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Green boxes are new/revised descriptions.

Arrows are new/revised features.

Training Calendar User Guide
Training Sponsor/Organization and Instructors

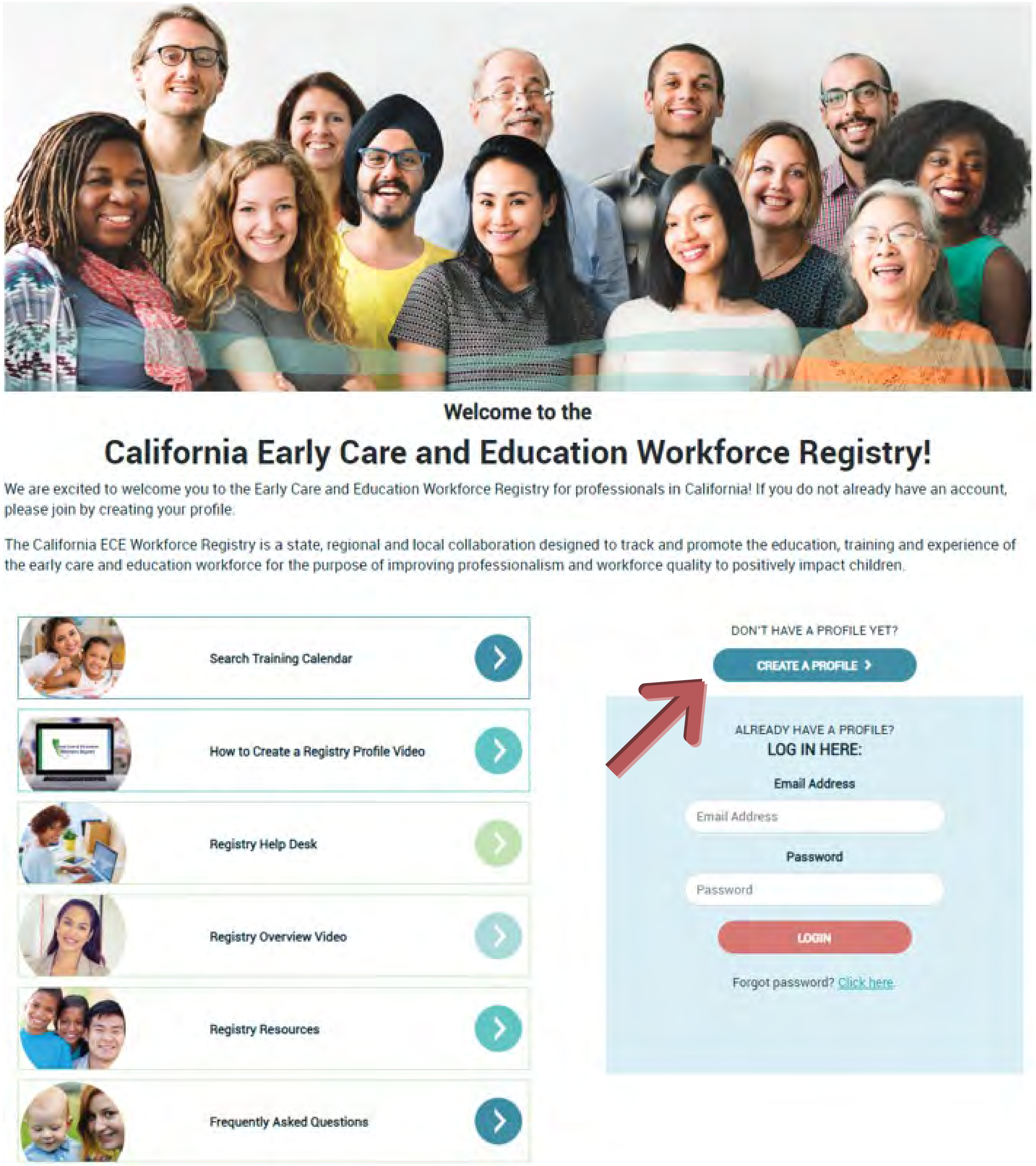
The CA ECE Workforce Training Module is comprised of four components, the Training Sponsor/Organization, Instructor, Training Calendar, and Registry Participant components. All four components work together to create the Training Module.

The Registry's Training Calendar Module is designed to allow sponsor organizations and their training instructors the ability to post and manage training events, the training enrollment process, and the payment process, as well as post completed trainings directly to participant's profiles, and generate reports all in one place. To access the Training Calendar Module or any other Registry feature, one must have an active individual Registry profile; this includes the sponsor contact person, additional sponsor managers, instructors, and participants searching for available trainings. The following step-by-step instructions are for approved sponsor organizations and their training instructors.

1. Training Sponsor/Organization

The CA ECE Workforce Registry is responsible for approving all sponsor organizations. To request Training Sponsor access, please see the online *Training Calendar Module* Interim Policy and *Applications*. This component of the Registry is available to training vendors funded by First 5 California and California Department of Education (CDE) Early Learning and Care Division (ELCD), this includes Referral (R&R) agencies, California Preschool Instructional Network (CPIN), and WestEd Program for Infant Toddler Care (PITC), among others. Locally funded training organizations may also gain access to the Training Calendar Module, with the approval of the funding agency, please contact the Registry with questions.

The Training Calendar Module Application must be submitted by the Executive Director, or equivalent and include the identification of a Contact Person, unless the Executive Director will be entering training data into the Registry. Once a training/sponsor organization has submitted their application, and has been approved, the primary Contact Person will have Training Sponsor Tools available upon login to manage the Training Calendar Module for the approved organization. The contact person ***must*** have an active Registry profile to access the Training Calendar Module.



1.1. Contact Person/Managers

Each Training/Sponsor Agency must have at least one designated primary contact person included in the Application, unless the Executive Director will be adding, editing, and /or removing trainings for the organization. The contact person must have an active Registry profile to access the Training Sponsor Tools.

- To create a profile, go to www.caregistry.org and click *"Create Profile"* and complete the registration process. An email address is required and will serve as the username upon login.

- Once the contact person has completed the registration process and has an active profile, and is approved, he/she/they will have access to the **Training Sponsor Tools.**

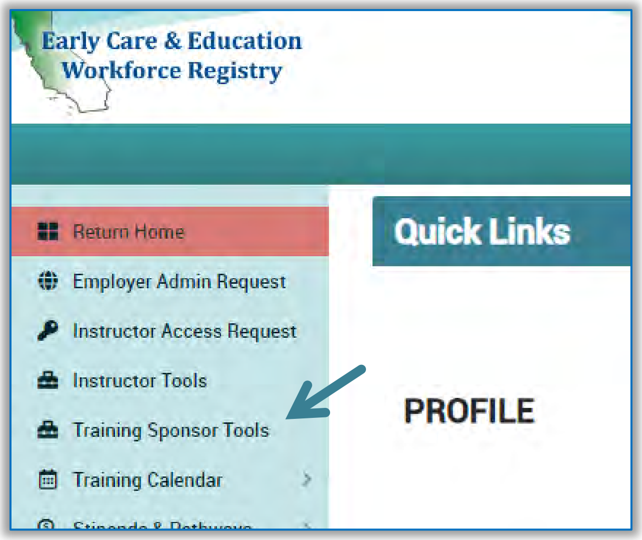
- If the **Contact Person/Manager** is also a trainer, an **Instructor Access Request** will also need to be submitted to access the **Training Calendar Instructor Tools**. See 2.2 and 2.3. or the Training Sponsor Contact Manager can add the Instructor on **Instructor Management.**

NOTE: The contact person and sponsor managers should use their work email address in the Registry for the Training Module and their daytime phone number in their profile should be their business phone.

1.1.1. Training Sponsor Tools

When the contact person logs-in to his/her/their profile, the Home Screen will appear. To access the **Training Sponsor Tools**, click the link in the navigation bar to the left of the screen.

Upon clicking the **Training Sponsor Tools** link, the following screen will appear, listing the tools available.



1.1.2. Training Sponsor/Organization Information

The primary Contact Person should ensure that the data in **Training Sponsor Information** section (the first link on the Training Sponsor Tools menu) is up to date. This information can be edited at any time.

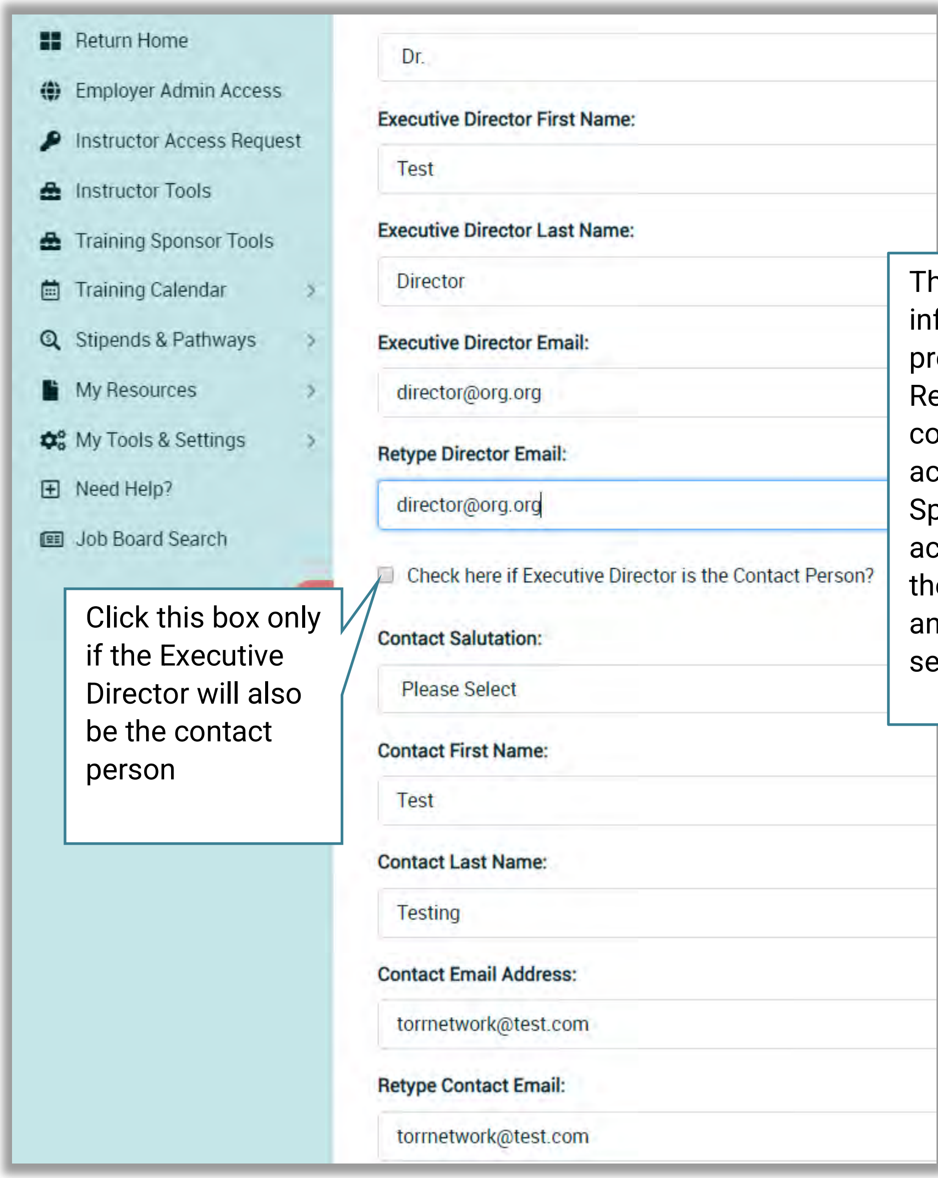
Note: Fields that have an asterisk (*) are required fields and cannot be left blank.

