

# Management Resources

## UNMC Department Compliance Coordinator Training Instructions

The compliance **training and certification** records are available to department compliance training coordinators through the **Management Resources** web page at [net.unmc.edu/mgmt](http://net.unmc.edu/mgmt)

A link to the Management Resources page is also listed under Quick Links on the UNMC Intranet web page.

The screenshot shows the top of the UNMC Medical Center website. The logo is on the left, and navigation links for 'About Us', 'Education', 'Research', and 'News & Events' are on the right. Below the navigation is a large orange banner with the text 'Management Resources'. Underneath the banner, there is a login form with two input fields for 'UNMC NetID' and 'password', and a 'Continue' button. A small text box above the form says 'Enter your UNMC NetID and password in the spaces provided below and click the Continue button.'

After logging in using your UNMC Net ID and password, select Training and Certification.

The screenshot shows the 'Management Resources' menu after a user has logged in. The page title is 'Management Resources' and the date is 'Monday, March 26, 2012'. The menu is divided into three main sections: 'ASSIGNMENTS', 'DEADLINE EXCEPTIONS', and 'REPORTS'. Each section has a list of links.

ASSIGNMENTS	DEADLINE EXCEPTIONS	REPORTS
By Department/Course	By Department/Course	Certificates for Coordinators
By Name for Coordinators	By Name	Certificates for Owners
By Name for Owners		Compliance Due Report - Coord
Course Administration		Compliance Due Report - Owners
		Course Assignees
		Course Details
		Status Report for Coordinators
		Status Report for Owners

### ASSIGNMENTS

Department Compliance Training Coordinators may view Assignments By Department/Course or By Name.

#### Assignments by Name

Select **By Name for Coordinators** to view an individual's record or assign/edit an individual's record.

As you begin typing the individual's last name in the Name Search field, a directory will appear below showing the name and department for employees or the name and program for students that match your search.

## Management Resources Monday, March 26, 2012

ITS
CAMPUS RESOURCES
TRAINING & CERTIFICATION

### Assignments by Name for Coordinators

Use this page to manage training assignments.

Search for the person whose training you want to manage, select them from the list and click the Manage Training button.

#### Name Search Form

last name, first name:

go

selected person:

name	dept.	program
Brent Call		PTW[0]
Matthew S Callaway	ITS Application Services	
Shannon E Callen	Pharmacology/Exp Neuroscience	
Amanda Theresa Calleroz		MDW[3]

Click on the name to select the person that matches your search then click Manage Training

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### Assignments by Name for Coordinators

Use this page to manage training assignments.

Search for the person whose training you want to manage, select them from the list and click the Manage Training button.

#### Name Search Form


last name, first name:

go

selected person:


Matthew S Callaway: Programmer/Analy

The screen below will appear showing the employee or student's name, position, and department followed by a list of their assigned compliance training records including the name of the course, the deadline date, how the training was assigned, and the completed date and the valid to date for training that has been completed.

