TTAM Version 2 Release Overview

Data Entry:

- **Institutions**: contains data associated with institutions that grant degrees (education), licenses, credentials, or certificates.
- **Persons**: integrated person view that allows agency users to view all information related to a given person, including training tracking and technical assistance related data. This represents the biggest change.
- **Trainers**: enhanced with additional search criteria with link to the person page containing the trainer details.
- **Trainees**: enhanced with additional search criteria with link to the person page containing the trainee details.
- **Trainings**: enhanced with additional search criteria
- **Registrations**: enhanced with additional search criteria
- **Custom Data Types**: contains new custom data management features and expands on the available custom data types.
- **Agency Profiles**: contains new agency profiles for the training transcript and online training calendar.

Custom Search: Adds new custom search categories.

Data Entry

The following categories are listed on the data entry main menu for users with the stated access:

- ***Agency Management***: Users with access to either or both training tracking (TT) and technical assistance management (TA)
- ***TT Data Management***: Users with access to training tracking (TT)
- ***TA Data Management***: Users with access to technical assistance management (TA) – no changes were made to the TT Data Management areas therefore no further documentation is included at this time.
- ***Miscellaneous Data Management***: Users with access to either or both training tracking (TT) and technical assistance management (TA)

Agency Management

The following database links are provided under the Agency Management category:

- Early Care and Learning Facilities
- Classrooms
- Training Facilities
- Institutions
- Persons

Early Care and Learning Facilities: Link previously named "Child Care Facilities". No functionality changes for this area except the Search function. Searches for a care facility can be performed on the Name, City, County, State, Zip, Facility Type, Status, Settings, Provider ID, and/or. License ID. The results can be sorted in ascending or descending order, can have a Listing Type of Summary or Detail and have a set number of Items Per Page.

Classrooms: No changes for this area except the Search function. Searches for a classroom within a care facility can be performed on Name, Care Facility Name, City, County, Status (Active or Inactive), and/or Age Group Served. The results can be sorted in ascending or descending order, can have a Listing Type of Summary or Detail and have a set number of Items Per Page.

Training Facilities: Moved from TT Data Management to Agency Management since facilities can be assigned to Technical Assistance off-site episodes as well as training sessions. New fields available include **Region** and **Instructions**. A region may consist of multiple towns or counties within a service delivery area. The TTAM administrator can configure a list of these regions which will provide a drop down list when entering new training facilities.

Search Training Facilities: Searches for a training facility can be performed on Facility ID, Facility Name, City, Region, State, Zip, Country, and/or Status (Active or Inactive). The results can be sorted in ascending or descending order, can have a Listing Type of Summary or Detail and have a set number of Items Per Page.

Institutions

New database. Institutions are higher learning facilities (formal or informal) from which the trainer and/or trainee receives a license, credential, certificate or degree. Institutions entered into TTAM can be selected when adding license, credential, certificate and education information to the Person record.

Search Institutions: Searches for an institution can be performed on Name, City, County, Region, State, Zip, Country, Type, Scope, Status (Active or Inactive), and/or Settings. The results can be sorted in ascending or descending order, can have a Listing Type of Summary or Detail and have a set number of Items Per Page.

The following screens are included in all Institution records:

- General
- Person Licenses
- Person Credentials
- Person Certificates
- Education Records

General

Available fields include Status, Type, Settings (Accredited Formal Institution, Approved Informal Institution), Scope (agency or state), Name, Description, Street1, Street2, City, County, Region, State, Zip, Country, Latitude (calculated), Longitude (calculated), Contact Name, Contact Phone, Contact Email, and Notes.

Person Licenses
Available fields include Person, Institution (set), Status, Type, Title, Description, State, Country, Issue Date, Expiration Date, Last Renewal Date, Total Credits, ECE Credits, Business Credits, School Age Credits, Youth Development Credits, Total Hours, CDA Hours, Licensing Hours, Recognized Hours, Continuing Education Units, Professional Development Units, Verification Method, Verification Date, Verifier Name, and Notes.

To add license information to a person record, click the "Add New Person License" link; search for and select the desired person and enter the additional required fields. License information tracked by institution can also be added from the Person record using the link on the "Licenses" screen.

Person Credentials
Available fields include Person, Institution (set), Status, Type, Endorsements, Title, Description, State, Country, Issue Date, Expiration Date, Last Renewal Date, Total Credits, ECE Credits, Business Credits, School Age Credits, Youth Development Credits, Total Hours, CDA Hours, Licensing Hours, Recognized Hours, Continuing Education Units, Professional Development Units, Verification Method, Verification Date, Verifier Name, and Notes.

To add credential information to a person record, click the "Add New Person Credential" link; search for and select the desired person and enter the additional required fields. Credential information tracked by institution can also be added from the Person record using the link on the "Credentials" screen.

Person Certificates
Available fields include Person, Institution (set), Status, Type, Endorsements, Grade Level, Title, Description, State, Country, Issue Date, Expiration Date, Last Renewal Date, Total Credits, ECE Credits, Business Credits, School Age Credits, Youth Development Credits, Total Hours, CDA Hours, Licensing Hours, Recognized Hours, Continuing Education Units, Professional Development Units, Verification Method, Verification Date, Verifier Name, and Notes.

