

# Training Management Guide



This guide provides instructions on how to use the features of the Oregon Care Partners training management platform.

## ABOUT THE PLATFORM

Oregon Care Partners' free training management platform enables long-term care organizations to manage staff training and streamline onboarding, record keeping, and reporting. The platform is available to licensed adult foster homes, assisted living, residential care, and memory care communities, skilled nursing facilities, and in-home care and home health agencies in Oregon.

## 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 (OCP) training account.

After your location is approved for a training management account, you can invite employees to link their OCP account with your location. A staff member can link their OCP 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. As a training administrator, you will have the option to accept or reject shared records from a staff member.

## FEATURES

The training management platform enables long-term care organizations to create training administrator accounts, invite their staff to the platform, and track training progress and outcomes.

Training administrators will be able to:

- Manage staff training by location on a training management dashboard
- Invite staff to link an OCP account to their location for training management
- Create a catalog of OCP classes for each location
- Assign training to staff
- Track staff training status
- Send emails to staff
- Retain training records assigned by or shared with the location for all staff linked to the location
- Print training reports for compliance

# Contents

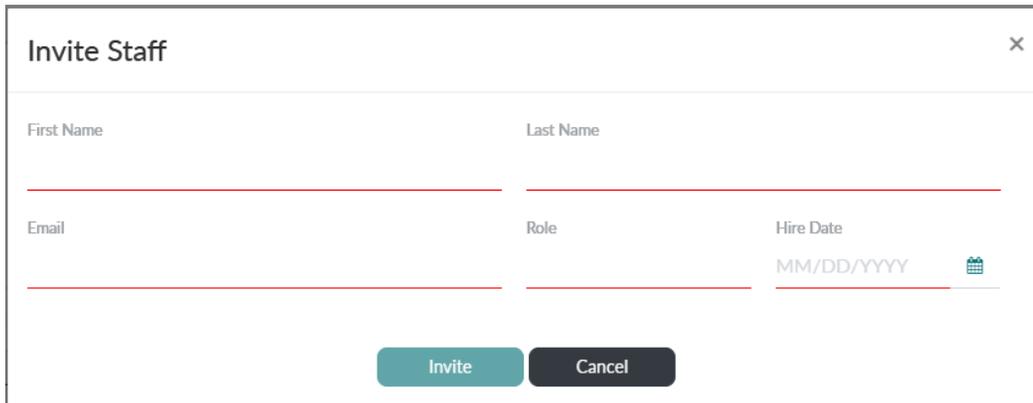
- HOW TO INVITE STAFF TO LINK AN OCP TRAINING ACCOUNT TO THE TRAINING MANAGEMENT DASHBOARD ..... 4**
  - LINK ACCOUNT INVITATIONS ..... 4
  - LINK ACCOUNT OPTIONS..... 5
- HOW TO ASSIGN CLASSES ..... 6**
  - ASSIGN ONLINE CLASSES..... 6
    - Setting Due Dates for Online Class Assignments ..... 7
  - ASSIGN IN-PERSON AND WEBINAR CLASSES ..... 8
    - Class Status Definitions ..... 9
- HOW TO UNASSIGN CLASSES ..... 10**
  - UNASSIGN CLASSES FROM MY CATALOG TAB ..... 10
  - UNASSIGN CLASSES FROM MY STAFF TAB ..... 11
- SHARED COMPLETION RECORDS FROM STAFF ..... 12**
- TRAINING REPORTS ..... 13**
  - MY STAFF TAB ..... 13
  - MY CATALOG TAB ..... 14
- MANAGE STAFF RECORDS ..... 15**
  - INACTIVATE STAFF MEMBERS ..... 15
  - REACTIVATE STAFF MEMBERS ..... 16
  - UPDATE STAFF PROFILE INFORMATION ..... 16
- NOTIFICATIONS ..... 17**
- FEATURES ON A LINKED OCP TRAINING ACCOUNT ..... 18**
  - ASSIGNED CLASSES TAB ..... 19
  - SHARE CLASS COMPLETIONS WITH EMPLOYER..... 19
  - NOTIFICATIONS..... 20
  - PRINT CERTIFICATES + TRANSCRIPTS ..... 20

# HOW TO INVITE STAFF TO LINK AN OCP TRAINING ACCOUNT TO THE TRAINING MANAGEMENT DASHBOARD

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 OCP account. This will help staff members keep all their training records in one account.
- For staff members without an OCP account, ask for the preferred email address they would like to use to create a new OCP account.



Invite Staff

First Name Last Name

Email Role Hire Date

MM/DD/YYYY

Invite Cancel

## LINK ACCOUNT INVITATIONS

Selecting “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 select “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.