The Executive Director information AND the contact person information will already be prepopulated by the Registry for the contact person to gain access to the Training Sponsor Tools. The contact person will have the ability to make changes and/or assign additional sponsor managers once access has been gained.

- The first name, last name, and email address of the Executive Director is entered in the top portion of the Training Sponsor Information section, whether or not the Executive Director is the **Contact Person**.
  - If the Executive Director will also be the contact person, click the box to indicate this status.
  - If the contact person is different from the Executive Director, do not check the box and manually type in the contact person's information.

Note: While it is not required for the Executive Director to have a Registry profile, it is strongly recommended especially if the Executive Director is also the Contact Person and counted in a QRIS rating.

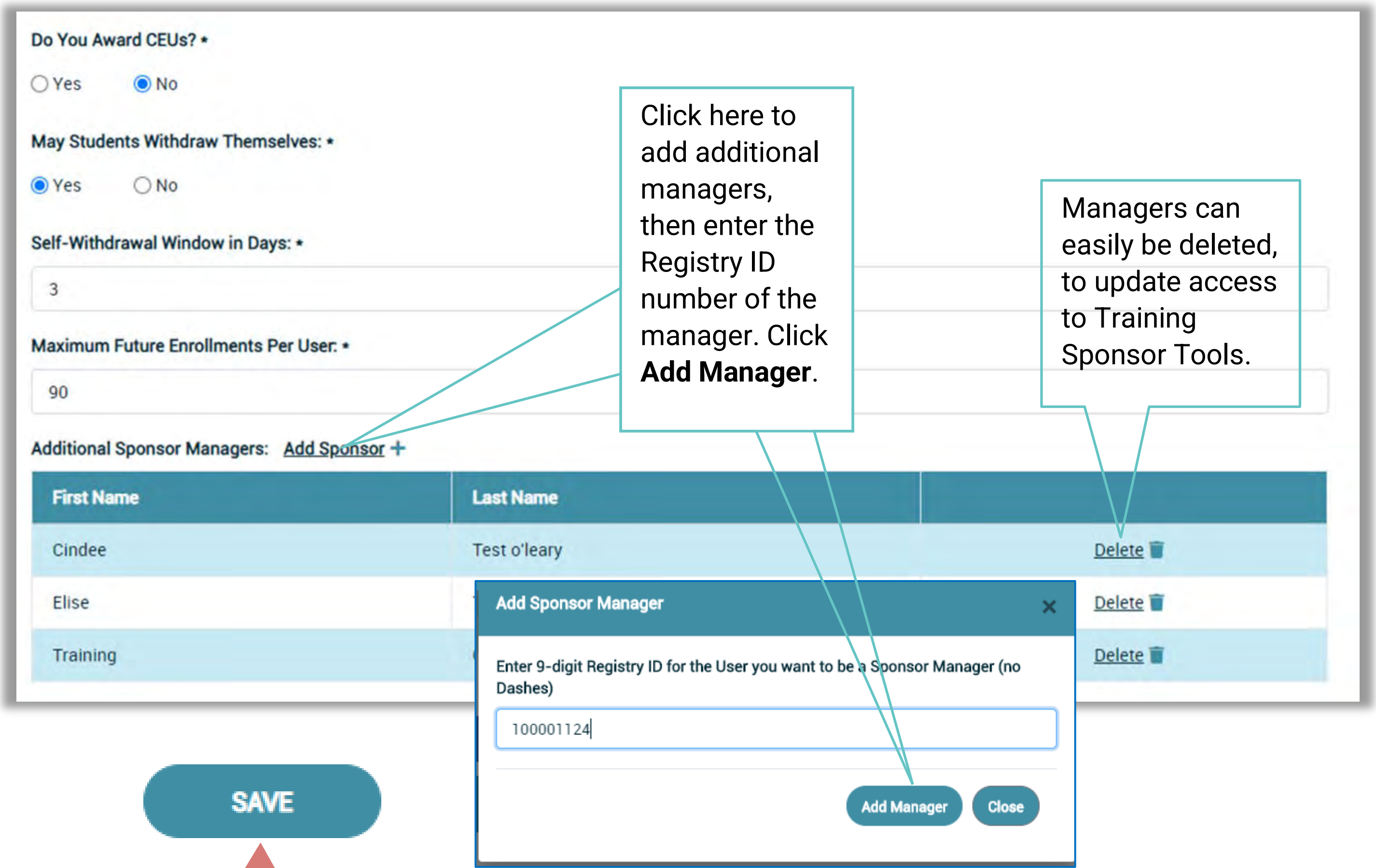
- **Do You Award CEU's?**: If the training organization offers continuing education units (CEUs), click **Yes**. Otherwise, default is **No**.
- **Self-Withdrawal Window in Days**:
  - If a training participant can self-withdraw, or unregister themselves from a training, click **Yes** and enter the number of days prior to the training the student will be able to self-withdraw (must be 1 or more). If a 3-day window is entered, the student will not be able to withdraw 2 days or less prior to the training. The student will have to contact the sponsor to withdraw.
  - If a student is not allowed to self-withdraw, click **No** and the student will have to contact the sponsor to withdraw.
- **Maximum Future Enrollments per User**: 99 is the maximum number. This will limit the number of trainings that participants can take with your organization.
- **Additional Sponsor Managers**: The contact/sponsor managers can assign additional sponsor managers that will have the same access to the Training Sponsor Tools as the contact person.
  - The additional managers MUST have a Registry profile.
  - The contact/sponsor managers can click the **Add Sponsor** and **Add Manager**.
- **CDE/F5CA Program Codes**: For programs reporting to CDSS/CDE/F5CA using the Direct Service Profile Report, program codes can be assigned. Contact the Registry to have codes added or edited.



Click this box only if the Executive Director will also be the contact person

This portion of the information page will be prepopulated by the Registry in order for the contact person to gain access to the Training Sponsor Tools. After access has been approved, the contact person can edit and make changes to this section at any time.

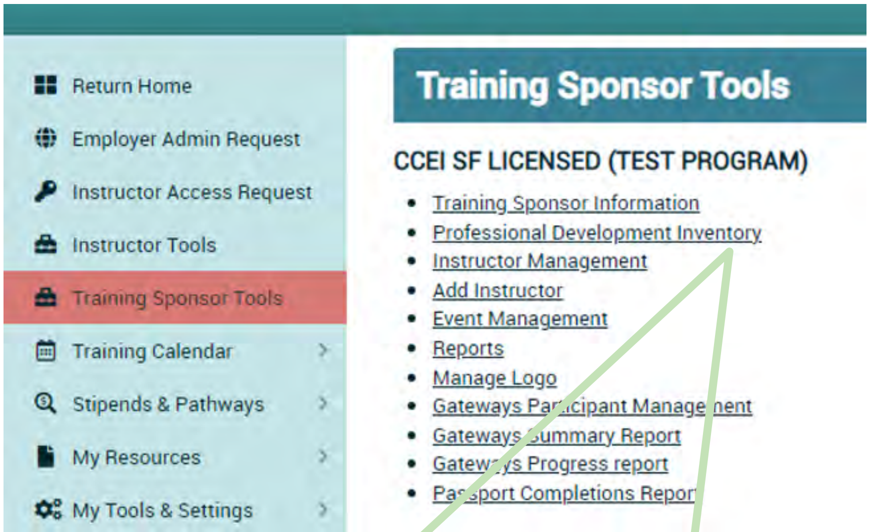
- The Registry ID number of the additional manager must be entered, then click **Add Manager**.
- To remove a manager, click the **Delete** link next to the additional manager's name.



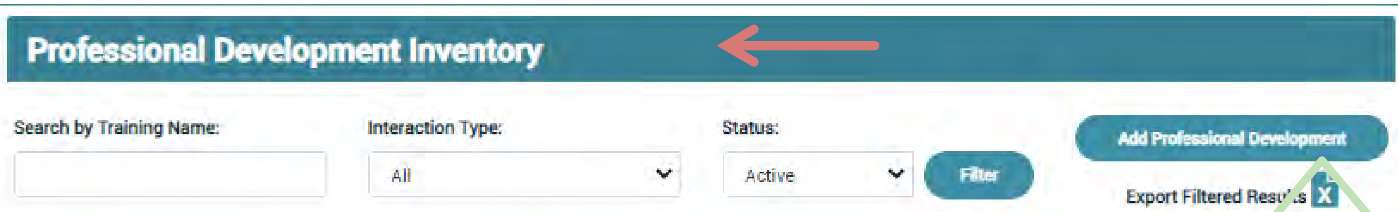
If you are making updates to Sponsor Information, click **Save**.

1.1.3. Add to Professional Development Inventory

This function allows **Primary Contact Person/Contact Managers** of approved **Training Organizations/Sponsors** to develop an inventory, or "catalogue," of trainings or Professional Development experiences like college course catalogues. All Interaction types must be added prior to posting them to the event calendar.

