



# Training Records Explained



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### Training Page Explained

Keeping track of Training and Certificate updates and renewals for each Caregiver can be complicated. Both the Caregiver and the Manager can easily keep on top of deadlines and expiration dates on the **Training Page**. Here you will find all training details. You can easily see what is complete or what is missing.

With alerts, you will be reminded in advance when a certificate is set to expire, giving you enough notice to schedule a renewal.

Adding Training records to Carer profiles also makes it easy for Managers and Admins to see who is up-to-date and who is compatible for Clients requiring certain types of work.

It's simple to add a training record, so **Let's Get Started**.

### Benefits of the Training Page

- ✓ Organize Training Documents
- ✓ Set Review or Expiry
- ✓ Reminders

## 2 Adding a Training Record

### Finding and Editing the Training Page

### Find Training Records on Your Profile

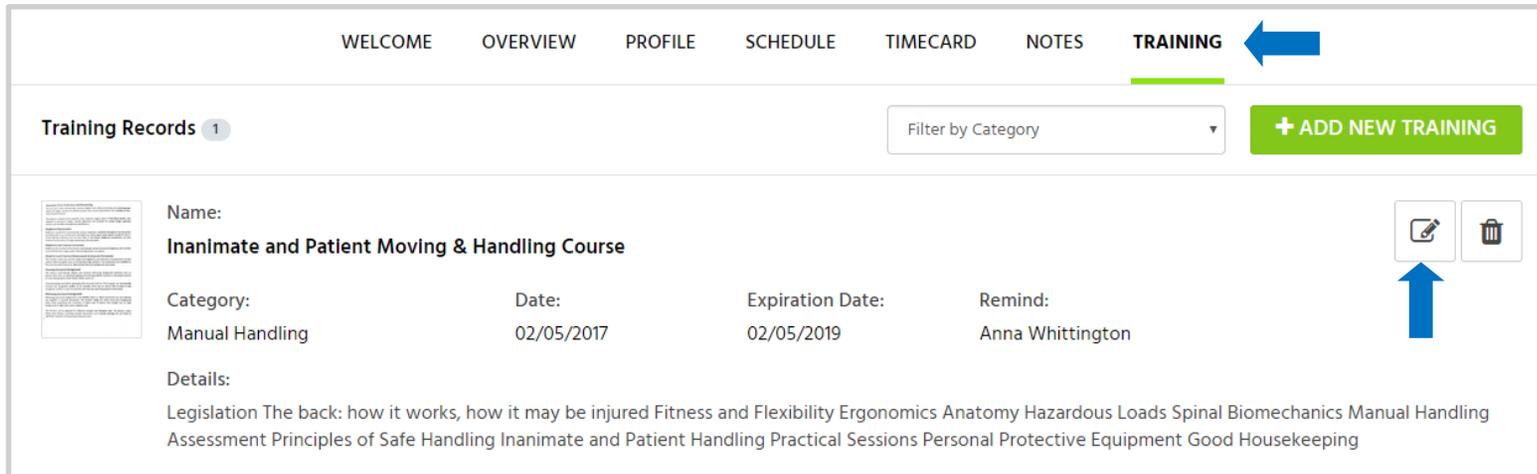
Navigate to your **Profile** and then **Training**. Browse the list or use the dropdown menu to **Filter by Category**.

### Edit or Remove an Existing Training Record

Need to make a change to an existing Training record? Click on  and edit the text as necessary.

When finished select Save Training.

To Delete a Training record from your profile, select  and then choose Yes, Delete it!



WELCOME OVERVIEW PROFILE SCHEDULE TIMECARD NOTES **TRAINING**

Training Records 1 Filter by Category + ADD NEW TRAINING

 Name: **Inanimate and Patient Moving & Handling Course**  

Category: Manual Handling Date: 02/05/2017 Expiration Date: 02/05/2019 Remind: Anna Whittington

Details:  
Legislation The back: how it works, how it may be injured Fitness and Flexibility Ergonomics Anatomy Hazardous Loads Spinal Biomechanics Manual Handling Assessment Principles of Safe Handling Inanimate and Patient Handling Practical Sessions Personal Protective Equipment Good Housekeeping

### 3 Adding a Training Record

#### Add New Training



### Adding a New Training Record

Have a new training record or certificate to add? Start by clicking on **+Add New Training**

- Type in the **Name of the Training** and choose a **Category** from the dropdown menu.
- Type the date or use the calendar to add the **Date** of completion and **Expiration date**.
- Type in Details related to the training

To add **Documents** like a certificate, select **+Attach File** and choose a file from your computer. Click **Open**. When finished, select **+Save Training**.

The screenshot shows a web form titled "Add new Training". It contains several input fields and dropdown menus. The "Name of training" field is filled with "Inanimate and Patient Moving & Handling". The "Category" dropdown is set to "Manual Handling". The "Date" field is "02/05/2017" and the "Expiration Date" field is "02/01/2019". The "Details" section contains a text area with the following content: "Course Content: Legislation, The back: how it works, how it may be injured, Fitness and Flexibility, Ergonomics". The "Send reminder to" dropdown is set to "Mary Casey" and the "Send reminder" dropdown is set to "Month before Expiration Date". A blue arrow points to the "Send reminder to" dropdown. At the bottom left, there is an "Attach File" button with a blue arrow pointing to it. At the bottom right, there is a "SAVE TRAINING" button.

If you wish, **Set an Alert** to remind you or a Manager when the certificate will expire. Select **+Add new Alert**. Then choose the alert recipient's **Name** from the dropdown menu and when to send the alert.

**Want to remind more than one person?** Simply select **+Add New Alert** again and add another person.