Depending on whether the email the training administrator uses to invite the staff member is associated with an existing Oregon Care Partners account, the staff member will receive a set of options to choose how they wish to link to the location for training management:

1. Accept Invitation or Link to a Different Oregon Care Partners Account
2. Create a New Account or 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.

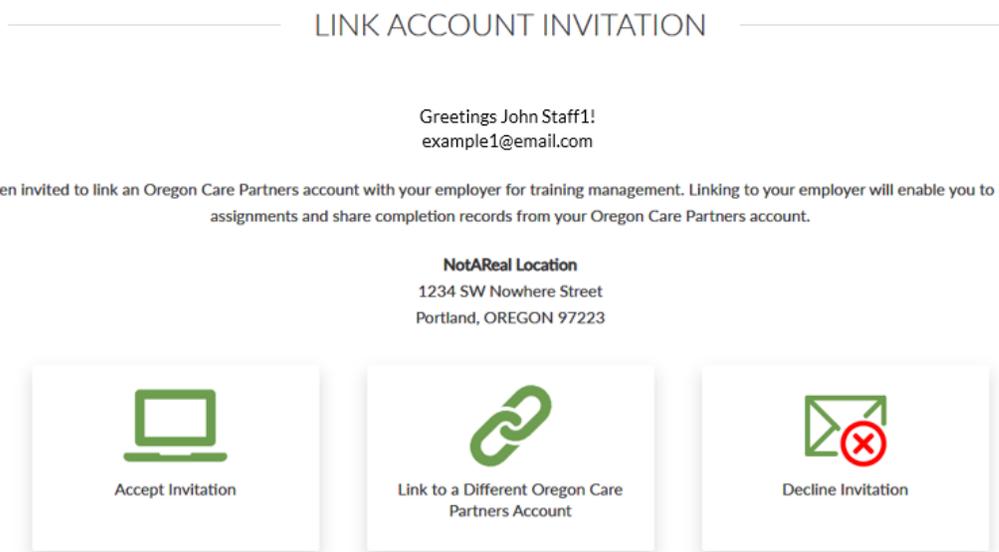
Staff members who choose to create an account will need to:

- Complete the “Create an Account” form.
- Locate the account verification email and select “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](mailto: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.

Example1:



## HOW TO ASSIGN CLASSES

The training management dashboard offers the ability to manage training assignments for all active staff members linked to your location. You will be able to assign and unassign classes and create and change class due dates.

### ASSIGN ONLINE CLASSES

Classes are assigned to active staff on the My Catalog tab. To assign a class to one or multiple active staff members, follow these instructions:

- Go to My Catalog tab
- From the Active class tab, select the title of the online class you would like to assign to staff members.
- Select the box to the left of each staff member's name who you would like to assign to the online class or select the box at the top to select all.
- Select the "Assign Staff" button on the right above the table.

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223



My Staff | **My Catalog**

Class Type: Online | Topic: | Provider: | Search:

Language:

Active |  Inactive

+ Add Classes | Clear Filters

Date	Class Name	Class Type	City	CEUs	Language	
	Alzheimer's Disease and Related Disorders: ADLs and Behaviors	Online		1.0	English	<input type="checkbox"/>  
	Alzheimer's Disease and Related Disorders: Behaviors	Online		1.0	English	<input type="checkbox"/>  
	Alzheimer's Disease and Related Disorders: Ethical and Family Issues	Online		1.0	English	<input type="checkbox"/>  
	Alzheimer's Disease and Related Disorders: Recreational Activities	Online		1.0	English	<input type="checkbox"/>  

TRAINING DASHBOARD

My Catalog > Active > Alzheimer's Disease and Related Disorders: ADLs and Behaviors



Alzheimer's Disease and Related Disorders: ADLs and Behaviors

Class Type: Online | Search:

Duration: 1 Hour | CEUs: 1.0

Assign Staff |  Copy Email | Clear Filters

Add Assignment | Assigned | Completed

<input type="checkbox"/>	First Name	Last Name	Email	Role	Hire Date	Last Completed Date
<input checked="" type="checkbox"/>	John	Staff1	example1@email.com	Med Tech	05/11/2011	
<input type="checkbox"/>	Lupe	Staff3	example3@email.com	Caregiver	09/20/2023	
<input checked="" type="checkbox"/>	Sarah	Staff2	example2@email.com	Dining	05/17/2024	

Selecting Assign Staff will open a modal window. From here you will see a list the staff you selected, and you can set the Due Date for the assignment to be completed.

## Setting Due Dates for Online Class Assignments

Online classes can be assigned to staff members with or without due dates.

Due dates can be set in two ways for online classes:

1. Select the same due date for all staff assigned in the top due date field and select “Apply to All”.
2. Select a different due date for each staff assigned in the due date field in line with their name.

