a user submits a new training course, you will receive an email notification prompting you to review and approve the course. To access the course, click on the [Tech Training Website](#) link at the bottom of the email.



Dear Committee:

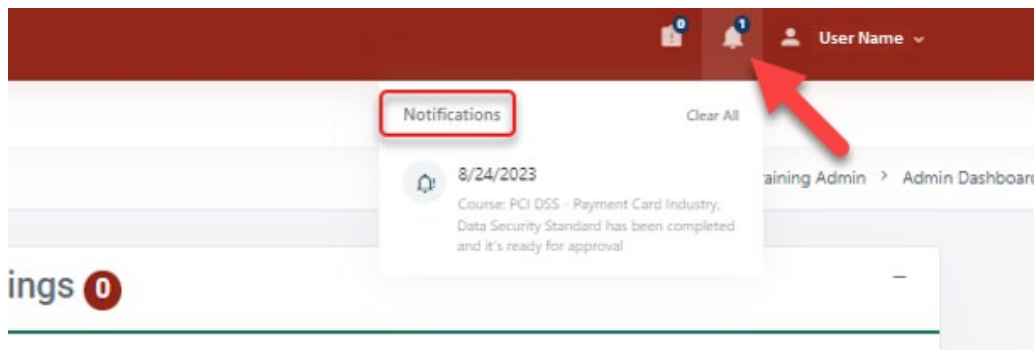
The Course **Research Misconduct** has been submitted for your approval

Created By: [REDACTED]

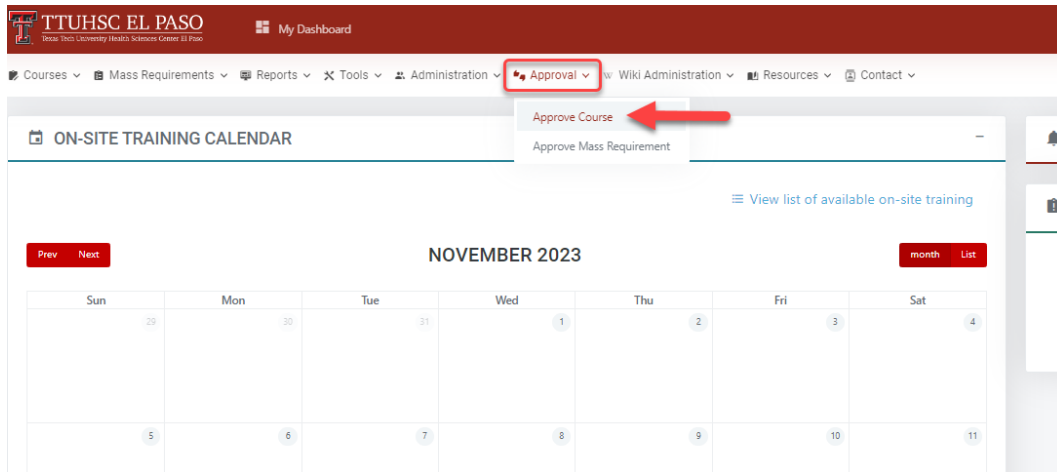
Created Date: 2/9/2023

Please log in to the [Tech Training Website](#) for mor details. 

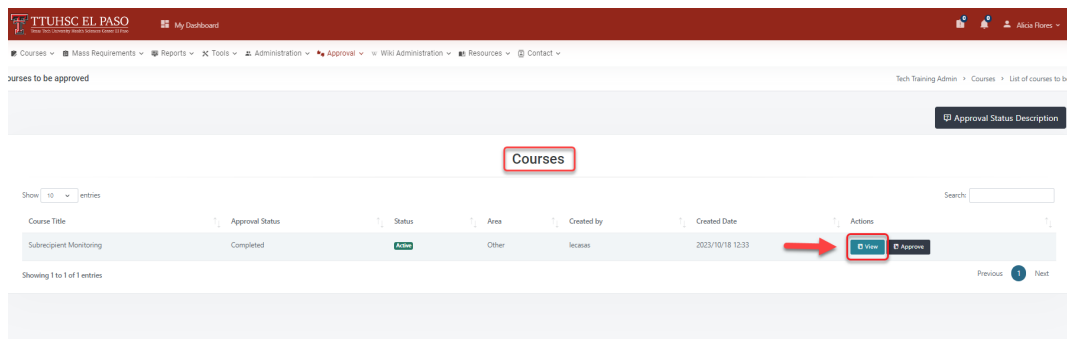
- 2) When you are logged into Tech Training, you will also receive a notification at the top right corner of the screen. To view your notifications, click on the bell icon.