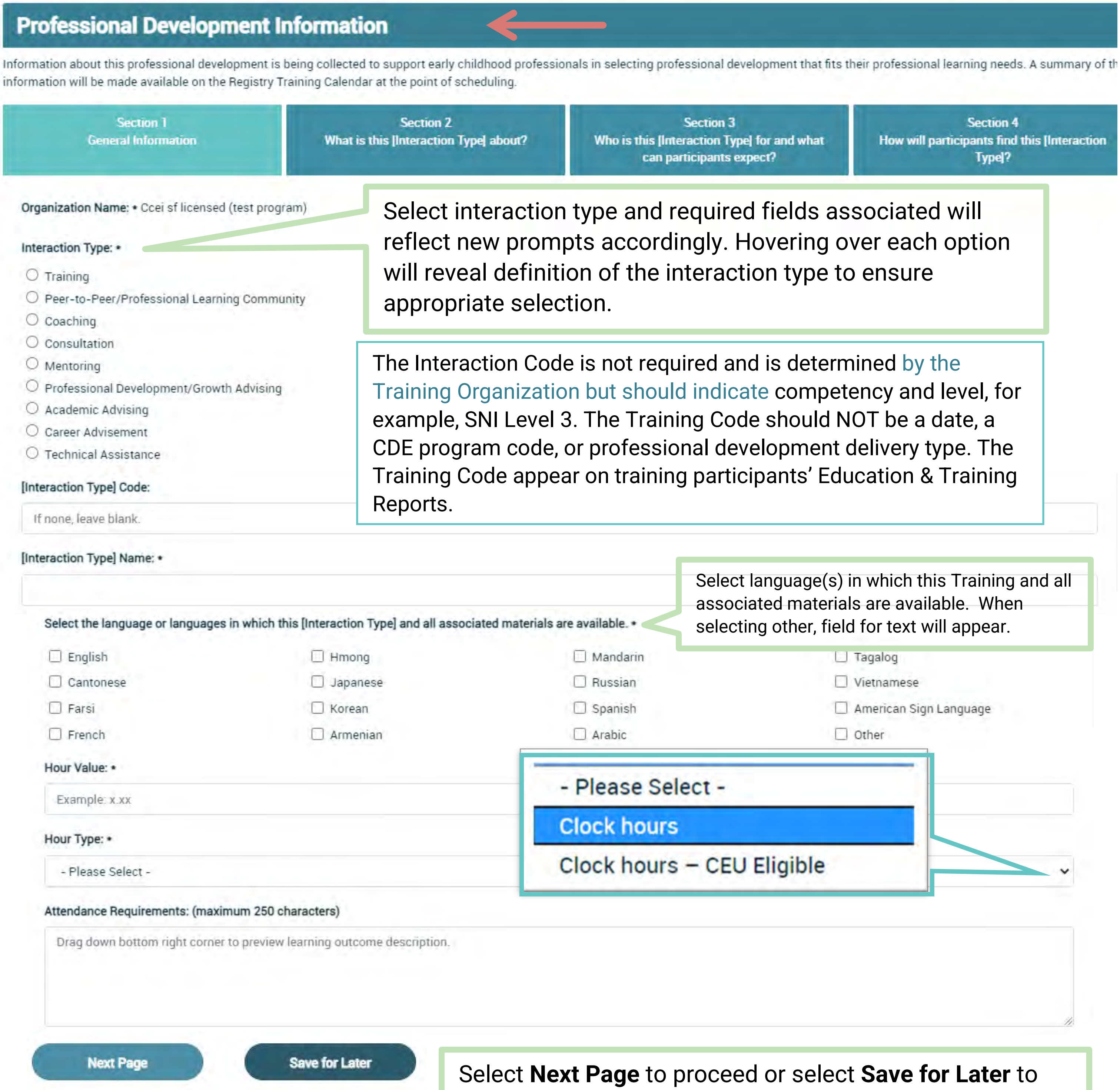


To add or edit interaction inventory, click **Professional Development Inventory** in the **Training Sponsor Tools.**



In the **Professional Development Inventory**, select **Add Professional Development.**

The next three pages show the **Add Training** fields:



Select interaction type and required fields associated will reflect new prompts accordingly. Hovering over each option will reveal definition of the interaction type to ensure appropriate selection.

The Interaction Code is not required and is determined by the Training Organization but should indicate competency and level, for example, SNI Level 3. The Training Code should NOT be a date, a CDE program code, or professional development delivery type. The Training Code appear on training participants' Education & Training Reports.

Select language(s) in which this Training and all associated materials are available. When selecting other, field for text will appear.

Select **Next Page** to proceed or select **Save for Later** to pause for completing at a later opportunity.

Selecting interaction type **Training** will prompt additional fields for completion.

Is this a Train the Trainer course? * Yes No

Does this training lead to a certification? * Yes No

Does the certification expire? * Yes No

How long is the certification valid? * Year(s) 2 Month(s) 0

Next Page Save Changes

Selecting that Certification will expire will generate an email notice to Registry participant 30 days before the certification expires and the training will be removed from the participants' Education & Training Report.

The next tab will require information about the training and the selections will determine what fields are required to be completed.

Professional Development Information

Information about this professional development is being collected to support early childhood professionals in selecting professional development that fits their professional learning needs. A summary of this information will be made available on the Registry Training Calendar at the point of scheduling.

Section 1 General Information	Section 2 What is this training about?	Section 3 Who is this training for and what can participants expect?	Section 4 How will participants find this training?

Training Name: Group Training

Is this training focused on principles and practices for working directly with young children? *

Yes No

Selecting **No** will not prompt additional fields for required completion.

Description: (maximum characters 1000) *

Drag down bottom right corner to preview Description

Select the focus of the curriculum. *

- Infant Care (birth - 18 months)
- Toddler Care (19 - 36 months)
- Preschool (3 - 5 years)
- Transitional Kindergarten (4 - 5 years)
- School Age/Elementary (kindergarten - sixth grade)
- After-School/Out-of-School Time
- Parents/Families
- Adults in the field

Selecting **Infant or Toddler Care** will prompt additional fields for required completion. Selecting **Preschool or Transitional Kindergarten** will prompt additional fields for required completion.

Previous Page Next Page Save for Later

Training Name: Group Training

Is this training focused on principles and practices for working directly with young children? •

- [x] Yes
- [ ] No

Selecting **Yes** will prompt additional fields related to breadth and depth will be required to complete. More information on the meaning of breadth and depth are described by using the information icon.

Select the term that best describes the breadth and depth of this training. • *This information can support potential participants in deciding if the training is a good fit for them based on their knowledge, experience, and level of familiarity with the content being explored.*

Terms that describe breadth and depth:

- [ ] Overview/introductory
- [ ] In-Depth
- [ ] Advanced

Description: (maximum characters 1000) •

Select the focus of the training curriculum. •

- [x] Infant Care (birth - 18 months)
- [ ] Toddler Care (19 - 36 months)
- [x] Preschool (3 - 5 years)
- [ ] Transitional Kindergarten (4 - 5 years)
- [ ] School Age/Elementary (kindergarten - sixth grade)
- [ ] After-School/Out-of-School Time
- [ ] Parents/Families
- [ ] Adults in the field

Select the key domains from the California Infant/Toddler Learning and Development Foundations addressed. • *Select only those that specifically apply.*

- [ ] Social-Emotional Development
- [ ] Language Development
- [ ] Cognitive Development
- [ ] Perceptual and Motor Development
- [ ] Not applicable to training content
- [ ] I am not familiar with the California Infant/Toddler Learning and Development Foundations

Selecting **Infant or Toddler Care** will prompt additional fields California Infant/Toddler Learning and Development Foundations addressed required for completion. Selecting **Preschool or Transitional Kindergarten** will prompt additional fields for California Preschool Learning and Development Foundations addressed required for completion.

Select the key domains and strands from the California Preschool Learning Foundations addressed. • *Select only those that specifically apply.*

Social-Emotional Development
- [ ] Self
- [ ] Social Interaction
- [ ] Relationships

Language and Literacy
- [ ] Listening and Speaking
- [ ] Reading
- [ ] Writing

English-Language Development
- [ ] Listening
- [ ] Speaking
- [ ] Reading
- [ ] Writing

Mathematics
- [ ] Measurement
- [ ] Geometry
- [ ] Mathematical Reasoning
- [ ] Number Sense
- [ ] Algebra and Functions

Visual and Performing Arts
- [ ] Visual Art
- [ ] Music
- [ ] Drama
- [ ] Dance

Physical Development
- [ ] Fundamental Movement Skills
- [ ] Perceptual-Motor Skills and Movement Concepts
- [ ] Active Physical Play

Health
- [ ] Health Habits
- [ ] Safety
- [ ] Nutrition

History-Social Science
- [ ] Self and Society
- [ ] Becoming a Preschool Community Member
- [ ] Sense of Time
- [ ] Sense of Place
- [ ] Marketplace

Science
- [ ] Scientific Inquiry
- [ ] Life Sciences
- [ ] Earth Sciences
- [ ] Physical Sciences

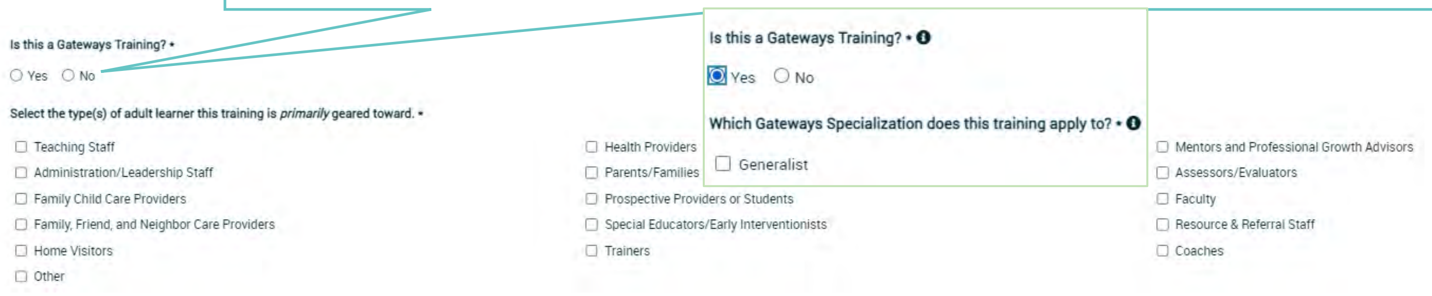
- [ ] Not applicable to training content
- [ ] I am not familiar with the California Preschool Learning Foundations