Finish the assignment by selecting the “Assign” button in the bottom right corner of the modal window.

First Name	Last Name	Role	Hire Date	Last Completed Date	Due Date
John	Staff1	Med Tech	05/10/2011		MM/DD/YYYY
Sarah	Staff2	Dining	05/16/2024		MM/DD/YYYY

The assignments can be viewed from the Assigned tab along with the date assigned and the due date.

First Name	Last Name	Email	Role	Date Assigned	Due Date
John	Staff1	example1@email.com	Med Tech	12/24/2024	01/04/2025
Sarah	Staff2	example2@email.com	Dining	12/24/2024	01/04/2025

Due dates that are past-due will appear in **RED**.

First Name	Last Name	Email	Role	Date Assigned	Due Date
John	Staff1	example1@email.com	Med Tech	12/24/2024	12/26/2024
Sarah	Staff2	example2@email.com	Dining	12/24/2024	01/04/2025

## ASSIGN IN-PERSON AND WEBINAR CLASSES

Classes are assigned to active staff on the My Catalog tab. To assign a class to one or multiple active staff members, follow these instructions:

- Go to My Catalog tab
- From the Active class tab, select the title of the in-person class or webinar you would like to assign to staff members.
- Select the box to the left of each staff member's name who you would like to assign to the in-person or webinar class or select the box at the top to select all.
- Select the "Assign Staff" button on the right above the table.

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223

My Staff My Catalog

Class Type Topic Provider Search

Language

Active Inactive

+ Add Classes Clear Filters

Date	Class Name	Class Type	City	CEUs	Language		
01/08/2025	Life Enrichment	Webinar		3.0	English	<input type="checkbox"/>	<input type="checkbox"/>
01/15/2025	Positive Approach to Alzheimer's and Dementia Care (PAC)	In-Person	Wilsonville	3.0	English	<input type="checkbox"/>	<input type="checkbox"/>
	Alzheimer's Disease and Related Disorders: ADLs and Behaviors	Online		1.0	English	<input type="checkbox"/>	<input type="checkbox"/>

TRAINING DASHBOARD

My Catalog > Active > Life Enrichment

Life Enrichment  
Class Type: Webinar  
Duration: 3 Hours  
CEUs: 3.0

Search

Assign Staff Copy Email Clear Filters

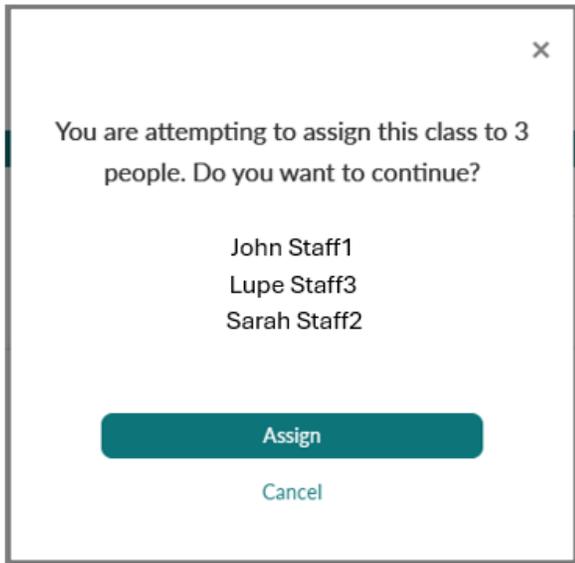
Add Assignment Assigned

<input checked="" type="checkbox"/>	First Name	Last Name	Email	Role	Hire Date
<input checked="" type="checkbox"/>	John	Staff1	example1@email.com	Med Tech	05/11/2011
<input checked="" type="checkbox"/>	Lupe	Staff3	example3@email.com	Caregiver	09/20/2023
<input checked="" type="checkbox"/>	Sarah	Staff2	example2@email.com	Dining	05/17/2024

Selecting "Assign Staff" will open a modal window asking you to confirm the assignments for the staff members you selected.

Due dates for in-person class and webinar assignments will automatically default to the date of the class.

Finish the assignment by selecting the “Assign” button at the bottom of the modal window.



The assignments can be viewed from the Assigned tab along with the date assigned and the due date.