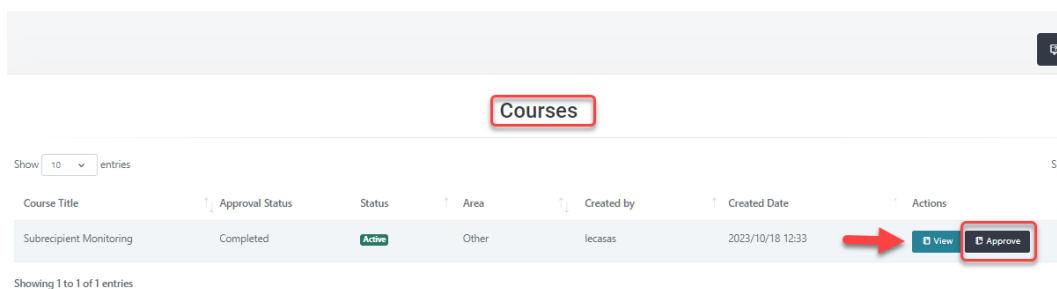
- 3) To view the course, go to **Approval → Approve Course** at the top of the page.



- 4) When you click on **Approve Course**, you will be taken to the **Courses** screen. To review the course that has been submitted click on the **View** icon in the **Actions** column.

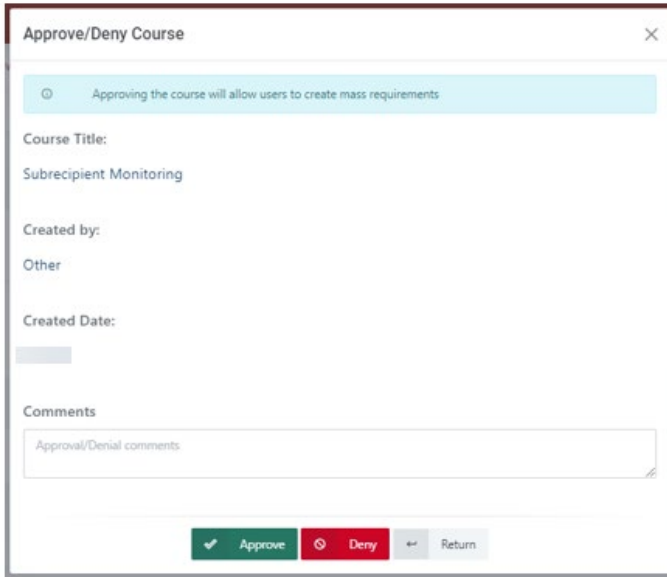


- 5) The **View** function will show you the **Course Configuration, Course Details, Course Files, Course Questions** and the **Course Request Form**. Review the information submitted.
- 6) Once you are ready to approve/deny the course, click on the “**X**” at the top right side of the screen to go back to the **Courses** page.
- 7) In the **Courses** page, click on the **Approve** button in the **Actions** column.

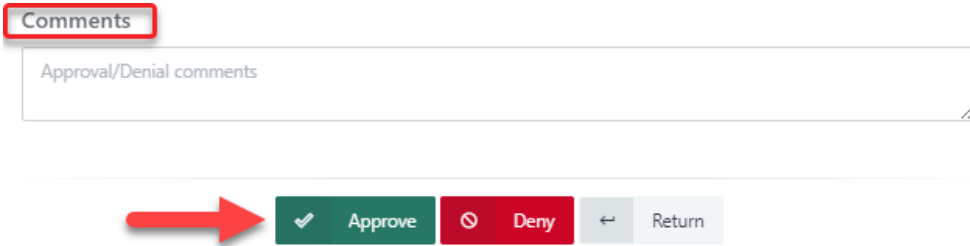


- 8) Next, you will see the following pop-up screen:

a) Click on the **Return** button if you are not ready to approve/deny the course.



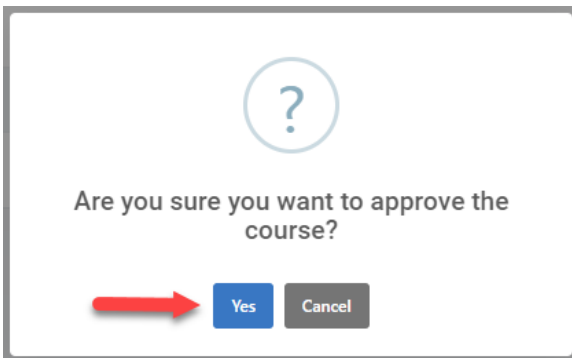
9) Before approving/denying a course, enter a comment in the **Comments** section then click on either **Approve/Deny**.



a) Example for course approval comment: *"This course is approved 01/20/2023. AF"*

