

Training Management Quick Guide

Welcome to Oregon Care Partners' Training Management platform! We have created this quick guide to help you assist staff members with linking their Oregon Care Partners accounts to your location for training management.

How it Works

The platform was designed to ensure staff members maintain full control and ownership of their assigned and independent class completion records within their Oregon Care Partners account.

After your location is approved for a training management account, you can invite employees to link their Oregon Care Partners accounts with your location.

A staff member can link their Oregon Care Partners account to multiple locations for training management only by invitation from their employer.

Once a staff member has linked their account to their employer's location, they will be able to receive assignments and notifications, and share class completion records taken independently before and after linking to the location.

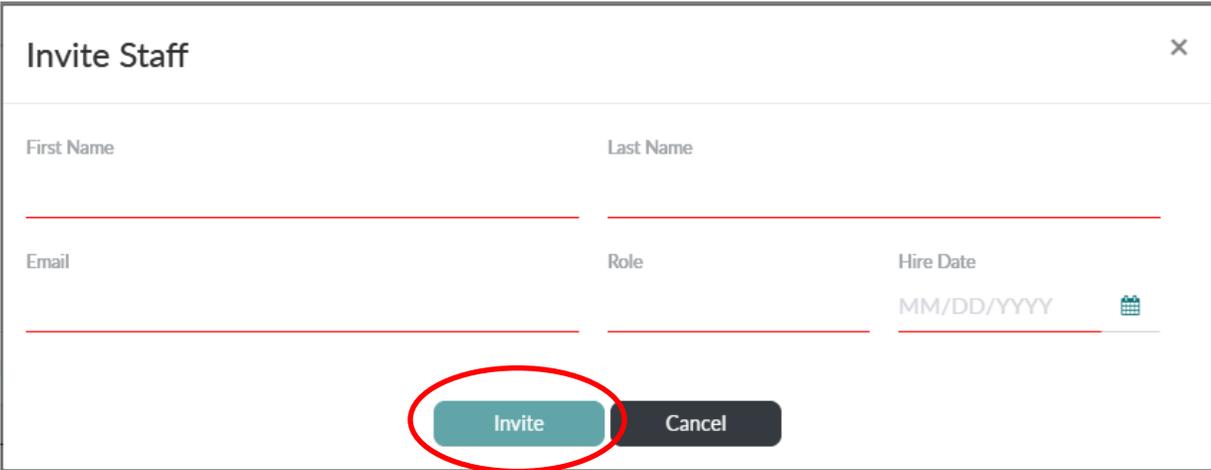
Assigned training records will automatically be retained by both the staff member and the employer location. As a training administrator, you will have the option to accept or reject shared records from a staff member.

Invite Staff to Link Account

Staff are invited by completing the +Add Staff form on your training management dashboard.

For the best experience, before adding staff, ask each staff member to provide the email address used on their Oregon Care Partners account. This will help staff members keep all their training records in one account.

For staff members without an account, ask for the preferred email address they would like to use to create a new Oregon Care Partners account.



The screenshot shows a web form titled "Invite Staff" with a close button (X) in the top right corner. The form contains four input fields: "First Name", "Last Name", "Email", and "Role". The "Hire Date" field is a date picker with a calendar icon and the format "MM/DD/YYYY". At the bottom of the form, there are two buttons: "Invite" (highlighted with a red circle) and "Cancel".

Link Account Invitations

Clicking “Invite” on the form sends an email to the staff member with the subject “Invitation to link OCP training account”. Staff members will need to click “Continue” in the body of the email to open the “Link Account Invitation” page and complete the steps to link an account.

If a staff member does not receive the invitation, have them check their junk or spam folder and verify the invitation was sent to the correct email address.

Subject: Invitation to link OCP training account

Your employer has invited you to link your Oregon Care Partners training account to your organizations training management system powered by Oregon Care Partners.

Invitation sent by:

OREGON LONG-TERM CARE COMMUNITY
123 STREET
PORTLAND, OREGON 97201

This link is unique to you. Please do not forward this email.

[Continue](#)

Linking your Oregon Care Partners training account adds new features to your Caregiver Dashboard:

- Share class completions with your employer
- View and track class assignments and due dates
- Receive notifications about upcoming due dates and assignments
- Manage linked employers
- Print transcripts

If you have any questions, please [contact us](#) for assistance.