TRAINING DASHBOARD

My Catalog > Active > Life Enrichment

Life Enrichment  
Class Type: Webinar  
Duration: 3 Hours  
CEUs: 3.0

Status Search

Unassign Copy Email Clear Filters

Add Assignment **Assigned**

<input type="checkbox"/>	First Name	Last Name	Email	Role	Date Assigned	Class Date	Status	Score
<input type="checkbox"/>	John	Staff1	example1@email.com	Med Tech	12/24/2024	01/08/2025	Assigned	
<input type="checkbox"/>	Lupe	Staff3	example3@email.com	Caregiver	12/24/2024	01/08/2025	Assigned	
<input type="checkbox"/>	Sarah	Staff2	example2@email.com	Dining	12/24/2024	01/08/2025	Assigned	

Export Class Records

### Class Status Definitions

- ASSIGNED – Class is assigned and awaiting completion.
- ATTENDED:
  - Class was attended for full duration, but the staff member did not complete the post-test evaluation.
  - Class did not offer any CEUs
- MISSED – Class was not attended by the staff member.
- COMPLETED – Class was attended for full duration and the staff member completed the post-test evaluation.

# HOW TO UNASSIGN CLASSES

## UNASSIGN CLASSES FROM MY CATALOG TAB

To remove or unassign classes from My Catalog:

- Go to My Catalog tab
- From the Active class tab, select the title of the class you would like to unassign staff members.
- From the Assigned tab, select the box to the left of each staff member's name who you would like to unassign from the class or select the box at the top to select all.
- Select the "Unassign" button on the right above the table.

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223

My Staff **My Catalog**

Class Type Topic Provider Search

Language

+ Add Classes Clear Filters

Active Inactive

Date	Class Name	Class Type	City	CEUs	Language
01/08/2025	Life Enrichment	Webinar		3.0	English
01/15/2025	Positive Approach to Alzheimer's and Dementia Care (PAC)	In-Person	Wilsonville	3.0	English
	Alzheimer's Disease and Related Disorders: ADLs and Behaviors	Online		1.0	English

TRAINING DASHBOARD

My Catalog > Active > Life Enrichment

Life Enrichment  
Class Type: Webinar  
Duration: 3 Hours  
CEUs: 3.0

Status Search

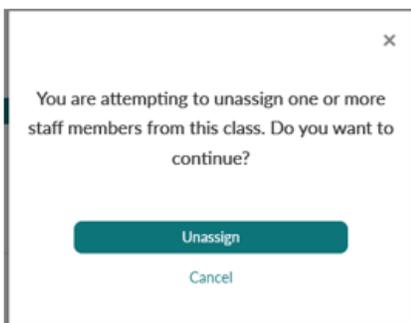
Unassign Copy Email Clear Filters

Add Assignment Assigned

First Name	Last Name	Email	Role	Date Assigned	Class Date	Status	Score
John	Staff1	example1@email.com	Med Tech	12/24/2024	01/08/2025	Assigned	
Lupe	Staff3	example3@email.com	Caregiver	12/24/2024	01/08/2025	Assigned	
Sarah	Staff2	example2@email.com	Dining	12/24/2024	01/08/2025	Assigned	

Export Class Records

Selecting Unassign will open a modal window asking you to confirm the unassignment for the staff you selected. Finish by selecting the "Unassign" button at the bottom of the modal window.



## UNASSIGN CLASSES FROM MY STAFF TAB

To remove or unassign classes from My Staff:

- Go to My Staff tab
- From the Active staff tab, select the “View Staff Records” folder icon to the right of the staff member’s name who you would like to unassign from a class.
- From the Classes tab, select the box to the left of the class title you would like to unassign or select the box at the top to select all.
- Select the “Unassign” button on the right above the table.

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223

My Staff My Catalog

Status Search

+ Add Staff Clear Filters

Active Inactive

First Name	Last Name	Email	Role	Hire Date	Status	
John	Staff1	example1@email.com	Med Tech	05/11/2011	Active	  
Lupe	Staff3	example3@email.com	Caregiver	09/20/2023	Active	  
Sarah	Staff2	example2@email.com	Dining	05/17/2024	Active	  

« 1 »

TRAINING DASHBOARD

My Staff > Active > John Staff1

John Staff1  
Med Tech  
Hire Date: 05/11/2011

Status Search

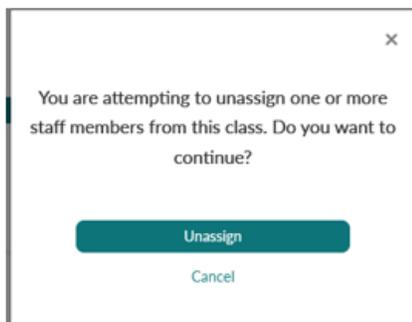
Change Due Date Unassign Assign from My Catalog Clear Filters

Classes Shared

Class Name	Class Type	Date Assigned	Due Date	Date Completed	Date Shared	Class Status	Score
<input checked="" type="checkbox"/> Alzheimer's Disease and Related Disorders: ADLs and Behaviors	Online	12/24/2024	01/04/2025			Assigned	
<input type="checkbox"/> Pre-Service Dementia Care Training for Direct Care Staff	Online	01/31/2024	08/06/2024	01/31/2024		Completed	100

Export Staff Records

Selecting Unassign will open a modal window asking you to confirm the unassignment for the class you selected. Finish by selecting the “Unassign” button at the bottom of the modal window.