actions	course	deadline	assigned by	completed	valid to
	BBPEXEMPT	02/22/2008	SYSTEMEMP	01/18/2008	01/16/2009
	BBPEXEMPT 2009 Renewal	01/20/2009	SYSRENEW	01/20/2009	01/19/2010
	BBPEXEMPT 2010 Renewal	01/21/2010	SYSRENEW	01/21/2010	01/20/2011
	BBPEXempt 2011 Renewal	01/13/2011	SYSRENEW	01/13/2011	01/12/2012
	BBPEXempt 2012 Renewal	01/13/2012	SYSRENEW	01/13/2012	01/11/2013
	Cultural Competency	04/05/2010	SYSTEMEMP MSC	02/10/2010	02/09/2011
	Cultural Competency 2011	02/12/2011	SYSRENEW	02/10/2011	02/09/2012
	Cultural Competency 2012	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	HIPAA	02/22/2008	SYSTEMEMP	01/25/2008	12/31/2075
	ITS Addendum 2008 Initial	02/23/2008	KSTROHBE	01/25/2008	01/23/2009
	ITS Addendum 2009	02/19/2009	SYSRENEW	01/23/2009	01/22/2010
	ITS Addendum 2010	02/20/2010	SYSRENEW	02/10/2010	02/09/2011
	ITS Addendum 2011	02/12/2011	SYSRENEW	02/10/2011	02/09/2012
	ITS Addendum 2012	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	SAFETYASSESS	06/26/2009	SYSEMP18	05/29/2009	05/28/2010
	SAFETYASSESS 2010 Renewal	05/26/2010	SYSRENEW	04/28/2010	04/27/2011
	SAFETYASSESS 2011 RENEWAL	04/27/2011	SYSRENEW	03/31/2011	03/29/2012
	SAFETYASSESS 2012 RENEWAL	03/23/2012	SYSRENEW		
	Statement 2011 Renewal	02/12/2011	SYSRENEW	02/10/2011	02/09/2012
	Statement 2009 Renewal	02/19/2009	SYSRENEW	01/22/2009	01/21/2010
	Statement 2010 Renewal	02/20/2010	SYSRENEW	02/10/2010	02/09/2011
	Statement 2012 Renewal	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	Statement of Understanding	02/22/2008	SYSTEMEMP	01/25/2008	01/23/2009

course:  deadline date:    completed date:  

### To assign a new requirement

Click the  add new training icon. Click the drop down arrow in the course field to select the new training to be assigned. Enter the deadline date (usually 15-30 days from the date assigned depending on the requirement and the urgency that it must be completed). Click the Submit button.

course:  deadline date:    completed date:  

### To delete a requirement you assigned in error

Click the  delete icon.


 	ITSADDENDUM	03/30/2012	KCARLSON		
---	-------------	------------	----------	--	--

Delete?

A pop up window will appear to confirm you want to delete, click OK.

The requirement will be deleted from the list. **Note: You can only delete a requirement you have assigned.** Contact the Compliance Office or the Course Owner if a requirement has been assigned in error and should be removed.

## To change BBP to BBP Exempt

Click the  change icon in the actions column next to BBP.

actions	course	deadline	assigned by	completed	valid to
	BBP	03/30/2012	KCARLSON		


Switch to BBP Exempt?


A pop up window will appear, click OK.

The BBP assignment is automatically removed and the BBP Exempt requirement is now assigned, completed and the valid to date entered.

actions	course	deadline	assigned by	completed	valid to
	BBPEXEMPT	03/30/2012	KCARLSON	03/20/2012	03/19/2013


## To mark a requirement complete


Click the  edit icon in the actions column next to the requirement you wish to complete

	SAFETYASSESS 2012 RENEWAL	03/23/2012	SYSRENEW		
---	---------------------------	------------	----------	--	--

The requirement information will appear at the bottom of the screen. Enter the completed date and click Submit.

course:  
SAFETYASSESS 2012 RENEWAL

deadline date:   
03/23/2012

completed date: 



Note: If hard copies of the training were completed or the individual attended a training class, copies of the tests and/or roster showing the individual signed in must be kept on file as documentation for seven years.

## Assignments by Department/Course

Select By Department/Course to view the status of a training requirement for all members of a department.

Use the drop down arrows in each field to select the department and the course then click the Manage Training button.

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ITS CAMPUS RESOURCES TRAINING & CERTIFICATION

### Assignments by Department/Course

Use this page to manage training assignments.

Select the department and course you want to manage, and click the Manage Training button.

#### Search Form

department:  course:

Manage Training

The screen below will appear showing the name of the department and the training requirement selected followed by a list of all individuals in the department showing the deadline date and assigned by for everyone who has been assigned the requirement and the completed date and valid to date for all those who have completed the training.

## Management Resources

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ITS CAMPUS RESOURCES TRAINING & CERTIFICATION

### Assignments by Department/Course

Use this page to manage training assignments.

Select the department and course you want to manage, and click the Manage Training button.