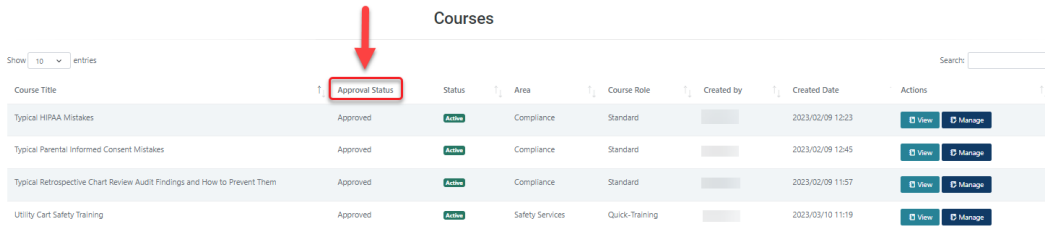
b) If you are denying the course, indicate the **specific** reason. This will assist the individual that created the course in making any necessary changes/edits.

10) Once you click on **Approve** you will see the following notification:



a) Click **Yes** to approve the course. To return to the **Approve/Deny Course** screen, click **Cancel**.

11) To verify that the course was successfully approved, you can go back to the **View Courses** section to view the course status.



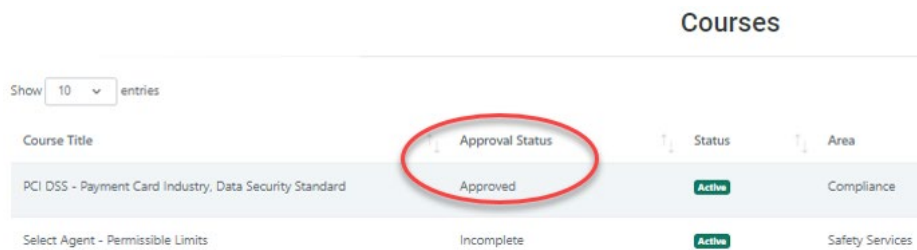
The screenshot shows a table titled "Courses" with a search bar and a "Show 10 entries" dropdown. A red arrow points to the "Approval Status" column header. The table contains the following data:

Course Title	Approval Status	Status	Area	Course Role	Created by	Created Date	Actions
Typical HIPAA Mistakes	Approved	Active	Compliance	Standard		2023/02/09 12:23	View Manage
Typical Parental Informed Consent Mistakes	Approved	Active	Compliance	Standard		2023/02/09 12:45	View Manage
Typical Retrospective Chart Review Audit Findings and How to Prevent Them	Approved	Active	Compliance	Standard		2023/02/09 11:57	View Manage
Utility Cart Safety Training	Approved	Active	Safety Services	Quick-Training		2023/03/10 11:19	View Manage

a) Below are the course approval status descriptions:

- Incomplete** The course has not been configured completely
- Pending** The course was saved for later but can still be modified
- Completed** The course was submitted for approval
- Approved** The course was approved by the committee
- Denied** The course was denied by the committee

12) The **Approved Status** for the course you have reviewed should say **“Approved”**:



The screenshot shows a table titled "Courses" with a search bar and a "Show 10 entries" dropdown. A red circle highlights the "Approved" status in the "Approval Status" column for the course "PCI DSS - Payment Card Industry, Data Security Standard". The table contains the following data:

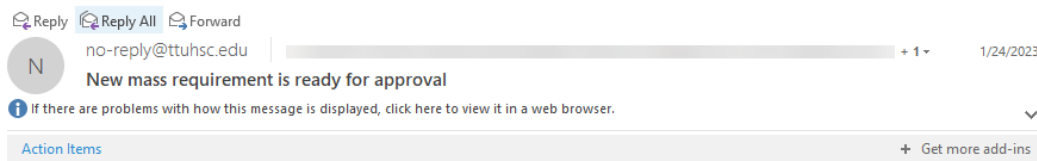
Course Title	Approval Status	Status	Area
PCI DSS - Payment Card Industry, Data Security Standard	Approved	Active	Compliance
Select Agent - Permissible Limits	Incomplete	Active	Safety Services

APPROVAL – APPROVE MASS REQUIREMENTS

A Mass Requirement is a training that is assigned to a large group of individuals. As a Committee Member, you will be responsible for approving the Mass Requirements that are assigned in Tech Training.

*Note: The Mass Requirements only require approval from **one** Committee member. If a Mass Requirement has already been approved by a Committee member, no further action is required.*

- 1) When a user submits a Mass Requirement, you will receive an email notification prompting you to review and approve the Mass Requirement.
 - a) To access the Mass Requirement, click on the [Tech Training Website](#) link at the bottom of the email.