## SHARED COMPLETION RECORDS FROM STAFF

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

When a staff member shares a class completion record, the training administrator will receive a notification. Selecting the staff member's name in the notification will take you to their Shared tab in the staff member's class records.

### Notifications

[Dismiss all](#) ✕

**Sarah Staff2 shared a class completion record.**  
Online  
Infection Control Specialist Training for Community-Based Care ✕  
Date Complete: 06/01/2022

**Sarah Staff2 shared a class completion record.**  
Online  
Community-Based Care Values for Protecting Resident Rights ✕  
Date Complete: 12/04/2024

TRAINING DASHBOARD

My Staff > Active > Sarah Staff2 🔔

**Sarah Staff2**  
Dining  
Hire Date: 12/28/2024

Classes **Shared**

Class Name	Notes	Class Type	Date Completed	Date Shared	
Infection Control Specialist Training for Community-Based Care		Online	06/01/2022	12/26/2024	✓ ✕
Community-Based Care Values for Protecting Resident Rights		Online	12/04/2024	12/26/2024	✓ ✕

1/33

As a training administrator, you will have the option to accept or reject shared records from a staff member. Training administrators will receive a warning message if they attempt to accept or reject a shared completion record and will be asked to confirm they wish to take this action.

TRAINING DASHBOARD

My Staff > Active > Sarah Staff2 🔔

**Sarah Staff2**  
Director  
Hire Date: 12/28/2024  
Med Tech

Classes **Shared**

Class Name	Date Completed	Date Shared	
Infection Control Specialist Training for Community-Based Care	06/01/2022	12/26/2024	✓ ✕
Community-Based Care Values for Protecting Resident Rights	12/04/2024	12/26/2024	✓ ✕

1/33

Would you like to accept this shared completion record?

[Accept](#)

[Cancel](#)

# TRAINING REPORTS

Training administrators can download reports in Excel spreadsheet format to allow for easy sorting and management of staff training records for compliance. Oregon Care Partners training reports are approved by ODHS/SOQ for compliance.

## MY STAFF TAB

1. Export Staff List – downloads a list of active and inactive staff member profile information.
2. Export All Records – downloads all records including active and inactive staff member profile information and training records.

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223

TRAINING MANAGEMENT

My Staff My Catalog

Status Search

+ Add Staff Clear Filters

Active Inactive

First Name	Last Name	Email	Role	Hire Date	Status	
John	Staff1	example1@email.com	Med Tech	05/11/2011	Active	  
Lupe	Staff3	example3@email.com	Caregiver	09/20/2023	Active	  
Serah	Staff2	example2@email.com	Dining	05/17/2024	Active	  

« 1 »

Export Staff List Export All Records

3. Export Staff Records – downloads all training records by active or inactive staff member.

TRAINING DASHBOARD

My Staff > Active > John Staff1

John Staff1  
Med Tech  
Hire Date: 05/11/2011

Status Search

Change Due Date Unassign Assign from My Catalog Clear Filters

Classes Shared

Class Name	Class Type	Date Assigned	Due Date	Date Completed	Date Shared	Class Status	Score
Alzheimer's Disease and Related Disorders: ADLs and Behaviors	Online	12/24/2024	01/04/2025			Assigned	
Pre-Service Dementia Care Training for Direct Care Staff	Online	01/31/2024	08/06/2024	01/31/2024		Completed	100

Export Staff Records

## MY CATALOG TAB

1. Export Catalog – downloads a list of active and inactive classes in your class catalog.

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR, 97223



My Staff | **My Catalog**

Class Type: [v] Topic: [v] Provider: [v] Search: [q]

Language: [v] + Add Classes Clear Filters

Active | Inactive

Date	Class Name	Class Type	City	CEUs	Language	
01/08/2025	Life Enrichment	Webinar		3.0	English	 
01/15/2025	Positive Approach to Alzheimer's and Dementia Care (PAC)	In-Person	Wilsonville	3.0	English	 
	Alzheimer's Disease and Related Disorders: ADLs and Behaviors	Online		1.0	English	 
	Alzheimer's Disease and Related Disorders: Behaviors	Online		1.0	English	 

« 1 2 »

**Export Catalog**

2. Export Class Records – downloads all training records by active or inactive class title.

TRAINING DASHBOARD

My Catalog > Active > Pre-Service Dementia Care Training for Direct Care Staff



**Pre-Service Dementia Care Training for Direct Care Staff**  
Class Type: Online  
Duration: 6 Hours  
CEUs: 6.0

Search: [q] Copy Email Clear Filters

Add Assignment: **Assigned** | Completed

	First Name	Last Name	Email	Role	Date Assigned	Due Date	Date Completed	Score
<input type="checkbox"/>	John	Staff1	example1@email.com	Med Tech	01/31/2024	08/06/2024	01/31/2024	100