#### Search Form

department:  course:

Manage Training

Manage Training Form - Academic Records - SAFETYASSESS 2012 RENEWAL

actions	name	deadline	assigned by	completed	valid to
	Breazeale, Barbara Anne	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	McLaughlin, Janet L	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	Myers, Monica				


trainees:

deadline date:


completed date:



Submit


## To assign the requirement to an individual

Click the  add new training icon in the actions column next to the individual's name. The trainee's name will appear below the list. Enter the deadline date (usually 15-30 days from the date assigned depending on the requirement and the urgency that it must be completed). Click the Submit button.


actions	name	deadline	assigned by	completed	valid to
	Breazeale, Barbara Anne	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	McLaughlin, Janet L	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	Myers, Monica				

trainees:  Myers, Monica





deadline date:   


completed date:  



## To assign the requirement to everyone on the list who has not already been assigned the requirement


Click the  add all icon at the top of the list (next to the name of the requirement).

Manage Training Form - Academic Records - ITSADDENDUM   

actions	name	deadline	assigned by	completed	valid to
 	Breazeale, Barbara Anne	03/30/2012	KCARLSON		
	McLaughlin, Janet L				
	Myers, Monica				



trainees: 


deadline date:   



completed date:  


The names of the trainees selected will appear below the list. Enter the deadline date then click Submit.

Manage Training Form - Academic Records - ITSADDENDUM   

actions	name	deadline	assigned by	completed	valid to
 	Breazeale, Barbara Anne	03/30/2012	KCARLSON		
	McLaughlin, Janet L				
	Myers, Monica				






trainees:  McLaughlin, Janet L; Myers, Monica


deadline date:   



completed date:  


Enter the deadline date then click the Submit button. The training is now assigned and the deadline date and assigned by fields entered.

Manage Training Form - Academic Records - ITSADDENDUM   

actions	name	deadline	assigned by	completed	valid to
 	Breazeale, Barbara Anne	03/30/2012	KCARLSON		
 	McLaughlin, Janet L	03/30/2012	KCARLSON		
 	Myers, Monica	03/30/2012	KCARLSON		

trainees: 

deadline date:   

completed date:  

## To delete a requirement you assigned in error

actions	name	deadline	assigned by	completed	valid to
	Breazeale, Barbara Anne	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	McLaughlin, Janet L	02/12/2012	SYSRENEW	01/18/2012	01/16/2013
	Myers, Monica	03/30/2012	KCARLSON		

Click the delete icon next to the individual (or the delete all icon at the top of the list next to the name of the requirement if marking everyone on the list complete).

Delete?

A pop up window will appear to confirm you want to delete, click OK.

**Note: You can only delete a requirement you have assigned.** Contact the Compliance Office or the Course Owner if a requirement has been assigned in error and should be removed.

## To mark the requirement complete

Click the edit icon next to the individual or the edit all icon at the top of the list (next to the name of the requirement) if marking everyone on the list complete.

Manage Training Form - Academic Records - ITSADDENDUM

actions	name	deadline	assigned by	completed	valid to
	Breazeale, Barbara Anne	03/30/2012	KCARLSON		
	McLaughlin, Janet L	03/30/2012	KCARLSON		
	Myers, Monica	03/30/2012	KCARLSON		

trainees:

Breazeale, Barbara Anne; McLaughlin, Janet L;  
Myers, Monica

deadline date:

03/30/2012; 03/30/2012; 03/30/2012

completed date:

03/19/2012



Submit

The names of the individuals to be updated will appear at the bottom of the list. Enter the completed date then click Submit. All selected records will be updated with the completed date and the valid to date.

Manage Training Form - Academic Records - ITSADDENDUM

actions	name	deadline	assigned by	completed	valid to
	Breazeale, Barbara Anne	03/30/2012	KCARLSON	03/19/2012	03/18/2013
	McLaughlin, Janet L	03/30/2012	KCARLSON	03/19/2012	03/18/2013
	Myers, Monica	03/30/2012	KCARLSON	03/19/2012	03/18/2013

trainees:

deadline date:



completed date:



Submit

**Note:** If hard copies of the training were completed or the individual attended a training class, copies of the tests and/or roster showing the individual signed in must be kept on file as documentation for seven years.