Dear Committee:

The mass requirement 2023 General Compliance Training has been submitted for your approval

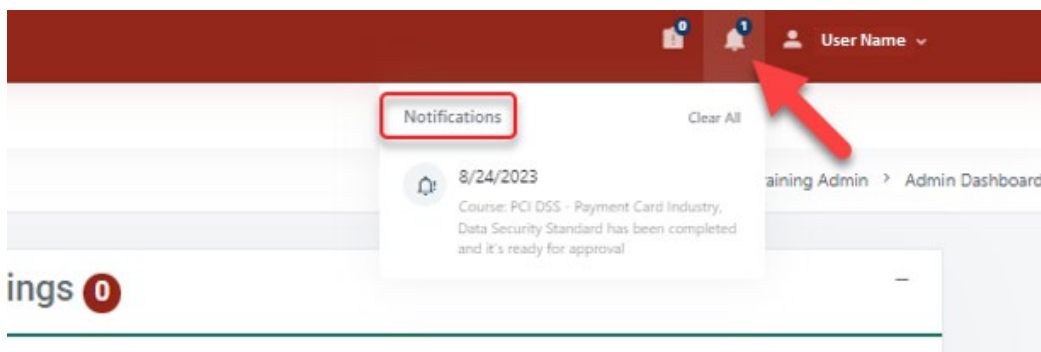
Created By: [Redacted]

Created Date: 1/24/2023

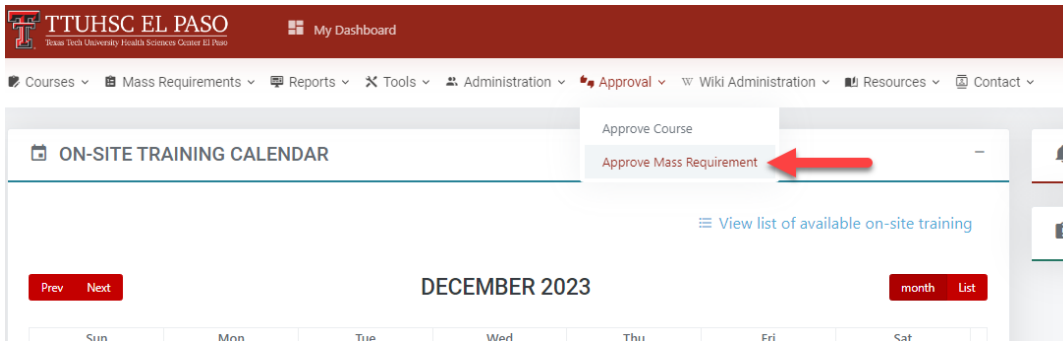
Please log in to the [Tech Training Website](#) for more details.

Confidentiality Notice: This message, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure, or distribution is strictly prohibited. If you are not the intended recipient, please contact the sender by reply e-mail and destroy all copies of the original message.

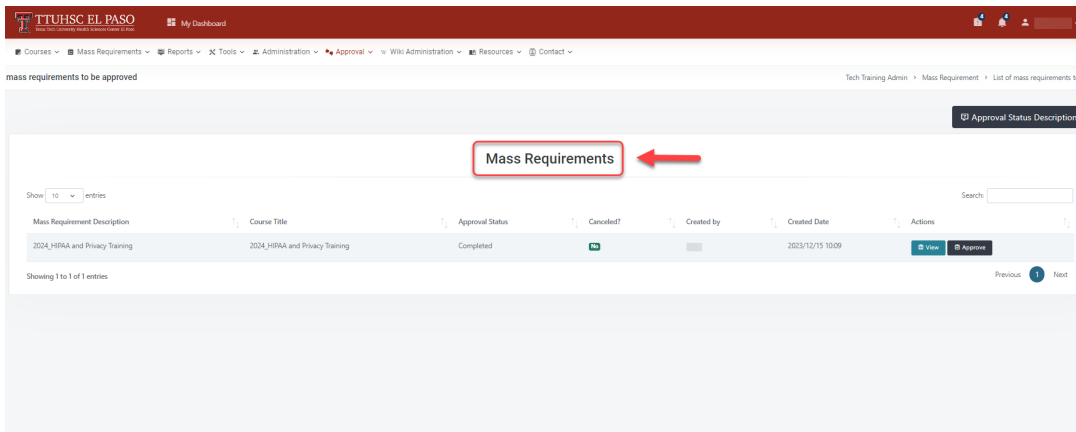
- 2) Once you are logged into Tech Training, you will also receive a notification at the top right corner of the screen. To view your notifications, click on the bell icon.



- 3) To review the Mass Requirement, go to the **Approval** dropdown at the top of the screen then click on **Approve Mass Requirements**.