Thank you,
Oregon Care Partners

Link Account Options

Different options are presented to staff on the “Link Account Invitation” page depending on whether the email address associated with the invitation is an Oregon Care Partners account email address.

Each staff member will choose how they wish to link to the location for training management from one of the following sets of options:

- Accept Invitation; Link to a Different Oregon Care Partners Account
- Create a New Account; Link an Existing Oregon Care Partners Account.

Staff members who choose to “Accept Invitation” or “Link to a Different or Existing Oregon Care Partners Account” will need to enter their email and password to link the account to the location.

Staff members who choose to create an account will need to:

- Complete the “Create an Account” form.
- Locate the account verification email and click “Verify Email Address” to activate their account to link to your location.

If they do not receive the account verification email, have them check their junk or spam folder and add info@oregoncarepartners.com to their contact list.

Any information updated by a staff member during the invitation process will also be updated on the staff member’s profile in your training management dashboard.

New Features for Linked Training Accounts

Linking an Oregon Care Partners training account to an employer adds new features to the staff member's Caregiver Dashboard. Linked staff members will be able to:

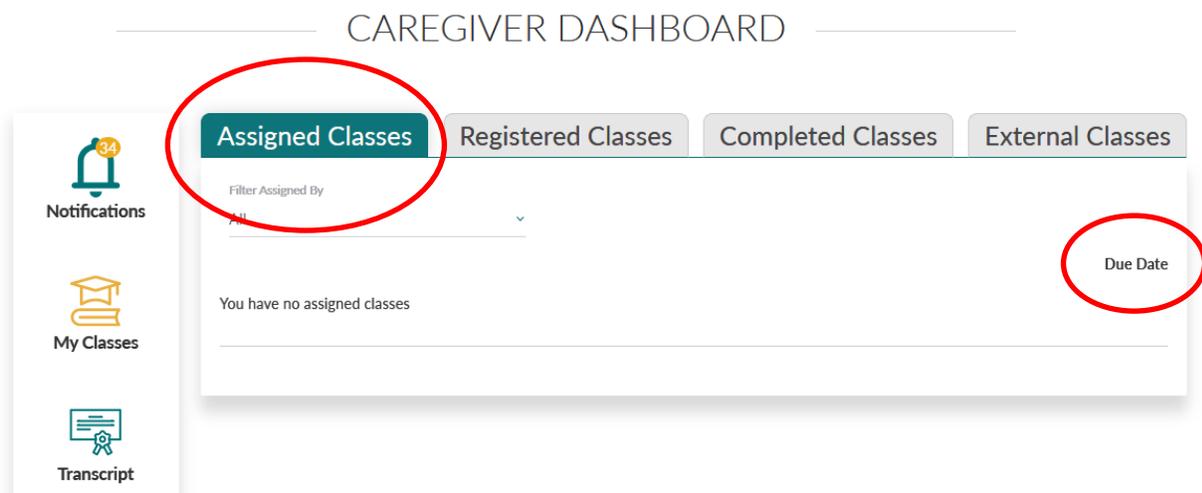
- View and track class assignments and due dates.
- Receive notifications about due dates and assignments.
- Share independent training records with employers.
- Print transcripts.
- Manage linked employers.

Assigned Classes

Staff members can view assignments on the Assigned Classes tab in their Caregiver Dashboard.

On the assigned classes tab, staff members can:

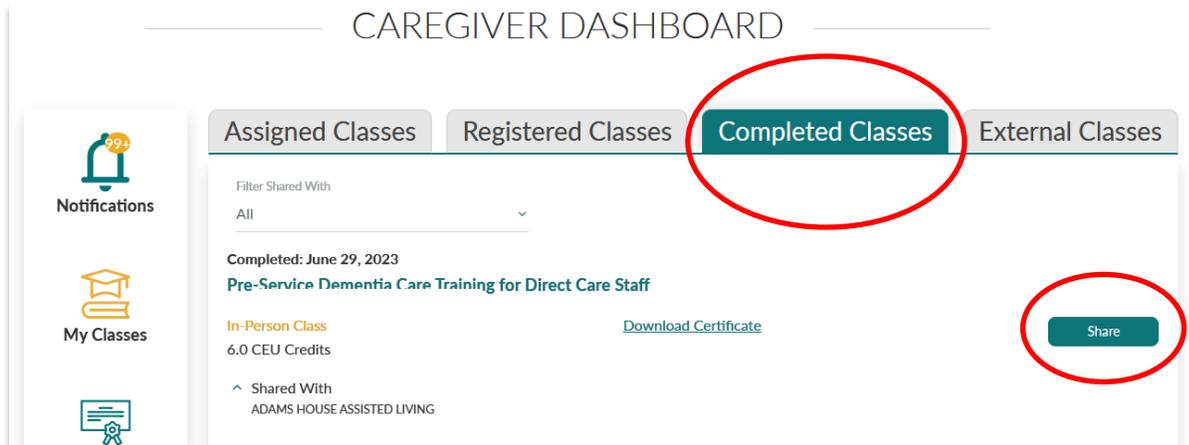
- View class assignments in order by due date.
- View class assignments without due dates.
- Quickly identify past due assignments with due dates in red text.
- Filter assignments by employer location.
- View which employer location assigned each class.