## DEADLINE EXCEPTIONS

When a person is unable to complete an assignment by the deadline date due to an approved absence (such as illness, military leave, out of country) a deadline exception may be granted. Deadline exceptions are not granted for excuses such as “too busy” or “didn’t have time to complete”.

Deadline exceptions can be process By Department/Course or By Name.

### Deadline Exceptions by Name

Select Deadline Exceptions by Name to process a deadline exception for an individual. As you begin typing the individual’s last name in the Name Search field, a directory will appear below showing the names and department for employees or the name and program for students that match your search.

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### Deadline Exceptions by Name

Use this page to manage training assignment deadlines.

Search for the person whose training you want to manage, select them from the list and click the Manage Training button.

**Name Search Form**

last name,first name:   selected person:

name	dept.	program
Amanda G Myers	Pediatrics House Officers	
Kyle Stephen Myers		MDM[3]
Lorraine Myers	MMI Cytogenetics	
Monica Myers	Academic Records	
Brianna Myers-Blair		PAM[1]

Click on the name to select the person that matches your search then click Manage Training.

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### Deadline Exceptions by Name

Use this page to manage training assignment deadlines.

Search for the person whose training you want to manage, select them from the list and click the Manage Training button.

**Name Search Form**

last name,first name:   selected person:



The screen below appears listing all requirements that have not been completed.

## Deadline Exceptions by Name

Use this page to manage training assignment deadlines.

Search for the person whose training you want to manage, select them from the list and click the Manage Training button.

### Name Search Form

last name, first name:

go

selected person: \*

Manage Training

### Manage Training Form - Monica Myers: Admin Bus Op Asst - Academic Records

actions	course	deadline	assigned by	completed	valid to
 	ITSADDENDUM	03/30/2012	KCARLSON		
 	BBP	01/26/2012	SYSTEMEMP		
	Statement of Understanding	01/26/2012	SYSTEMEMP		

course: \*


Please enter a valid date.

deadline date: \*




reason for change: \*

Submit

Click the  edit icon in front of each requirement you wish to extend the deadline for. Enter the new deadline date and the reason for the change. Click Submit.

### Manage Training Form - Monica Myers: Admin Bus Op Asst - Academic Records

actions	course	deadline	assigned by	completed	valid to
 	ITSADDENDUM	03/30/2012	KCARLSON		
	BBP	01/26/2012	SYSTEMEMP		
	Statement of Understanding	01/26/2012	SYSTEMEMP		

course: \*

BBP; Statement of Understanding

deadline date: \*



reason for change: \*

Submit

## Deadline Department/Course:

Select Deadline Exceptions by Department/Course to process a deadline exception for multiple individuals. Use the drop down arrows to select the Department and the Course.

### Deadline Exceptions by Department/Course

Use this page to manage training assignment deadlines.

Select the department and course you want to manage, and click the Manage Training button.

#### Search Form

department:  course:

Manage Training

#### Manage Training Form - Nursing Accelerated - West NE [0] - CITI

actions	name	deadline	assigned by	completed	valid to
	Howard, Kara Elise	05/31/2012	SYSTEMSTU1		
	Krumenacker, Sarah	05/31/2012	SYSTEMSTU1		
	Martin, Patricia K.	05/31/2012	SYSTEMSTU1		
	Moore, Janelle Elaine	05/31/2012	SYSTEMSTU1		
	Morgan, Brittany Suzanne	05/31/2012	SYSTEMSTU1		
	Neville, Stephen William	05/31/2012	SYSTEMSTU1		
	Powell, Jeffrey Lynn	05/31/2012	SYSTEMSTU1		
	Smith, Monica	05/31/2012	SYSTEMSTU1		
	Tousignant, Aubrey Jane	05/31/2012	SYSTEMSTU1		
	Vardell, Ava Marcell	05/31/2012	SYSTEMSTU1		

trainees: \*

deadline date: \*



reason for change: \*

Submit

Click the edit icon next to the individual(s) or the edit all icon at the top of the list (next to the name of the requirement) to select the individuals whose deadline you wish to extend.