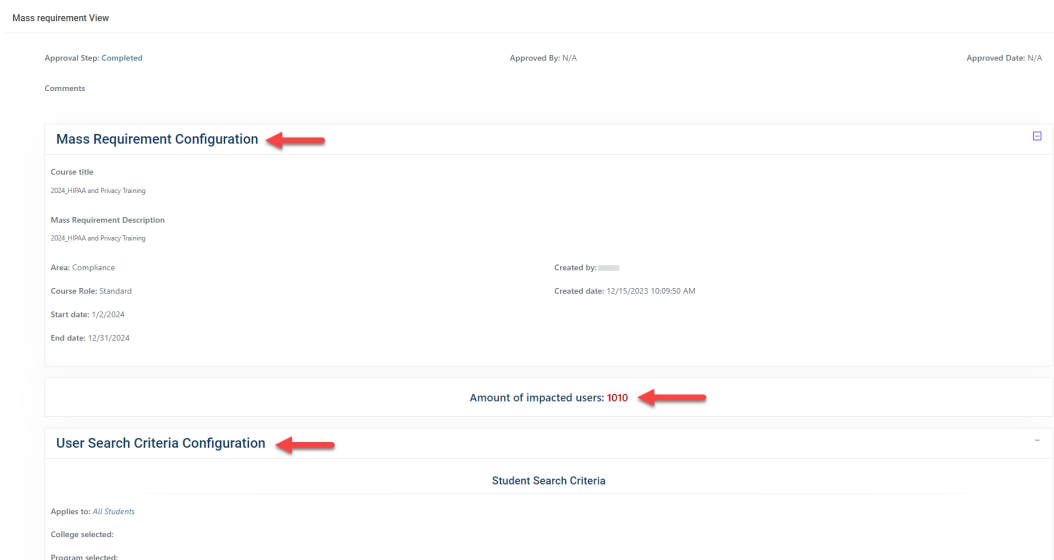


4) Next, you will be taken to the **Mass Requirements** screen:



5) To review the Mass Requirement, click on the **View** button in the **Actions** column.

a) When you click **View**, you will be able to see the **Mass Requirement Configuration**, the **Amount of impacted users** (users the training will be assigned to) and the **User Search Criteria Configuration**.



- 6) Once you have reviewed all of the details for the Mass Requirement and are ready to approve, go back to the **Mass Requirements** screen and click on the **Approve** button in the **Actions** column.

Mass Requirements

Approval Status	Canceled?	Created by	Created Date	Actions
Completed	No	oeze	2023/12/15 10:09	<input type="button" value="View"/> <input type="button" value="Approve"/>

Previous **1** Next

- 7) You will see the following pop-up:

Approve/Deny mass requirement ✕

Approving the mass requirement will send notification to all users that a new course has been assigned to them.

Title:
2024_HIPAA and Privacy Training

Mass requirement description:
2024_HIPAA and Privacy Training

Created by:
[Redacted]

Created Date:
2023/12/15 10:09

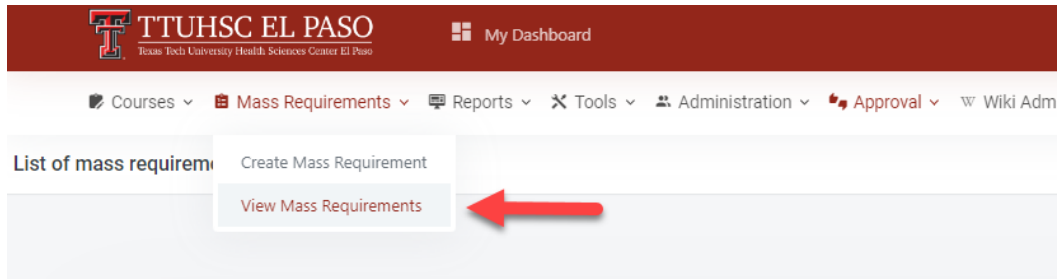
Comments
Approval/Denial comments

- a) If you are denying the Mass Requirement, make sure you include the **specific reason** in the comments. This will assist the individual that created the Mass Requirement in making any necessary changes/edits.
- 8) Before clicking on the **Approve** button, enter a comment for the individual that has submitted the Mass Requirement.
- a) Example Comment: “Mass Requirement is approved. The training course has been approved by the Committee. 01/21/23 AF”