Share Class Completions

Staff members can share independent class completion records by clicking the “Share” button to the right of the class on the Completed Classes tab in the Caregiver Dashboard.

Staff members will receive a notification when an employer location accepts or rejects their shared class completion record.

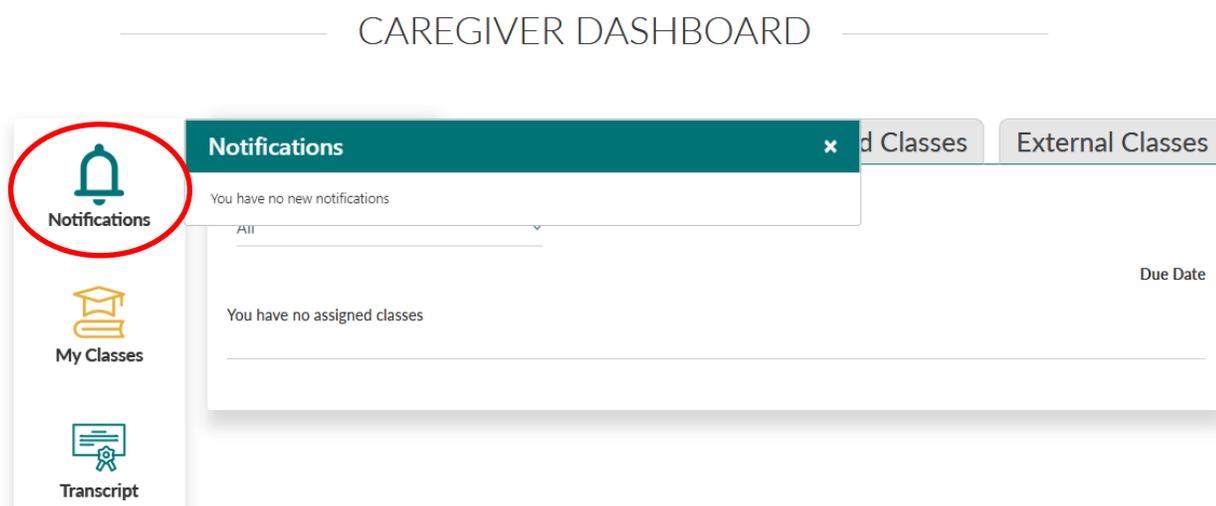


Notifications

To access the notifications window, staff members can click on the “Notifications” icon in the left side navigation bar of their Caregiver Dashboard to view and dismiss notifications.

Linked staff members will receive the following notifications:

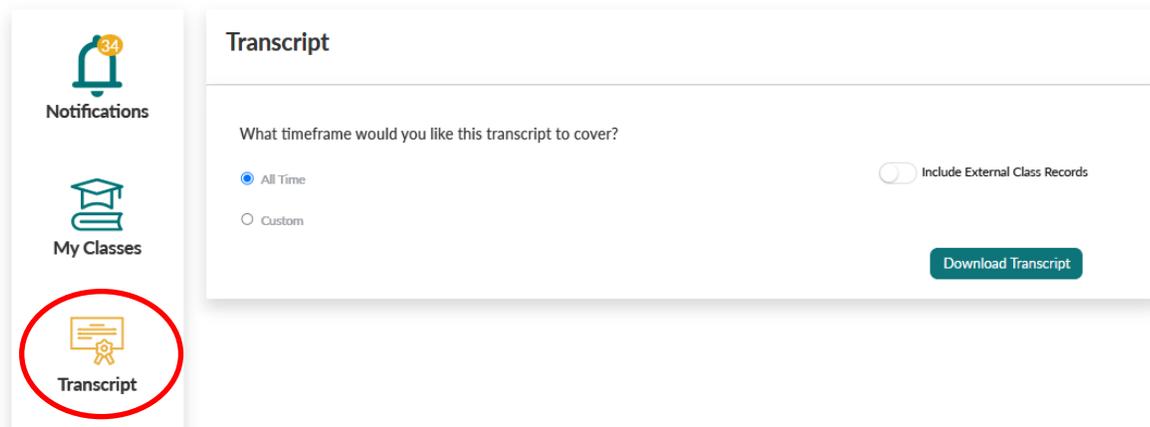
- New assignments
- Due date reminders
- Changes to assigned classes and due dates
- When a shared record is accepted or rejected