To add certificate information to a person record, click the "Add New Person Certificate" link; search for and select the desired person and enter the additional required fields. Certificate information tracked by institution can also be added from the Person record using the link on the "Certificates" screen.

Education Records
Available fields include Person, Institution (set), Status, Education Level, Degree Type, Major, Achievement Date, Start Date, End Date, Specialization, Core Knowledge Area, Total Credits, ECE Credits, Business Credits, School Age Credits, Youth Development Credits, Child Care Credits, Verification Method, Verification Date, Verifier Name, and Notes.

To add education information to a person record, click the "Add New Person Education" link; search for and select the desired person and enter the additional required fields. Education information tracked by institution can also be added from the Person record using the link on the "Education" screen.

Persons

This is a new database. Persons are trainers, trainees and technical assistance recipients. Users are able to view all information related to a given person including training tracking and technical assistance information.

Searches for an individual can be performed on Individual ID, User Name, Last Name, First Name, Area Code, Phone Number, Email, City, County, Region, State, Zip, Birth Date, Social Security Number, Status (Active, Inactive, Pending, Deleted), Settings, and/or Gender. The results can be sorted in ascending or descending order, can have a Listing Type of Summary or Detail and have a set number of Items Per Page.

The following screens are included in all Person records:

- General
- Demographics
- Education
- Employment
- Licenses
- Credentials
- Certificates
- TA Receipts
- Action Logs

General

New fields available include **Previous Last Name** and **Region**.

Demographics

New fields available include **Settings (Email and Online Registration)**.

Education

New fields available include **Institution**, **Degree Type**, **Start Date**, **End Date**, **Core Knowledge Area**, **Business Credits**, **School Age Credits**, and **Youth Development Credits**. Education information can also be added through the Institution record. See Institutions for detailed information.

Employment

New fields available include **Benefits**, **Actual Title**, **Region**, **Turnover Code**, **Verification Method**, **Verification Date**, and **Verifier Name**. Hourly Wage is no longer a required field.

Licenses
License can be added to Person record or through Institution record. See [Institutions] for detailed information.

Credentials
Credentials can be added to Person record or through Institution record. See Institutions for detailed information.

Certificates
Certificates can be added to Person record or through Institution record. See Institutions for detailed information.

TA Receipts
If Person has been a recipient of technical assistance in a project episode, the history of each episode is shown. TA episodes cannot be added through the Person record and must be entered in the Project.

Action Logs
All actions saved to the person's record are compiled and shown on one page. Actions must be added through the person's Trainee or Trainer Action Log screen.

TT Data Management
Trainee
The Trainee search screen has been enhanced with additional search fields. New fields added to the search screen include: Trainer ID, Email, Visibility Option, and Listing Type, and Deleted has been added to the Status field search.

The following screens are included in all Trainee records:

- General
- Trainings Taken
- Training Transcript
- Trainee Action Logs

General
New fields available include **Status**, **Visibility Option**, and **Notes**.

Trainings Taken
Previously referred to as Training History. If trainee has been registered for any training sessions in the TTAM database, the training history is shown. Training registrations cannot be added through the Person record and must be entered in the training session.

Training Transcript
Agency users can generate a trainee training transcript from the trainee's record to print or save. A search feature allows the agency to include specific trainings saved

to the trainee's training history on the transcript. Searches can include content type, content area, training dates, and registration status. Training transcripts can be customized by the TTAM administrator. See Agency Profiles for detailed information.

Trainee Action Logs
Actions specific to the Person's role as a trainee can be added to the record. The TTAM administrator can configure a list of actions from which to choose. Add any applicable Notes for each action. The action is saved automatically with the system date and user name. All trainee actions are also listed under Person > Action Logs. New fields shown on the list of previous actions include Agency Person and Agency (name). New link allows the user to edit saved actions.

Trainer

The Trainer search screen has been enhanced with additional search fields so users can search on more trainer details. New fields added to search screen include: Trainer ID, Email, Training Language Settings, Training Start Date, Average Rate and Listing Type, and Deleted has been added to the Status field search.

The following screens are included in all Trainer records:

- General
- Trainer Experience
- Trainer Expertise
- Trainer Focus
- Specialized Trainings
- State Certifications
- Trainings Taught
- Trainer Action Logs

General
To assign the role of trainer to a Person, click "Make Trainer" from the Person's left navigation menu. To complete the trainer assignment, add the required information, previously contained on the trainer's "Experience" page. Add any applicable specialized training and general notes and change visibility option if desired. Once the trainer is set up, additional information can be added with regards to the percentage of training formats given.

Trainer Experience
Previously this data was combined with the General information above; it is now a separate screen. New fields available include **Status**, **Region**, **Verification Method**, **Verification Date**, and **Verifier Name**.

Trainer Expertise
Previously on the trainer Credentials page; now separate link. No new functionality.

Trainer Focus
Previously on the trainer Credentials page; now separate link. New field: **Focus Area Code**.