**Export Class Records**

# MANAGE STAFF RECORDS

## INACTIVATE STAFF MEMBERS

If a staff member discontinues working for an employer location, they can be inactivated and unlinked from that location by selecting the “Inactivate” icon on the My Staff tab. Training administrators will receive a warning message if they attempt to inactivate a staff member and will be asked to confirm they wish to take this action. Inactivating a staff member does not prevent a training administrator from inviting the staff member to link an OCP training account to their location again in the future.

**IMPORTANT – Inactivating a staff member cannot be undone.**

If a training administrator inactivates a staff member:

- The staff member will move from the My Staff Active tab to the Inactive tab.
- The staff members OCP training account will be unlinked from the employer location.
- The staff member and employer retain copies of assigned and shared completion records.
- Incomplete assignments will be removed from the assigned classes.
- The staff member will receive a notification on their Caregiver Dashboard.

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223

TRAINING MANAGEMENT

My Staff My Catalog

Status Search

+ Add Staff Clear Filters

Active Inactive

First Name	Last Name	Email	Role	Hire Date	Status	
John	Staff1	example1@email.com	Med Tech	05/11/2011	Active	  
Lupe	Staff3	example3@email.com	Caregiver	09/20/2023	Active	  
Sarah	Staff2	example2@email.com	Dining	05/17/2024	Active	  

1

✕

You are attempting to inactivate a staff member. This action cannot be undone and will unlink their account and remove all incomplete assignments from this location. You will retain their completion records and they will move to the inactive tab. Do you want to continue?

Inactivate

Cancel

## REACTIVATE STAFF MEMBERS

Training administrators can reactivate an inactive staff member by selecting the “Resend Invite” icon to the right of the staff members name on the My Staff, Inactive tab.

Selecting “Resend Invite” sends an email to the staff member with the subject “Invitation to link OCP training account”. Staff members will need to select “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.

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223

My Staff My Catalog

Search

Clear Filters

Active Inactive

First Name	Last Name	Email	Role	Hire Date	Date Inactivated	Status	
John	Staff1	example1@email.com	Med Tech	10/24/2023	12/24/2024	Inactive	  
Lupe	Staff3	example3@email.com	Caregiver	12/02/2024	12/03/2024	Inactive	  

Export Staff List Export All Records

## UPDATE STAFF PROFILE INFORMATION

The training management platform was designed to ensure staff members maintain full control and ownership of their profile information and class completion records within their OCP training account. For this reason, any information updated by a staff member in their OCP training account will automatically be updated on the staff member’s profile in your training management dashboard.

The only information a training administrator can edit is the staff member’s role (job title) and hire date. A staff member’s profile can be updated by selecting the “Edit” pencil icon to the right of the staff member’s name on the My Staff, Active tab.

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR,97223

My Staff My Catalog

Status Search

+ Add Staff Clear Filters

Active Inactive

First Name	Last Name	Email	Role	Hire Date	Status	
John	Staff1	example1@email.com	Med Tech	05/11/2011	Active	 
Lupe	Staff3	example3@email.com	Caregiver	09/20/2023	Active	 
Sarah	Staff2	example2@email.com	Dining	05/17/2024	Active	 

# NOTIFICATIONS

To access the notifications window, select the “Notifications” icon in the upper right corner of the Training Management page to view and dismiss notifications.

Training Administrators will receive the following notifications:

- Staff member accepts or rejects invitation to link account
- Staff member changes contact information on their account
- Staff member shares a completion record
- Changes to classes in your catalog

TRAINING MANAGEMENT

NotAReal Location  
1234 SW Nowhere Street  
Portland OR 97223



My Staff
My Catalog

Status
Search

+ Add Staff
Clear Filters

Active
Inactive

First Name	Last Name	Email	Role	Hire Date	Status	
John	Staff1	example1@email.com	Med Tech	05/11/2011	Active	  
Lupe	Staff3	example3@email.com	Caregiver	09/20/2023	Active	  
Sarah	Staff2	example2@email.com	Dining	05/17/2024	Active	  

« 1 »