Print Transcripts

Staff members can generate a transcript of their class completion records by clicking the “Transcript” icon in the left side navigation bar from their Caregiver Dashboard. From the transcript page, they can select the timeframe and click “Download Transcript” to download their class completion records.

CAREGIVER DASHBOARD

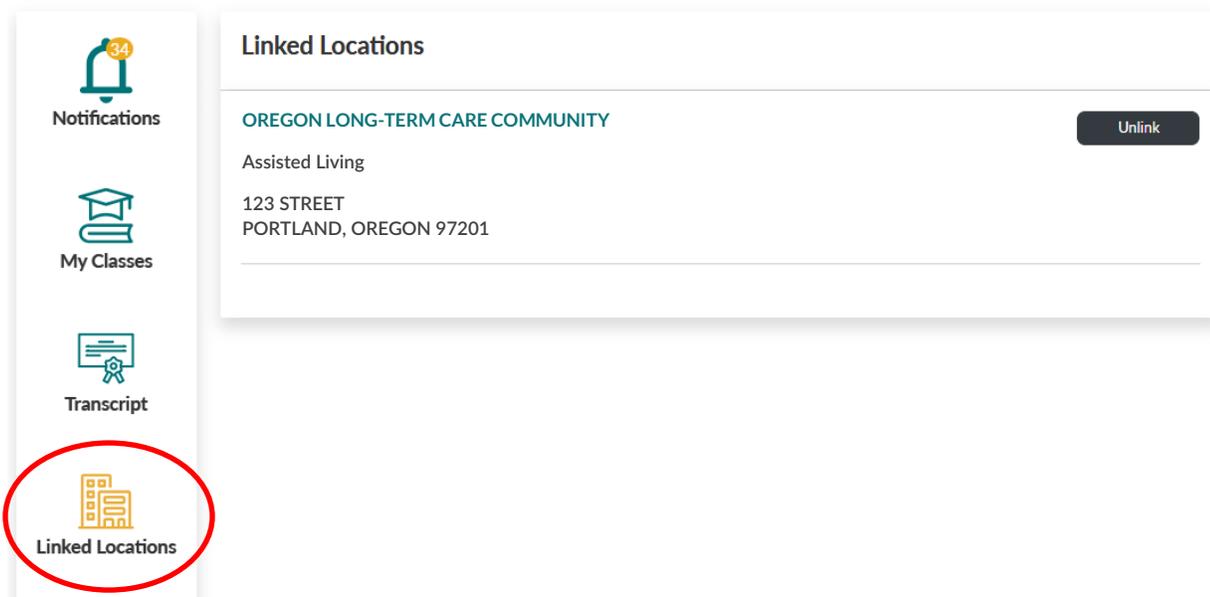


Manage Linked Locations

Linked locations can be managed by clicking the “Linked Locations” icon in the left side navigation bar from the Caregiver Dashboard.

From the linked locations page, staff members can view and manage linked employer locations.

CAREGIVER DASHBOARD



Unlinking from an Employer Location

If a staff member discontinues working for a linked employer location, they can unlink from that location by clicking the “Unlink” button.

IMPORTANT – Unlinking from a location cannot be undone.

Staff members will receive a warning message if they attempt to unlink a location and will be asked to confirm they wish to take this action.

If a staff member unlinks from an employer location:

- The staff member and employer retain copies of assigned and shared completion records.
- Incomplete assignments from the employer will be removed from the assigned classes tab.
- The training administrator will receive a notification on the location’s training management dashboard.

Unlinking does not prevent an account from linking to that location again in the future.