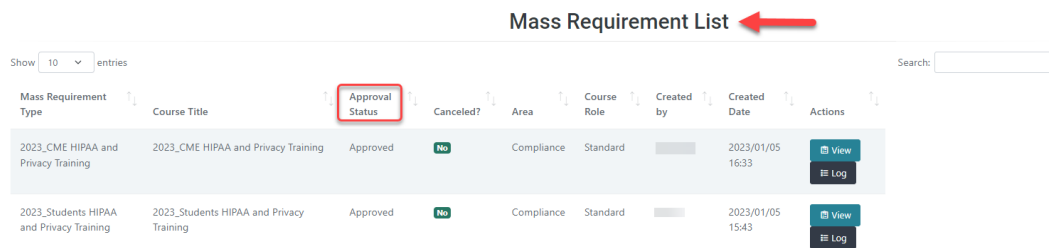
*Note: The selected users will be assigned the training immediately after the **Mass Requirement** has been approved by a Committee member.*

- 9) Next click on the **Approve this Mass Requirement** button. **Need to add snippet here**

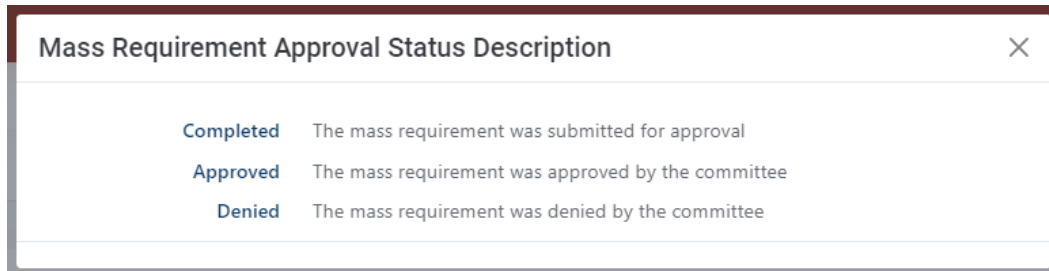
10) To verify that the Mass Requirement was successfully approved, you can go back to the **Mass Requirements** at the top of the screen, then click on **View Mass Requirements**.



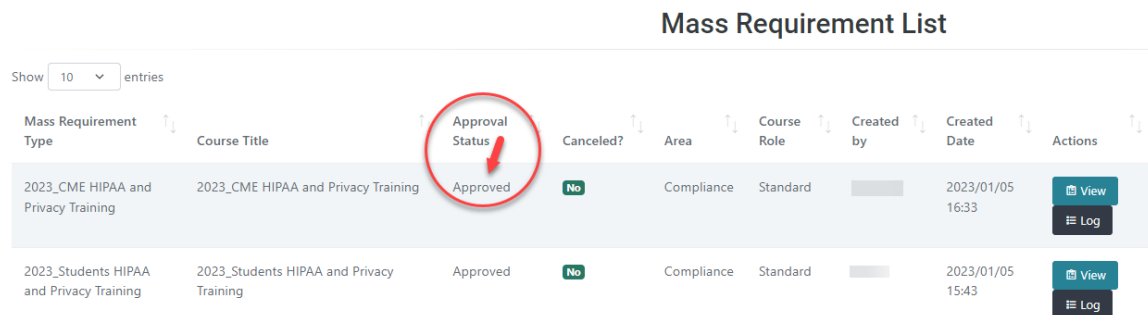
11) In the **Mass Requirement List** screen, you will be able to verify the status of the Mass Requirement under the **Approval Status Column**.



b) Below are the **Mass Requirement Approval Status Descriptions**:



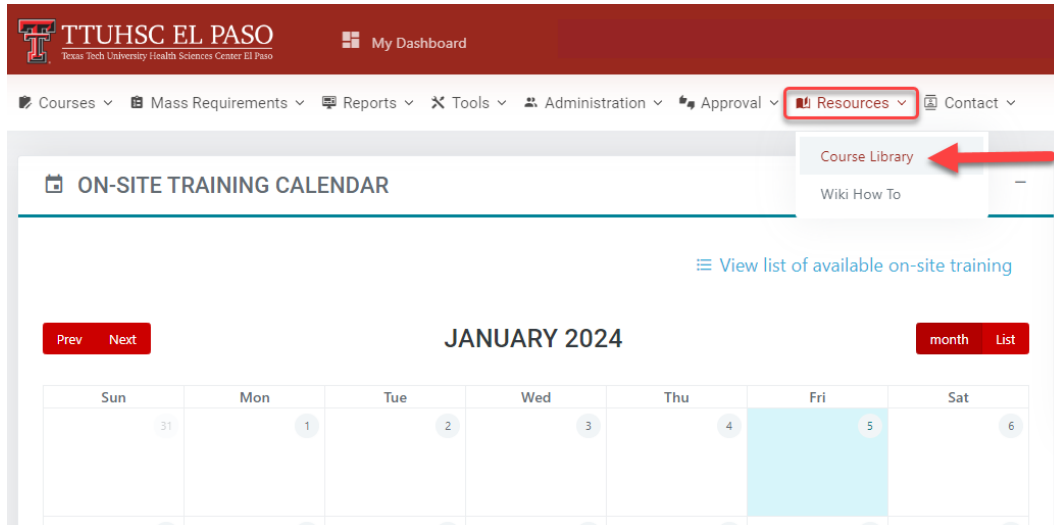
12) The Approved Status for the Mass Requirement you have reviewed and approved should say **Approved**.