The names selected will appear at the bottom of the screen. Enter the new deadline date and the reason for the change. Click Submit.

## Deadline Exceptions by Department/Course

Use this page to manage training assignment deadlines.

Select the department and course you want to manage, and click the Manage Training button.

### Search Form

department:

Nursing Accelerated - West NE [0]

course:

CITI

Manage Training

### Manage Training Form - Nursing Accelerated - West NE [0] - CITI

actions	name	deadline	assigned by	completed	valid to
	Howard, Kara Elise	05/31/2012	SYSTEMSTU1		
	Krumenacker, Sarah	05/31/2012	SYSTEMSTU1		
	Martin, Patricia K.	05/31/2012	SYSTEMSTU1		
	Moore, Janelle Elaine	05/31/2012	SYSTEMSTU1		
	Morgan, Brittany Suzanne	05/31/2012	SYSTEMSTU1		
	Neville, Stephen William	05/31/2012	SYSTEMSTU1		
	Powell, Jeffrey Lynn	05/31/2012	SYSTEMSTU1		
	Smith, Monica	05/31/2012	SYSTEMSTU1		
	Tousignant, Aubrey Jane	05/31/2012	SYSTEMSTU1		
	Vardell, Ava Marcell	05/31/2012	SYSTEMSTU1		

trainees:

Howard, Kara Elise; Krumenacker, Sarah; Martin, Patricia K.; Moore, Janelle Elaine; Morgan, Brittany Suzanne; Neville, Stephen William; Powell, Jeffrey Lynn; Smith, Monica; Tousignant, Aubrey Jane; Vardell, Ava Marcell

deadline date:

09/22/2012



reason for change:

Enrolled for Fall 2012 Semester

Submit

## Key

Required Field

Add new training or Add all

Edit or Edit all

Delete

Switch to exempt

Reset Form

## REPORTS

### Certificates for Coordinators

Coordinators can print a certificate displaying selected compliance requirements for any person they have authorization for. Begin typing the individual's name in the Name Search field then select the person that matches your search. Click the Choose Training button.



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### Certificates

Use this page to print training certificates.

Search for the person whose certificates you want to print, select them from the list and click the Choose Training button.

**Name Search Form**

last name, first name:   selected person:

A list of all training that is currently valid will appear. Click the boxes to check the requirements to be included on the certificate then click Print.



**Print Certificates Form - Matthew S Callaway: Programmer/Analyst L2 - ITS Application Services**

courses:

- Bloodborne Pathogen Exempt
- Bloodborne Pathogen Exempt 2012 Renewal
- HIPAA
- ITS Addendum Initial & Renewal 2012
- Safety Competency Assessment 2012 Renewal
- Statement of Understanding 2012 Renewal
- UNMC Cultural Competency 2012

The certificate of completion is displayed. You can save or print the certificate.



## Compliance Due Report – Coordinators

Department Compliance Training Coordinators are responsible for notifying individuals in their area(s) when they have compliance due. The Compliance Due Report should be run at least twice each month (1) when notified by the compliance office that renewals have been assigned and (2) mid-month to remind individuals who have not yet completed the training. The goal is to have everyone complete their assigned training by the due date given. See UNMC Compliance Program Policy 8000.

The Compliance Due Report allows coordinators to preview a report showing All Types of training that is outstanding or a report based on category due - Initial Notification, Mid-Period Reminder, Overdue 1-30 Days, Overdue 31-60 Days, or Overdue 61+ Days.

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## Compliance Due Report for Coordinators

Use this page to send training reminder emails.

Click the check boxes if you wish to send supervisors a copy of e-mail notices to employees who are 1-30 days overdue, 31-60 days overdue, and/or 61 days overdue.

Select a reminder type and click the Preview Training button.