Previous Page | Next Page | Save for Later

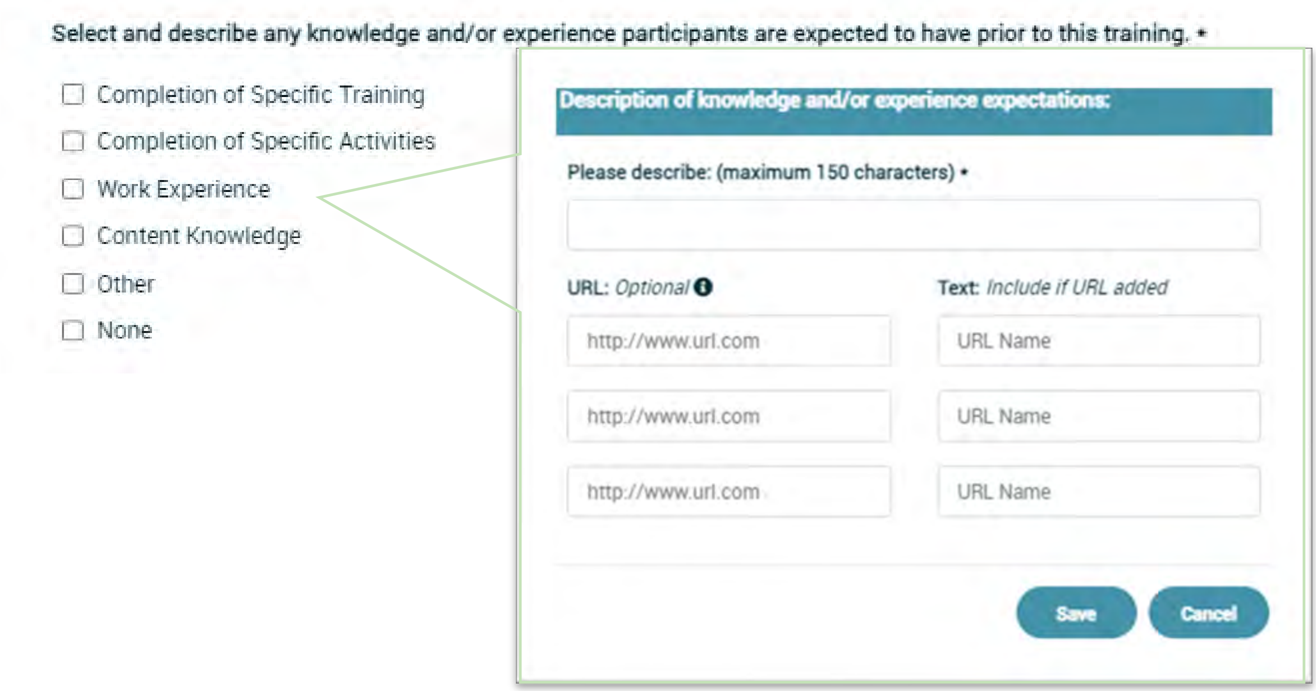
Select **Next Page** to proceed or select **Save for Later** to pause for completing at a later opportunity. Select **Previous Page** to review information already submitted.

The Next Page will have prompts relating to who the training is for and what participants can expect during the experiences.

Gateways? Selection will determine the next fields to complete to proceed. **No** response is default. **Yes** options will prompt an additional response, but the only selection is Generalist.



Next, select and describe any knowledge and/or experience participants are expected to have prior to this training. When selecting any of the menu options, a window will open to describe knowledge, experience or other prerequisites participants will need to complete. Links to content may also be included to provide participants in preparation for the training.



The next section addresses what participants will know and be able to do after completing the training. You will need to identify the competency area(s) from the California Early Childhood Educator (ECE) Competencies addressed and write the learning outcome(s) related to the competency area(s) selected.

What will participants know and be able to do after completing this training?

The California ECE Competencies are professional standards developed to inform professional development learning outcomes for California's early childhood workforce. Learning outcomes describe the specific, measurable expectations of what learners will know and be able to do after completing a training. You will be asked to identify learning outcomes related to the competency area(s) you select. Visit the QCC website for resources on developing learning outcomes.

Select the primary competency area from the California Early Childhood Educator (ECE) Competencies addressed through this training. *

Primary Competency Area: *

- Please Select -

Select the main competency area(s) from the California Early Childhood Educator (ECE) Competencies addressed and write the learning outcome(s) related to this competency area.

- ☐ Child Development and Learning
- ☐ Culture, Diversity, and Equity
- ☐ Relationships, Interactions, and Guidance
- ☐ Family and Community Engagement
- ☐ Dual-Language Development
- ☐ Observation, Screening, Assessment, and Documentation
- ☐ Special Needs and Inclusion
- ☐ Learning Environments and Curriculum
- ☐ Health, Safety, and Nutrition
- ☐ Leadership in Early Childhood Education
- ☐ Professionalism
- ☐ Administration and Supervision

Drop down menu will allow you to select a Primary Competency Area which will automatically check it in the section below. A new field will appear to complete with the learning outcomes associated with the selected competency. Additional competencies can be selected, but additional learning outcomes will be required as well.

Competency Primary Core Knowledge Area: *

- Please Select -

- Please Select -
Child Development and Learning
Culture, Diversity and Equity
Relationship, Interactions and Guidance
Family and Community Engagement
Dual Language Development
Observation, Screening, Assessment and Documentation
Special Needs and Inclusion
Learning Environments and Curriculum
Health, Safety and Nutrition
Leadership in Early Childhood Education
Professionalism
Administration and Supervision

Write the learning outcome(s) related to this competency area, you selected. At least one is recommended.

Professionalism

Example 1: Participants will recognize the signs of work-related stress and burnout.
Example 2: Participants will connect current practices to evidence-based practices that promote positive outcomes for children.

Drag down bottom right corner to preview learning outcome Description.

Select the Competency Area(s) as indicated in the previous section and specify the percentage of each area that this training contains. Total percentage must add up to 100%.

Has this training been mapped using the ECE Competencies mapping tool ECE Mapping Tool | Child Development Training Consortium? *

- (●) Yes
- ( ) No

If the training has not been mapped to the competencies leave **NO** as selection.

These are the Competency Area(s) from above. Specify the percentage of each area that this training contains. Total percentage must add up to 100%.

%

- ☐ Child Development and Learning
- ☐ Special Needs and Inclusion
- ☐ Culture, Diversity, and Equity
- ☐ Learning Environments and Curriculum
- ☐ Relationships, Interactions, and Guidance
- ☐ Health, Safety, and Nutrition
- ☐ Family and Community Engagement
- ☐ Leadership in Early Childhood Education
- ☐ Dual-Language Development
- ☐ Professionalism
- ☐ Observation, Screening, Assessment, and Documentation
- ☐ Administration and Supervision

Total Percentage

Provide the assessments used before or during the training to describe how the participant learning outcomes were met.

How will you know if the participant learning outcomes were met? *(Visit the QCC website for resources on assessing participant learning outcomes.)*

Assessments used *before* or *during* this training: *

- ☐ Performance-Based Activity (e.g., informal observation, demonstration of knowledge or skills, delivery of a lesson plan)
- ☐ Survey or Poll
- ☐ Quiz
- ☐ KWL [Know, Want, Learned] Chart
- ☐ Self-Assessment
- ☐ Discussion
- ☐ Other
- ☐ None

Provide the assessments used at the end or after the training to describe how the participant learning outcomes were met. Reponses in this section will support planning of professional development opportunities for trainers and will not be shared on the event details page.

Assessments used *at the end of* or *after* this training: *

- ☐ Performance-Based Activity (e.g., informal observation, demonstration of knowledge or skills, delivery of a lesson plan)
- ☐ Survey or Poll
- ☐ Quiz or Test
- ☐ Self-Assessment
- ☐ Exit Ticket
- ☐ Action Plan
- ☐ Other
- ☐ None

Select the types of experiences the training will provide to participants. Multiple options can be selected. There are two sections to complete: what a trainer will provide and learning activities.

What will participants experience during this training?

The trainer will provide: *

- ☐ Oral presentation
- ☐ Video presentation
- ☐ Handouts
- ☐ Real-world and relevant scenarios and examples
- ☐ Demonstration of content, skills, andki9 strategies
- ☐ Content customized based on information gathered prior to the training about the knowledge, skills, and experiences of participants
- ☐ Opportunities for participants to process and make meaning of information presented
- ☐ Content designed for joint participation by early care and education staff and owners or administrators
- ☐ Other

Select the types of learning activities the training will provide to participants. Multiple options can be selected.

Learning Activities: *

- ☐ Reflect on existing knowledge, skills, and experiences.
- ☐ Share knowledge, skills, and experiences with other participants.
- ☐ Build on and connect new learning to prior knowledge, skills, and experiences.
- ☐ Complete independent activities (e.g., readings, writing assignments).
- ☐ Engage in small group discussions mkor activities.
- ☐ Make choices about how to participate in interactive experiences.
- ☐ Practice applying key concepts during the training.
- ☐ Engage in action planning or goal setting.
- ☐ Other

The final portion of the page is to provide information on types of supports that will be available to participants after the completion of the training event.

What type(s) of support will be available after this training?

Supports available after this training: *

- ☐ Continued sharing of resources (e.g., via phone or email, through a website)
- ☐ Meetings or discussions either in person or online (e.g., communities of practices)
- ☐ Individualized contact between the trainer and participants, such as via phone or email
- ☐ Technical assistance (e.g., coaching, mentoring, consultation, peer-to-peer coaching)
- ☐ Materials to encourage on-going implementation support by owners or administrators
- ☐ Other
- ☐ None

Previous Page | Next Page | Save for Later

Select **Next Page** to proceed or select **Save for Later** to pause for completing at a later opportunity. Select **Previous Page** to review information already submitted.

The final page to complete is related about additional topics related to CDSS, Health and Safety Area, and Observation and Assessment Tools.