**Notifications**
[Dismiss all](#)
✕

**Sarah Staff2 shared a class completion record.**

Online

Infection Control Specialist Training for Community-Based Care

Date Complete: 06/01/2022

✕

**Sarah Staff2 shared a class completion record.**

Online

Community-Based Care Values for Protecting Resident Rights

Date Complete: 12/04/2024

✕

**A staff member linked to NotAReal Location.**

Sarah Staff2

example2@email.com

✕

## FEATURES ON A LINKED OCP TRAINING ACCOUNT

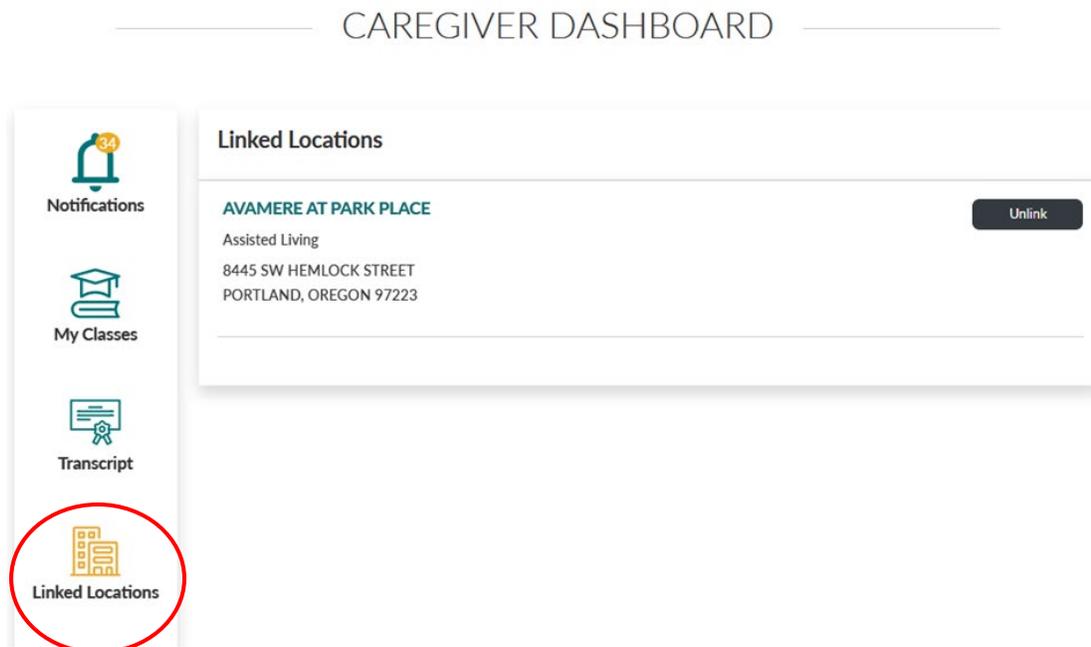
Linking an Oregon Care Partners training account to an employer adds new features to the staff member's Caregiver Dashboard.

Linked staff members will be able to:

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

## MANAGE LINKED LOCATIONS

Linked locations can be managed by selecting 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.



### **IMPORTANT – Unlinking from a location cannot be undone.**

If a staff member discontinues working for a linked employer location, they can unlink from that location by selecting the “Unlink” button. 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. Unlinking does not prevent an account from linking to that location again in the future.

If a staff member unlinks from an employer location:

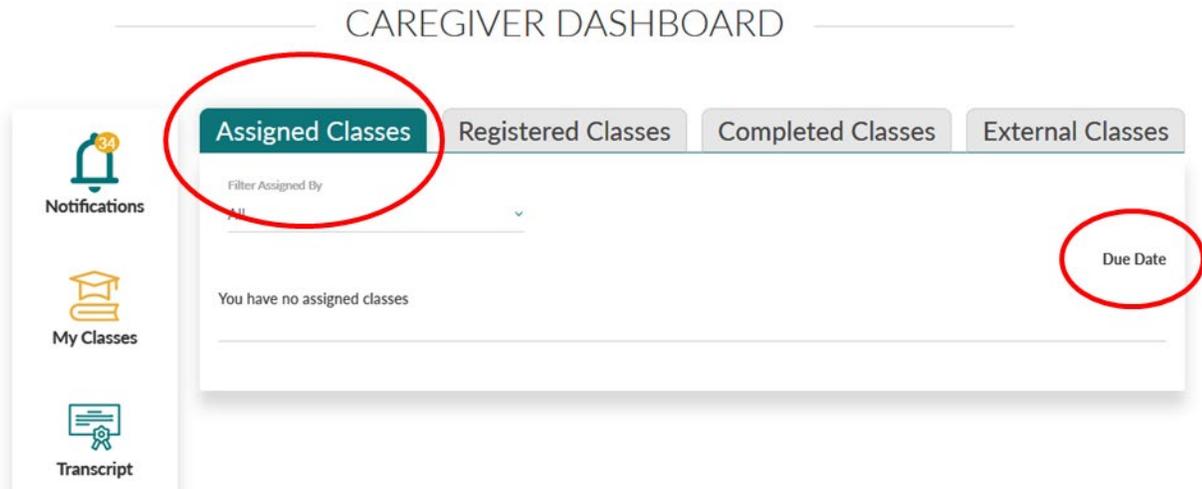
- The staff member and employer retain copies of assigned and shared completion records.
- Incomplete assignments from the employer will be removed from the assigned classes tab.
- The training administrator will receive a notification on their training management dashboard.