#### Search Form

reminder type:

All Types  
 All Types  
 Initial Notification  
 Mid-Period Reminder  
 Overdue 1-30 Days  
 Overdue 31-60 Days  
 Overdue 61+ Days

CC 1-30 overdue  
 CC 31-60 overdue  
 CC 61+ overdue

Department training coordinators can choose to send supervisors a copy of the over due e-mail notices by clicking the appropriate check box(es) CC 1-30 overdue, CC 31-60 overdue and or CC 61+ overdue.

After completing selections, click Preview Training to review the report. The report can be sorted by name, by department, by course, etc. by clicking on the column header.

Exception Report

action	name	department	course	extension date	extension reason	reminder type
	Robinson, Margaret	Academic Affairs	SAFETYASSESS 2012 RENEWAL			Overdue 1-30 Days
	Pope, Susan	Academic Affairs Office, COM	Statement 2012 Renewal			Overdue 1-30 Days
	Rogers, Geraldine	Academic Affairs Office, COM	SAFETYASSESS 2012 RENEWAL			Overdue 1-30 Days
	Rogers, Geraldine	Academic Affairs Office, COM	Statement 2012 Renewal			Overdue 1-30 Days

excluded trainees:

Click the remove from e-mail list icon in front of the name if you do not want to send that person an e-mail. A pop up window will appear to confirm you wish to remove the person from the e-mail list. Click OK if you wish to remove or Cancel if you selected in error.

After reviewing the report, click the Send Emails button. A report listing all individuals who were sent e-mails will be displayed.

## Compliance Due Report: Emails Sent

Sending Emails finished

Status Email Sent

name	department	course	reminder type	status
Cechin, Tuire	Pathology/Microbiology, COM	IACLIC	Overdue 61+ Days	Email Sent

Individuals will receive an e-mail listing the requirements due, the due date and instructions for logging into Blackboard to complete the training (see sample below).

To: Carlson, Kathy

Cc:

Subject: Compliance Training Renewal \*\*ACTION REQUIRED\*\*

You have been assigned the following mandatory compliance training requirements. Please follow the instructions below to complete your outstanding compliance training requirements.

**OUTSTANDING TRAINING REQUIREMENTS:**

SAFETYASSESS 2012 RENEWAL - Due: 04/15/2012

BBP 2012 Renewal - Due: 04/15/2012

Cultural Competency 2012 - Due: 04/15/2012

Statement 2012 Renewal - Due: 04/15/2012

**INSTRUCTIONS:**

- 1) From a web browser, log into BlackBoard at: <http://my.unmc.edu>
- 2) Once logged into Blackboard, click on the Courses tab (next to the My UNMC tab towards the top of the page).
- 3) Click on the course name and follow the instructions to view the course material and complete the appropriate test.
- 4) Remember to click Save and Submit to finalize your test.

Should you have any questions or problems, please contact me. Thank you in advance for your cooperation.

Training coordinators will also receive an e-mail listing the name and type of reminder sent out for each person notified and the e-mail address of the supervisor if selected to receive a copy of the e-mail (see sample below).

**From:** KCARLSON@unmc.edu [mailto:KCARLSON@unmc.edu]

**Sent:** Monday, March 26, 2012 12:50 PM

**To:** Carlson, Kathy

**Subject:** Compliance Training Email Reminders Sent

Reminder emails sent to the following:

[KCARLSON@unmc.edu](mailto:KCARLSON@unmc.edu), CC: [kcoutts@unmc.edu](mailto:kcoutts@unmc.edu) - Past 60 Days

BBP - Due: 01/20/2012

SAFETYASSESS - Due: 01/20/2012

Statement of Understanding - Due: 01/20/2012

Cultural Competency - Due: 01/20/2012

# Status Report for Coordinators

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### Status Report for Coordinators

Select a course from the dropdown list, apply any filters, and click the Generate Report button to view the report in Excel.

#### Course Search Form

course:	<input type="text" value="All Courses"/>	assigned before:	<input type="text"/>
deadline after:	<input type="text"/>	deadline before:	<input type="text"/>
completed date before:	<input type="text"/>	<input type="checkbox"/> show only incomplete	
		<input type="checkbox"/> include archived data	
<input type="button" value="Generate Report"/>			