Is the training related to or about the following topic or topics

CDSS Topics:

- [ ] Implicit Bias/Anti-Bias/Anti-Racist
- [ ] Dual Language Learner
- [ ] Trauma Informed
- [ ] Full Inclusion
- [ ] Center on the Social and Emotional Foundations of Early Learning (CSEFEL)
- [ ] Curriculum and Instructional Models Training

Health and Safety Areas:

- [ ] Child Abuse and Neglect
- [ ] Obesity/Nutrition/Physical Activity
- [ ] Signs of Illness/Blood - Borne Pathogens
- [ ] Sudden Infant Death Syndrome (SIDS)
- [ ] EMSA - Approved Pediatric First Aid
- [ ] EMSA - Approved Pediatric CPR
- [ ] EMSA - Approved Preventive Health and Safety Practices

Observation and Assessment Tools:

- [ ] Ages & Stages Questionnaire - Social/Emotional, Second Edition (ASQ:SE-2)
- [ ] Ages & Stages Questionnaires, Third Edition (ASQ-3)
- [ ] Classroom Assessment Scoring System (CLASS)
- [ ] Desired Results for Children and Families (DRDP)
- [ ] Environment Rating Scales (ERS)
- [ ] Other

While the bottom portion of the **Add Training** page does not contain required fields, it is recommended that all fields be completed to provide more through information about the trainings searchable on the Training Calendar.

If there are additional key words that you would like to be searchable on the Training Calendar, use the Keyword Tags feature below.

Make sure you select "Add Tag" after each word or phrase and select "Save Changes."

Keyword Tags:

Add Tag

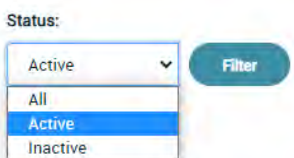
Clear Tags

Previous Page Save Changes Cancel

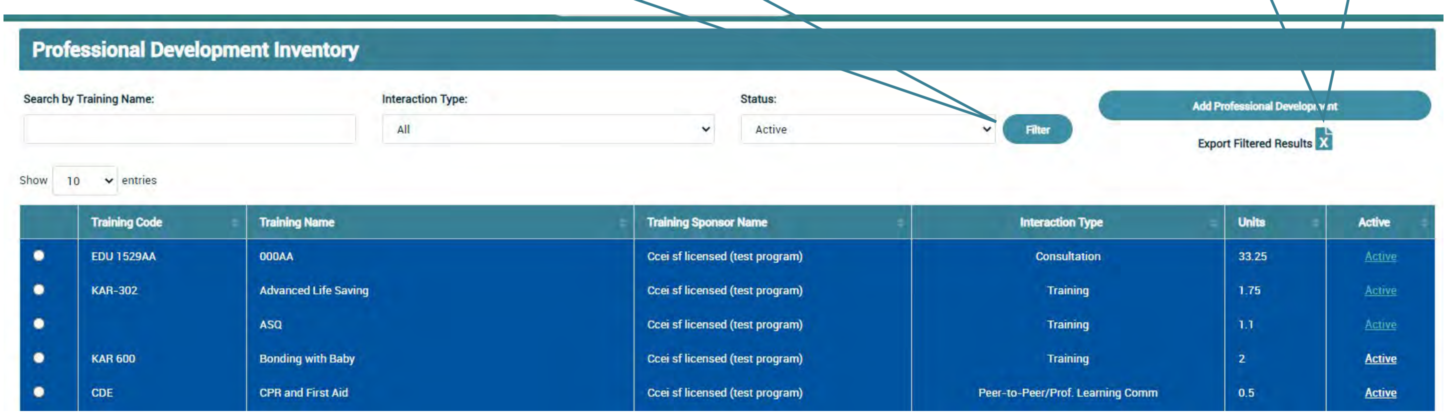
1.1.3.1. Professional Development Inventory/Catalogue

To view the list of all trainings your organization offers, click the **Professional Development Inventory** link from the **Training Sponsor Tools** *(see screenshot).*

Trainings can be marked as Active or Inactive on **Edit Training** which archives the training. See below. Trainings can be filtered by All, Active, or Inactive which means that Inactive trainings can be viewed and edited.



The Excel icon will export all trainings into an Excel Spreadsheet, and includes the Registry Assigned Training ID number

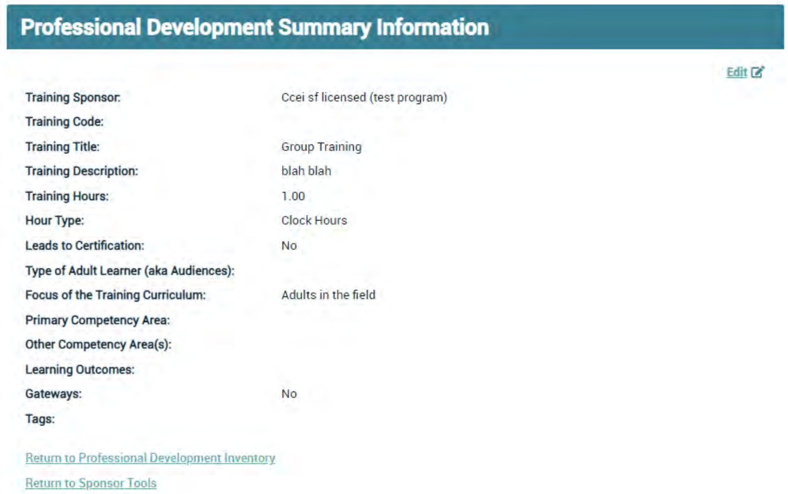


	Training Code	Training Name	Training Sponsor Name	Interaction Type	Units	Active
	EDU 1529AA	000AA	Ccei sf licensed (test program)	Consultation	33.25	Active
	KAR-302	Advanced Life Saving	Ccei sf licensed (test program)	Training	1.75	Active
		ASQ	Ccei sf licensed (test program)	Training	1.1	Active
	KAR 600	Bonding with Baby	Ccei sf licensed (test program)	Training	2	Active
	CDE	CPR and First Aid	Ccei sf licensed (test program)	Peer-to-Peer/Prof. Learning Comm	0.5	Active

To see training details or edit/update a training, click the circle next to the training and then click **View Training Details**.

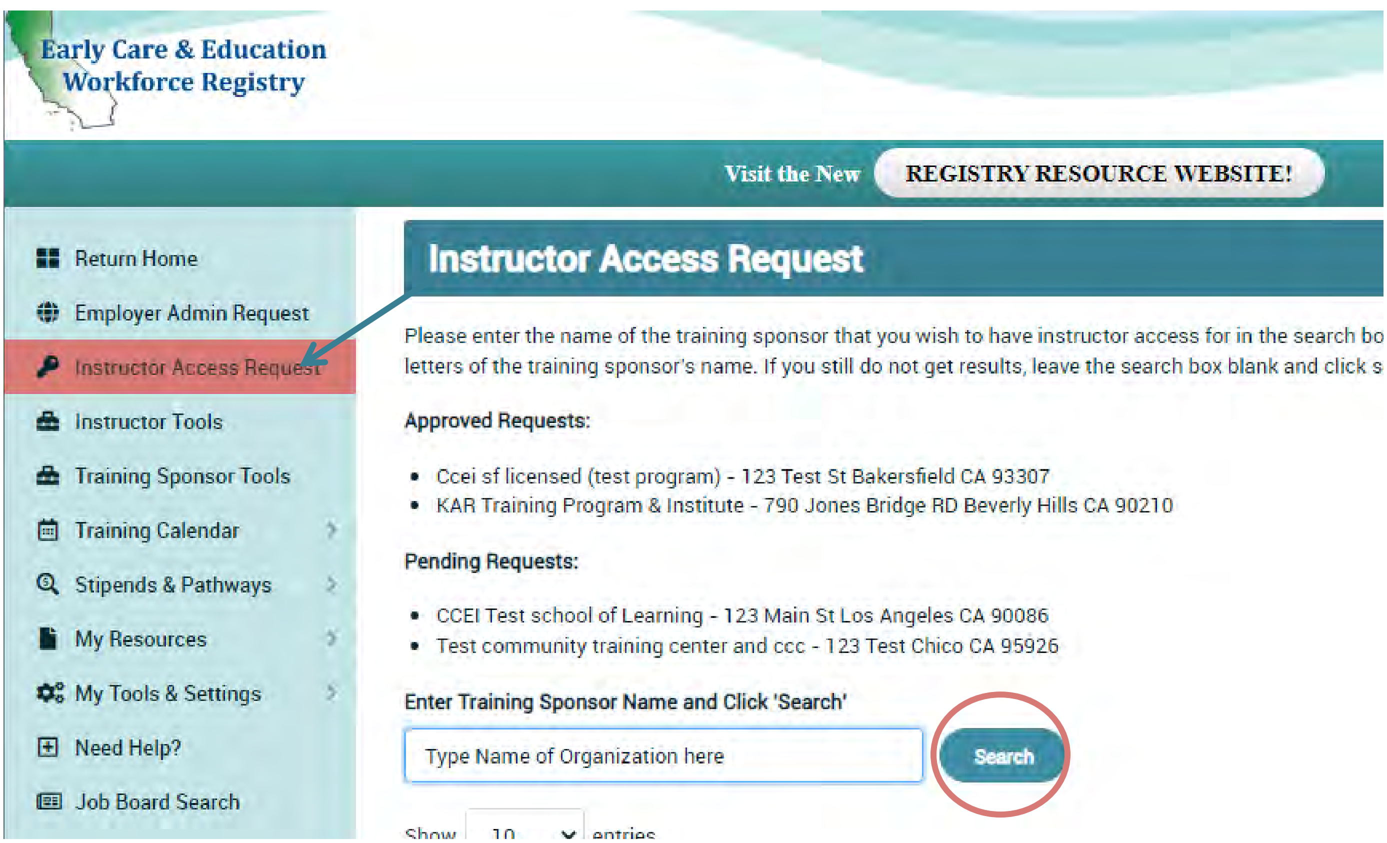
When the "**Edit**" link is clicked, the same screen as **Add Training** will appear *(see Add Training screenshot section 1.1.3)*.

When the Active checkbox is unchecked, the training is archived, which means that Instructors will not be able to select the training in **Add Event** but it is available to be checked as Active again at any time. Any participant records associated with the training are not affected including participant Education & Training Reports.