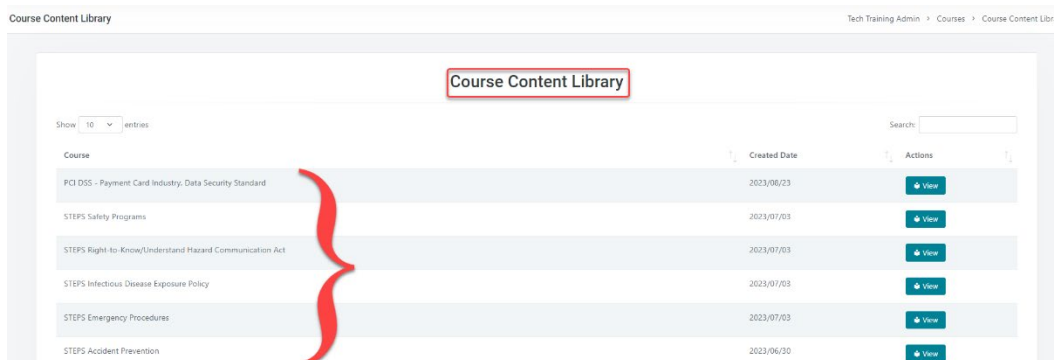
RESOURCES – COURSE LIBRARY

This function will allow the user to see and download the training content without having to retake the course.

- 1) To go to the **Course Library**, click on the **Resources** dropdown at the top of the page and click on **Course Library**.



- 2) This will take you to the **Course Content Library** screen. In this page, you will be able to see all the trainings that have been uploaded.



- a) Click on the  button to view the content for your desired training(s).

- 3) Next, you will see the **Course Content** page which allows you to see the details for that training.

- a) You can also download the **Course Files** for that course.

PCI DSS - Payment Card Industry, Data Security Standard

Course Details

Alternate Title

PCI DSS - Payment Card Industry, Data Security Standard

Course Description

This course provides an overview of Payment Card Industry Data Security Standards (PCI-DSS) and payment card processing policies and procedures.

Objectives

Gain an understanding of PCI-DSS requirements and payment card processing policies and procedures.

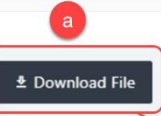
Outline

- What is PCI DSS?
- Third-Party Vendors
- PCI DSS Requirements
- Security Features
- Record Retention
- Processing Payment Cards
- Precautions
- Incident Response
- SAQ
- Taking Payments Over the Phone
- Policies and Procedures