## ASSIGNED CLASSES TAB

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

On the assigned classes tab, staff members can:

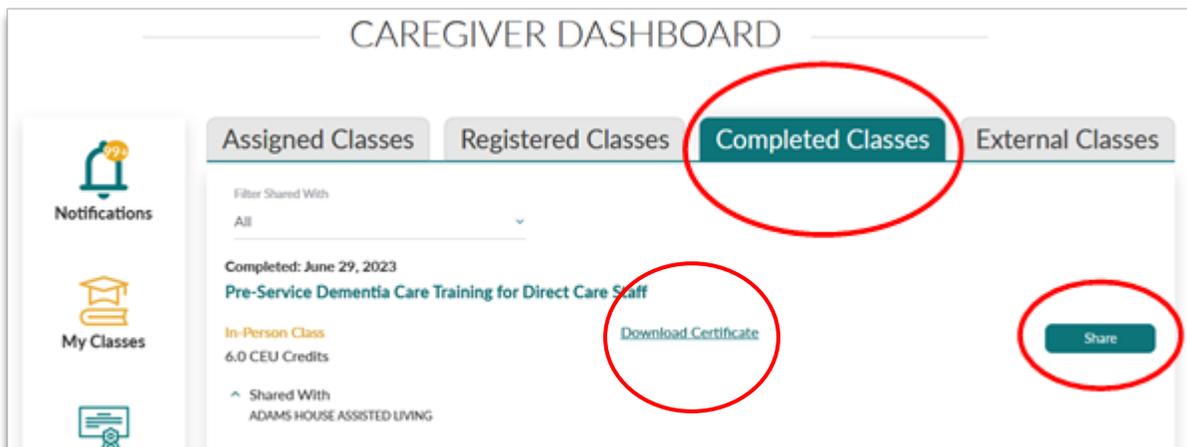
- View class assignments in order by due date
- View class assignments without due dates
- Quickly identify past due assignments with due dates in red text
- Filter assignments by employer location
- View which employer location assigned each class



## SHARE CLASS COMPLETIONS WITH EMPLOYER

Staff members can share independent class completion records with a linked employer in two ways by:

1. Selecting 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 accepts or rejects their shared class completion record.
2. Selecting “Download Certificate” to print or email the certificate to their employer.

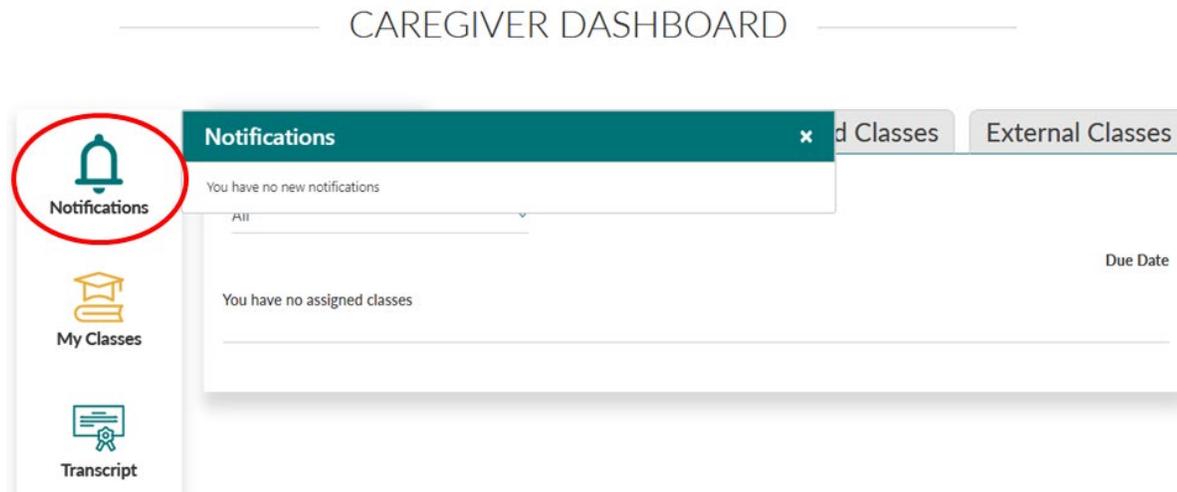


## NOTIFICATIONS

To access the notifications window, staff members can select 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 CERTIFICATES + TRANSCRIPTS

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