When all changes have been completed, click **Save Changes** at the bottom of the screen.

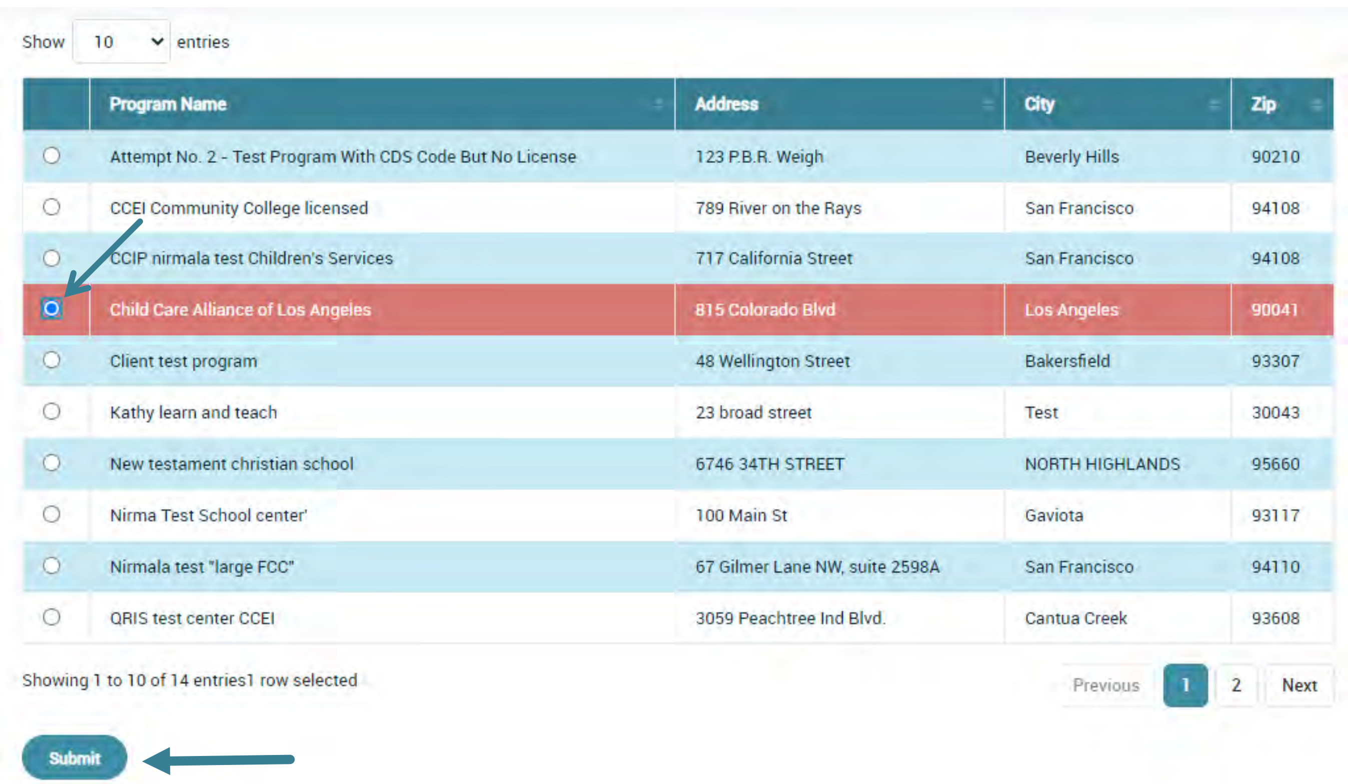
1.1.4. Instructor Access Request



Training Sponsors can also grant Instructor Access by entering the Instructor's Registry ID number on **Add Instructor** (see section 1.1.6. Add Instructor).

For trainers, who will provide trainings for your organization, including **Contact/Sponsor Managers**, the instructor can request access to the training calendar by doing the following:

- The instructor must first have a Registry profile, login to his/her profile, with their work email address, and click **Instructor Access Request** on the navigation bar. The Instructor Access Request page will pop up.
- The instructor will type in the name your organization and click **Search**.
- The instructor will click the circle next to your organization and click **Submit**.
- A successful submission will result in "Pending Requests" and/or "Approved Requests" being listed.
- At this point, the instructor must wait for your approval to proceed with the Instructor Tools.


Show 10 entries

	Program Name	Address	City	Zip
○	Attempt No. 2 - Test Program With CDS Code But No License	123 P.B.R. Weigh	Beverly Hills	90210
○	CCEI Community College licensed	789 River on the Rays	San Francisco	94108
○	CCIP nirmala test Children's Services	717 California Street	San Francisco	94108
◉	Child Care Alliance of Los Angeles	815 Colorado Blvd	Los Angeles	90041
○	Client test program	48 Wellington Street	Bakersfield	93307
○	Kathy learn and teach	23 broad street	Test	30043
○	New testament christian school	6746 34TH STREET	NORTH HIGHLANDS	95660
○	Nirma Test School center'	100 Main St	Gaviota	93117
○	Nirmala test "large FCC"	67 Gilmer Lane NW, suite 2598A	San Francisco	94110
○	QRIS test center CCEI	3059 Peachtree Ind Blvd.	Cantua Creek	93608

Showing 1 to 10 of 14 entries1 row selected

Previous 1 2 Next

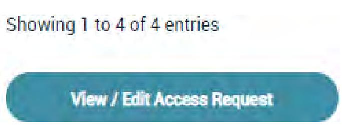
Submit

1.1.5. Instructor Management

After the instructor has successfully submitted the **Instructor Access Request** or if you have added the instructor on **Add Instructor**, the instructor will appear in a list in the **Instructor Management** link in the **Training Sponsor Tools**.

- The Instructor Management page will list the instructors pending approval or denial.
- When you select "Request Type" status: **Pending**, **Declined**, or **Approved**, you must click "**Filter**" to list all instructors who have made an Instructor Access Request.
- Instructor emails are provided, if you need to contact them.
- Click on the radio dial to the left of the instructor names and **View/Edit Access Reques**t to change status of an instructor.
- Use the Headers to sort by Registry ID number, First Name, Last Name, Email, or Request Status.

Instructor Education & Training Report and Profile View is now available to training sponsors in order to view instructor qualifications. Instructor Profile View will not be available if the instructor has not published their profile.



Be sure to deny access requests by individuals that you do not know, and/or do not want access to your training inventory and the ability to post trainings.

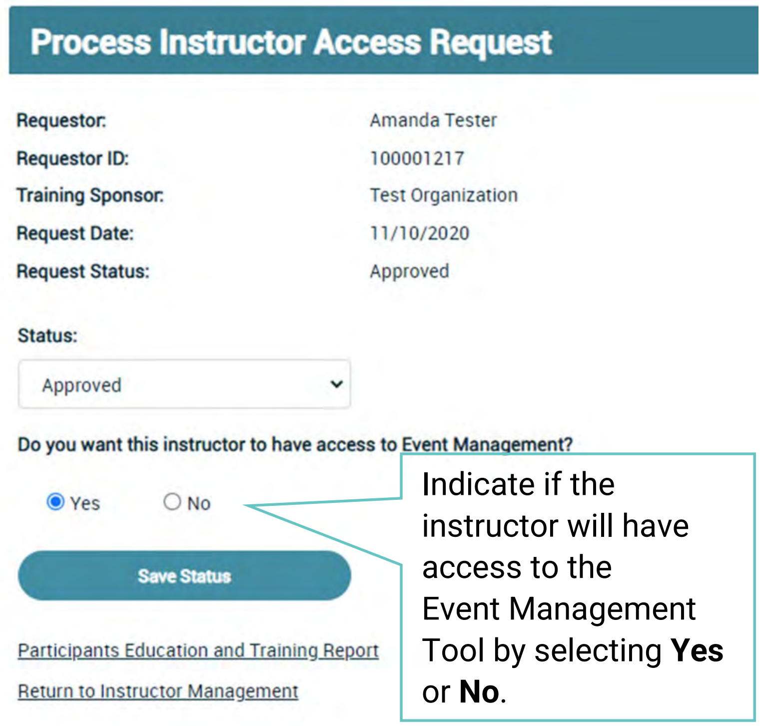
Click the drop-down box to either approve or deny the instructor access request, then click **Save Status**.

Once the request has been processed, the instructor will no longer appear in the Pending list.

Click the drop-down box and select **Approved**, then click "**Filter**" to see all approved instructors. Click **Denied, "Filter"** to view all denied instructors.

The **Process Instructor Access Request** screen will appear. Click the dropdown box to change the status, and then click **Save Status**.

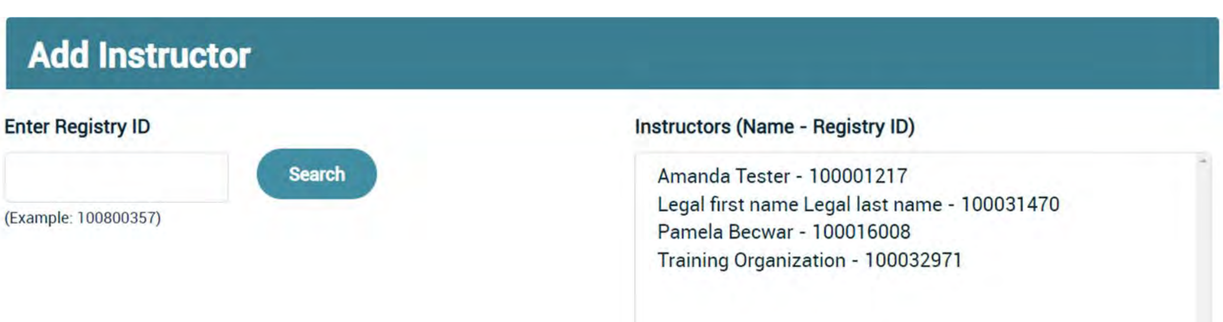
To change the status of a processed request, go to the **Instructor Management** page, select **Approved, Pending,** or **Denied** in the dropdown box, click "**Filter**", click the circle next to the name of the instructor, then click **View/Edit Access Request.**



Note: Once a sponsor has either approved or denied an instructor request, an email is automatically sent to the instructor notifying him/her of their status. Upon approval, the instructor will have access to the "Instructor Tools" on navigation bar on the left.