Course Files

PCI DSS - Payment Card Industry, Data Security Standard

File Descriptions
PowerPoint Presentation

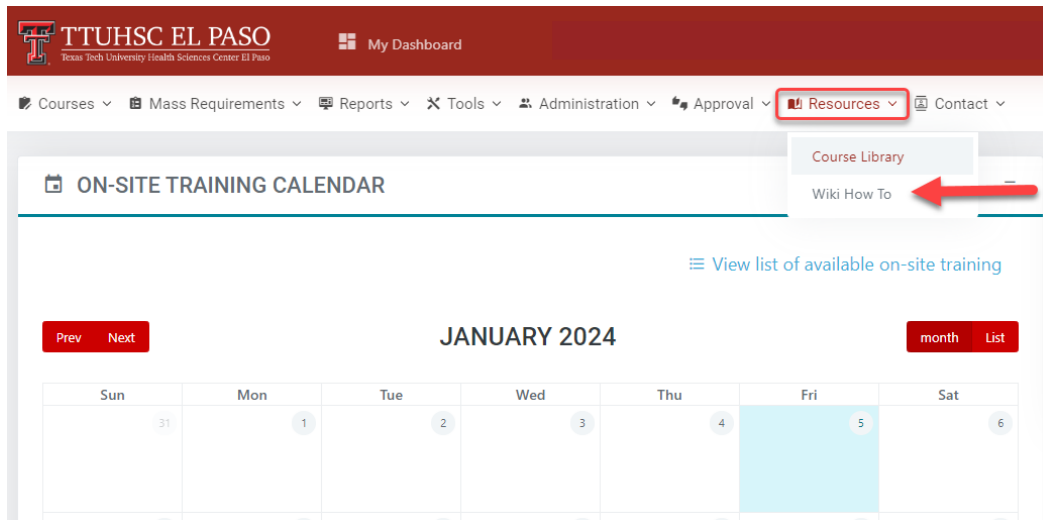


RESOURCES – Wiki How To

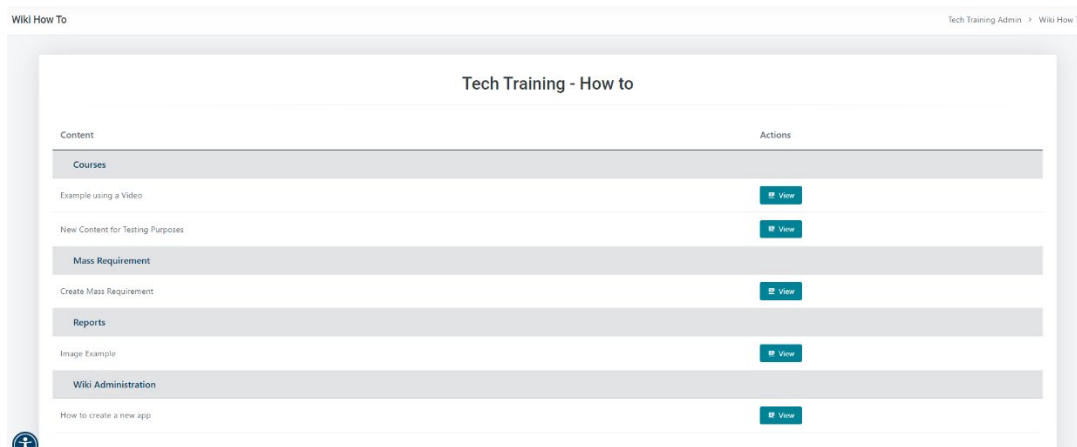
This feature will allow the user to see instructional videos, images or documents on different functions within the Tech Training application.

Note: Functions available vary depending on the user's role.

- 1) Go to the **Resources** dropdown at the top of the page and click on **Wiki How To**.



- 2) This will take you to the **Wiki How To** page. In the **Tech Training – How to** section you can see the instructional videos, documents, and images on various topics.



- 3) To see a specific section, click on the **View** button next to the name of the desired topic. This will display the content for that section.

Content View

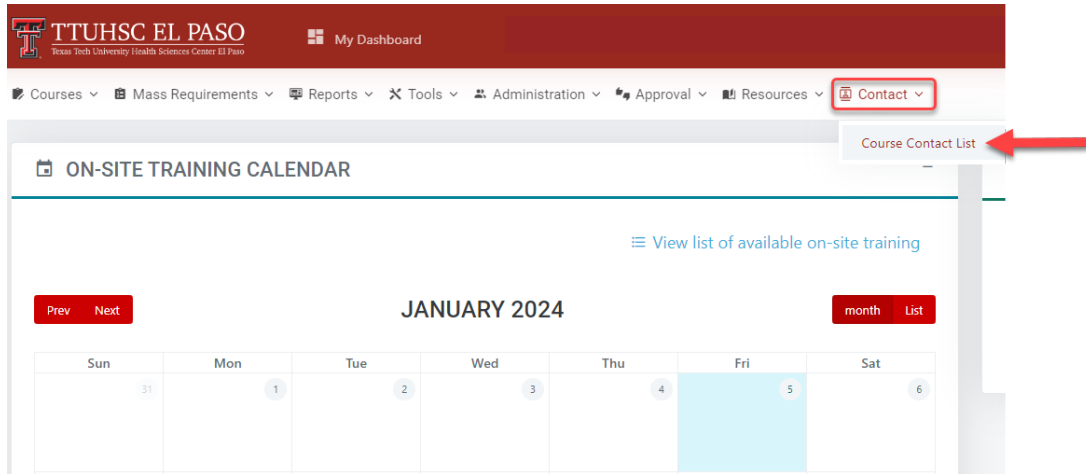
Example using a Video

The screenshot displays a content view interface. On the left, a 'Wiki Details' sidebar lists metadata: Application: Tech Training, Category: Courses, Created By, Created Update Date: 8/29/2023 3:16:30 PM, Updated By, and Last Update Date: 9/26/2023 11:29:46 AM. The main 'Wiki Content' area features a video player titled 'EXAMPLE VIDEO 1'. The video player shows a 'Video unavailable' error with a 'Watch on YouTube' link. Below the video player, the text 'TEST 2' is visible.

CONTACT – COURSE CONTACT LIST

This function will assist the user when an individual has been locked out of a training. This feature includes a list with the contact information for the owners of the trainings.

- 1) Go to the **Contact** dropdown at the top of the page and click on **Course Contact List**.



- 2) This will take you to the **Course Contact List** screen where you can see the list of all the trainings, the name of the owner, phone number and email.