Specialized Trainings
Previously on the trainer Credentials page; now separate link. New fields available include: **Status**, **Verification Method**, **Verification Date**, and **Verifier Name**.

State Certifications
Previously on the trainer Credentials page; now separate link. New fields available include: **Status**, **Verification Method**, **Verification Date**, and **Verifier Name**.

Trainings Taught
Previously referred to as Training History. If trainer has been assigned to any training sessions in the TTAM database, the training history is shown. Training sessions cannot be added through the Person record and must be entered in the training session.

Trainer Action Logs
Actions specific to the Person's role as a trainer can be added to the record. The TTAM administrator can configure a list of actions from which to choose. Add any applicable Notes for each action. The action is saved automatically with the system date and user name. All trainer actions are also listed under Person > Action Logs. New fields shown on the list of previous actions include Agency Person and Agency (name). New link allows the user to edit saved actions.

<u>To Add a New Trainer or Trainee</u>
Navigate to Data Entry; click "Search Persons" under Agency Management in the center of the screen or "Persons" under Agency Management from the left navigation menu.

Search to make sure the person is not currently in the database using any of the following fields: Individual ID, User Name, Last Name, First Name, Area Code, Phone, Email, City, County, Region, State, Zip, Birth Date, Social Security Number, Status, Settings, and/or Gender. Choose a Sort Oder, Listing Type and Items per Page if desired.

If the new person is not listed in the search results, click the "Add New Person" link at the top, on the right side of the title bar.

The Person's General screen will be displayed. Enter the Person's information in each applicable field; required fields are indicated with an asterisk (" * ").

Click the Add button to create a record for the new Person. The Person is added by default with the role of Trainee. Additional Person and Trainee information screens will be added to the record and can be accessed using the links in the left navigation menu. See Trainee section for detailed information on each section, including field changes.

To add the role of Trainer to the Person's record, click the "Make Trainer" link in the left navigation menu. The Trainer General screen is displayed; complete the required information and click Add. New Trainer information screens will be added to the Person's record and can be accessed from the left navigation menu, under the Trainer header. See Trainer section for detailed information on each section, including field changes.

Alternatively, new Persons can be added from the Trainer database. Using the "Add New Trainer" link opens an abbreviated General Information screen. The first field allows you to search for and select a Person already in the database. If a record does not already exist for the Person, click the "Create New Person" link. Enter the required information and click the Add button to save. When the screen refreshes, scroll to the bottom and click the Select button to select the new Person. Complete the information required to create the Trainer record.

Trainings
Training searches have been enhanced with additional search fields. New fields added include: Trainer Cost, Status, Affiliate Type, and Affiliate Provider. The results have the new Listing Type option. The field Training Type has been removed from the search.

Registrations
Registration searches have been enhanced with additional search fields. New fields include: Trainee Area Code, Trainee Phone , Trainee Email, Trainee User Name, Trainee Individual ID, Purpose Type, Motivation Type1, Discount Settings, and Status. The results have the new Listing Type option. Date Range fields have been expanded. Training Fee Range, Trainer First and Trainer Last Name fields have been removed from the search.

Miscellaneous Data Management
Custom Data Types
Only users with TTAM administrative access see this link. This is a shortcut to the administration configuration screen. The following categories and fields are configurable:

Practitioner
Practitioner Action Item
Practitioner Level - Administration Track
Practitioner Level - ILP Track
Practitioner Level - Other Track
Practitioner Level - Regular Track
Practitioner Level - Trainer Track

Training
Trainee Action Item
Trainer Action Item
Trainer Job Title
Training Code
Training Type

General
City
Community College
County
Four Year College/University
Other Community Training Organization
Person Certificate Type
Person Credential Type
Person License Type
Position Title
Region

Agency Profiles
New link to setup customizable online training calendar and agency training transcript.

Online Training Calendar Profile
The online training calendar profile allows your agency to have customized views of the training data stored in the TTAM database. TTAM will use this profile data to generate an online training calendar having the look and feel of your agency's web site.

The profile requires the addition of HTML code to generate these screens. Separate header and footer sections are available. Image files must be linked to an online resource with a valid HTML path, as well as a CSS stylesheet file, if using. Only one active profile can be used at one time by an agency.

Training Transcript Profile
The training transcript profile allows your agency to have customized views of the training registration data stored in the TTAM database for each trainee. TTAM will use this profile data to generate a customized trainee training transcript that can have the look and feel of other documents generated by your agency.

The profile requires the addition of HTML code to generate the transcript. Separate header and footer sections are available. Image files must be linked to an online resource with a valid HTML path, as well as a CSS stylesheet file, if using. Only one active profile can be used at one time by an agency.

Custom Search

New query sets have been added and include:
Person Query
Person Education Query
Person Employment Query
Person License Query
Person Credential Query
Person Certificate Query
Institution Query
Practitioner Query
Practitioner Application Query
Action Log Query

For all custom search reports, the results can now be sorted after display. The column headers (field names) can be clicked to sort in ascending order. If additional sorting is necessary, the results can be saved as an Excel file and sorted in Excel.