Add Instructor

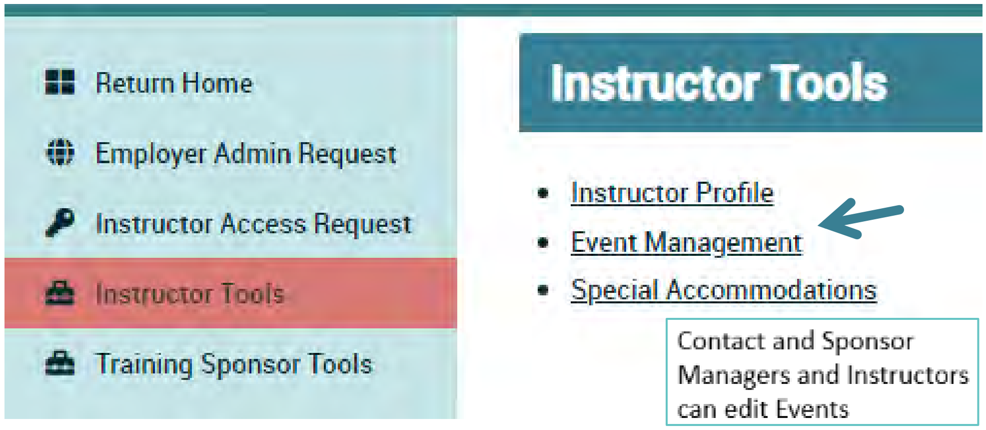
Training Sponsors can also **Add Instructors** from the **Training Sponsor Tools** by entering the Instructor's Registry ID number. Click **Search** to verify correct name and select if Instructor will have access to Event Management, before clicking on **Add Instructor**.



1.1.6. Event Management

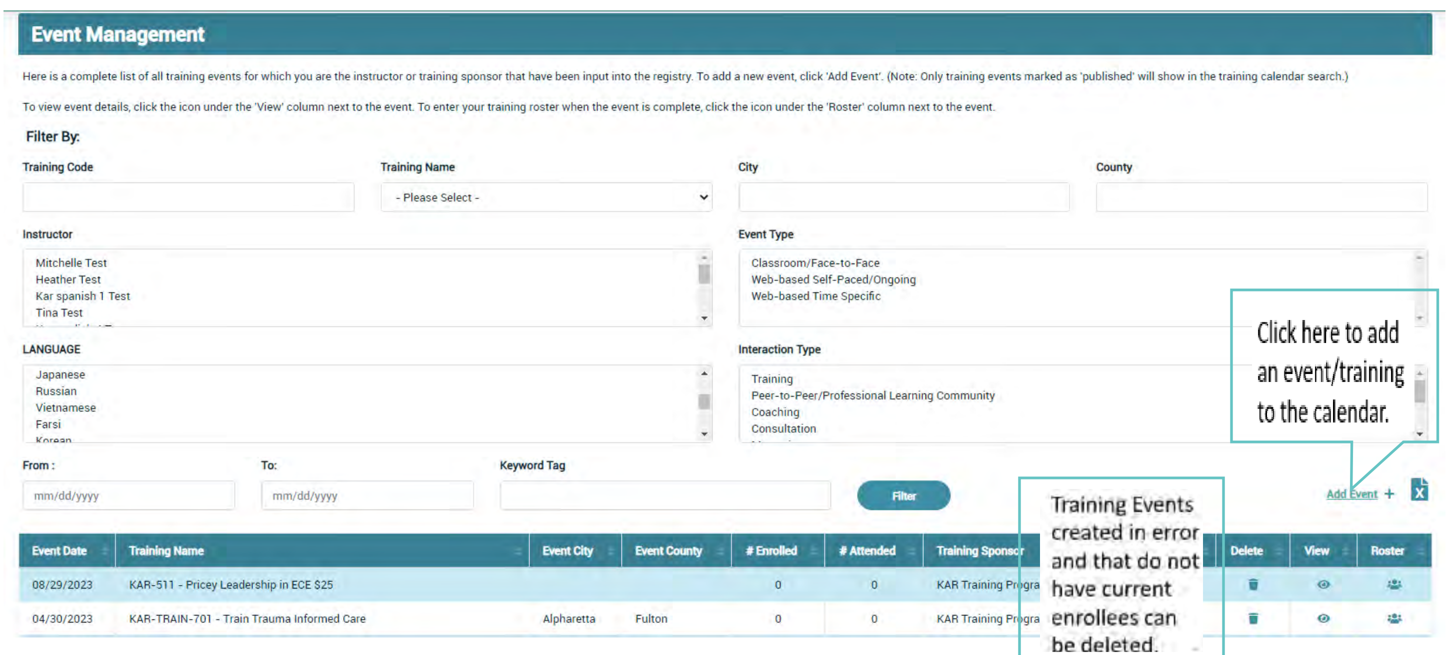
Once trainings are added and instructors approved, you can begin scheduling and posting trainings to the Training Calendar. Building an event includes pulling from a drop down of instructors to assign to the training. Only Training Contact or Sponsor Managers can add more than one Instructor to a training event. If your organization has a guest speaker, for example, the Fire Chief, you will want to assign the instructor who will be at the training with the Fire Instructor, and note in the description, the guest speaker. You can also attach a bio, and/or other relevant info.

Begin by selecting **Event Management** in the **Training Sponsor Tools**.



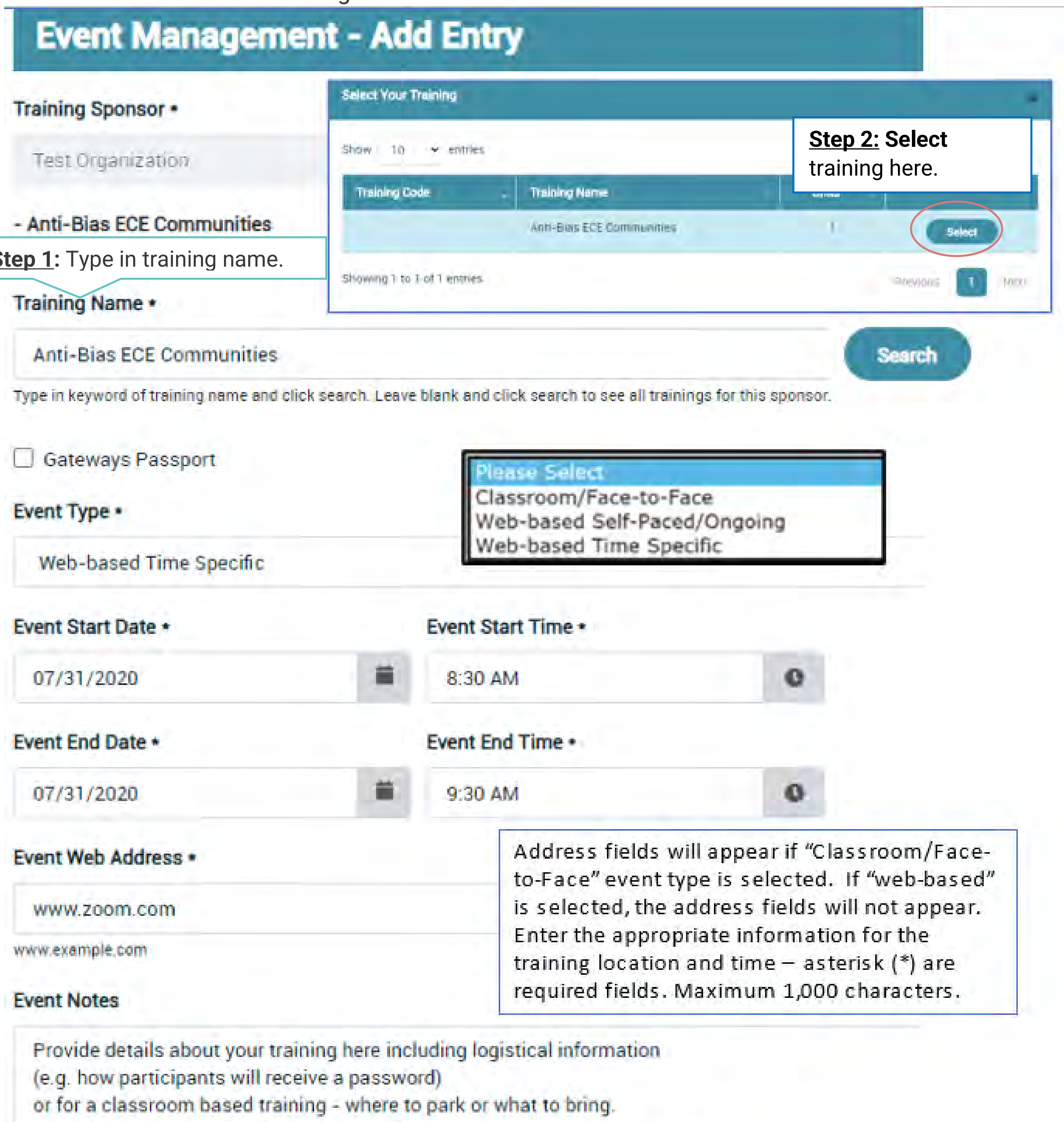
- The **Event Management** screen will contain a list of all trainings that have been posted to the calendar, including past and future trainings. Initially, this screen will be blank until a training has been added to the calendar. To add a training/event to the calendar, click the **Add Event** link to take you to **Event Management – Add Entry**.

NOTE: The training sponsor/contact managers and the sponsor's approved instructors can add events to the calendar but Instructors can only see events where they are the instructor and they cannot add other instructors to the event.



- To enter the **Training Name**, type in a key word of the event in the box and click **Filter**. The training name will be pulled from the list of trainings added to the Registry as instructed in **1.1.3 Add Training Inventory/Catalogue** above and it must also be an event. After clicking **Filter**, a pop up with the list of training events that match the key word will populate. **Select** the desired training event in the pop-up box to view training events on the Event Management page.

- After clicking on **Add Event,** type in the training name or click on **Search.** The training title is pulled from the list of trainings added to the Registry in **Add Training**. If the training is not there, you need to go back to the **Training Sponsor Tools** to **List Training** to verify whether the training was added to the inventory. If not, see **Add Training** above and create the training.
- **Select** training.



- **Event Type** is a drop-down box with the choices of classroom, web-based self-paced/ongoing, and web-based time specific.
  - If "Classroom/Face-to-Face" is chosen, additional fields will come up for location address. If "Web-Based" is chosen, location address field will not display.
    - When "Classroom/Face-to-Face or "Web-based Time Specific" is chosen a Training Reminder box will appear near the bottom of the page enabling email reminders to be sent to trainees enrolled in the Training Event on the Registry.
- **Event Notes** is a free-type text box that will be visible to enrollees and potential enrollees. Information in this field is included in the confirmation email sent when a participant enrolls in a training. This box will notify enrollees of any special instructions or other important specific information regarding the training – maximum of 1,000 characters.

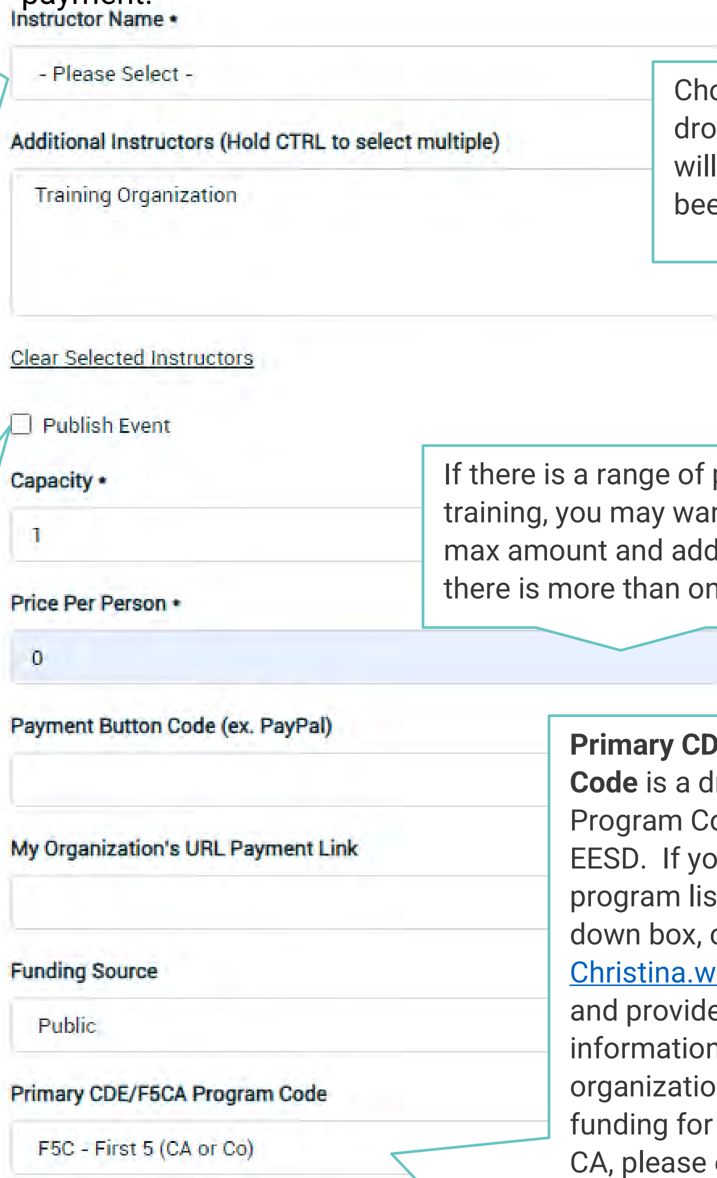
- **Language of Instruction** is a multi-check box that will be visible to enrollees and potential enrollees looking for language preference.
- **Intended Audiences** refers to those who the training was designed for, not everyone you think will attend the training. Multiple audiences may be chosen but if you select "Trainer" this training will be reported as a "Training the Trainer".
- **Instructor Name** For Contact/Sponsor Managers using Training Sponsor Tools, this is a drop-down box will list all the names of instructors the sponsor has approved. For Instructor Tools, an instructor can only list themselves as an instructor If there are multiple instructors have the Contact/Sponsor Manager list the Event.
- **Publish Event** – by clicking this box, the training will be published on the Training Calendar for all participants to see. If this box is not checked, the event will not appear on the training calendar. You can toggle between published and not published on the **Event Management** page.
- **Event Capacity** once the capacity has been reached, all other participants who want to enroll will be waitlisted, if the waitlist is enabled. If an enrollee withdraws, the next participant on the waitlist will be enrolled.
  - The sponsor/instructor can also increase the capacity on the **Roster**. If capacity is increased, the next participant on the waiting list will automatically be enrolled. An email is automatically sent to each enrollee and waitlisted participant letting him/her know of their enrollment status and price of the training.

- **Price Per Person** is intended for trainings where fees are collected for training. If there is no fee, insert 0, otherwise include the cost to alert potential trainees. Instructions on payment can be included in the Event Notes section. If there is a range, you may want to include the range in the Event Notes section with additional information.
- **Payment Button Code** is where sponsors can set up a PayPal or other 3rd party payment option on the Registry to collect payment for trainings. Once an account has been set-

up to receive payments, the Button Code can be accessed and entered into the Event. (See your 3rd party service to identify the "Button." When completing the Registration process, the individual will receive a confirmation email of enrollment in the training which will include the **Button** (i.e. link to complete payment).

- **My Organizations's URL Payment Link** is where you can enter your organization's payment link. When completing the Registration process, the individual will receive a confirmation email of enrollment in the training which will include the link to complete payment.

More than one instructor can be selected for an Event. The instructor must be an approved instructor to be visible on the dropdown list.


Instructor Name *

- Please Select -

Additional Instructors (Hold CTRL to select multiple)

Training Organization

Clear Selected Instructors

Publish Event

Capacity *

1

Price Per Person *

0

Payment Button Code (ex. PayPal)

My Organization's URL Payment Link

Funding Source

Public

Primary CDE/F5CA Program Code

F5C - First 5 (CA or Co)

Choose the instructor from the drop-down box. The choices will be all instructors that have been **approved by the sponsor**.

If this box is checked, the event will be added to the training calendar for all participants to see. If it is not checked, the training will not be visible on the

If there is a range of price per person for a training, you may want to set the value at zero or max amount and add range in the Event Notes, if there is more than one price.

Primary CDE /F5CA Funding Code is a drop down of Program Codes issued by CDE-EESD. If you do not see your program listed in this drop-down box, contact the Registry, Christina.waterman@ccala.net, and provide updated information. If your organization also receives funding for training from First 5 CA, please email the Registry to add the F5CA code to the list.

Please go to the **CDE-EESD/First 5 CA Vendor Reporting**, in **Section 3** to learn about how to use this field and the Hosting field.

Is there a CDE/F5CA Vendor Host?

◉ Yes ○ No

Please identify the additional program(s) and/or CDE/F5CA Vendors that are collaborating to HOST this event.

##C - CCIP Program Code
##HST - California Health and Safety Training (CHST)
##PHS - CA Preventive Health and Safety Training (CPHST)
##R - R&R Program Code

Non-CDE/F5CA

COE

Text box to indicate any Non-CDE funded or Non-First 5 CA collaboration.

Training Reminder

1 Day

Dropdown to select “No Reminder” or reminders from 1 to 7 days before the training. Reminders will be sent to at 10:30pm (PST).

Copy Instructor on Enrollment Emails?

○ Yes ◉ No

If Instructor would like to receive email notifications when individuals enroll or change enrollment status for an event, select Yes.

Copy Sponsor Contacts on Enrollment Emails?

○ Yes ◉ No

Send Registry generated survey to attendees?

○ Yes ◉ No

If you would like to have a survey, send to training attendees to evaluate the training, click Yes. Survey is generated when training attendance is confirmed in the Roster. For more information see Section 1.1.9

Allow Waitlisted Participants?

Yes No

Maximum Number on Waitlist

25

Indicate if you would like to enable a Waitlist. The default is **Yes** or select **No** to turn off the Waitlist. You can indicate a maximum number of training participants on the Waitlist. Training participants are moved from the waitlist to enrolled as participants withdraw or if the capacity is increased.

Do you want to limit enrollment to only users who work or live in certain counties?

Yes No

Please select the counties that users can work or live in that you want to be able to enroll. * (Hold down the Ctrl (windows) / Control (Mac) button to select multiple options.)

Contra Costa
Del Norte
El Dorado
Fresno
Glenn

To limit enrollment to user who live or work in the selected county/counties, select **Yes** and select the county/counties. County is determined by zip code and participant county is self-reported data from participant profiles.

Which counties would you like the event to show in for a county event search? * (Hold down the Ctrl (windows) / Control (Mac) button to select multiple options.)

Contra Costa
Del Norte
El Dorado
Fresno
Glenn

If a participant searches by county on the Training Calendar, Training Search, the training will show up in selected counties.

How would you like users to enroll in this event? *

Through another method

Enter enrollment instructions *

* Note: Uploading a new file replaces the old file. Upload documents up to 5 MB in size that are file formats: word, jpg, pdf.

Choose a file... Choose

Add Event

When all information has been entered in the **Event Management - Add Entry**, click **Add Event**. The event will be added to the **Event Management** page.

Event Management

Here is a complete list of all training events for which you are the instructor or training sponsor that have been input into the registry. To add a new event, click 'Add Event'. (Note: Only training events marked as 'published' will show in the training calendar search.)

To view event details, click the icon under the 'View' column next to the event. To enter your training roster when the event is complete, click the icon under the 'Roster' column next to the event.

Filter By:

From : To:

Training Name

- Please Select -

Filter

Training Events can be filtered by **Training Name** and click "**Filter**" or by date range of training event From and To (MM/DD/YYYY).

Clicking **View** will take you to the **Training Event Details** page.

Export all or filtered training events by using the Excel icon below.

Add Event +

Event Date	Training Name	Event County	# Enrolled	# Attended	Training Sponsor	Published	Delete	View	Roster
06/26/2020	CCIP - Registry Cafe		0	0	Test Organization	No			
06/05/2020	TIC - COVID-19 and Trauma		1	0	Test Organization	No			
05/23/2020	HST - Immunizations and the Law		1	1	Test Organization	No			
05/01/2020	Hot Topics	San Bernardino	0	3	Test Organization	No			

County will not be listed for Web-based trainings.

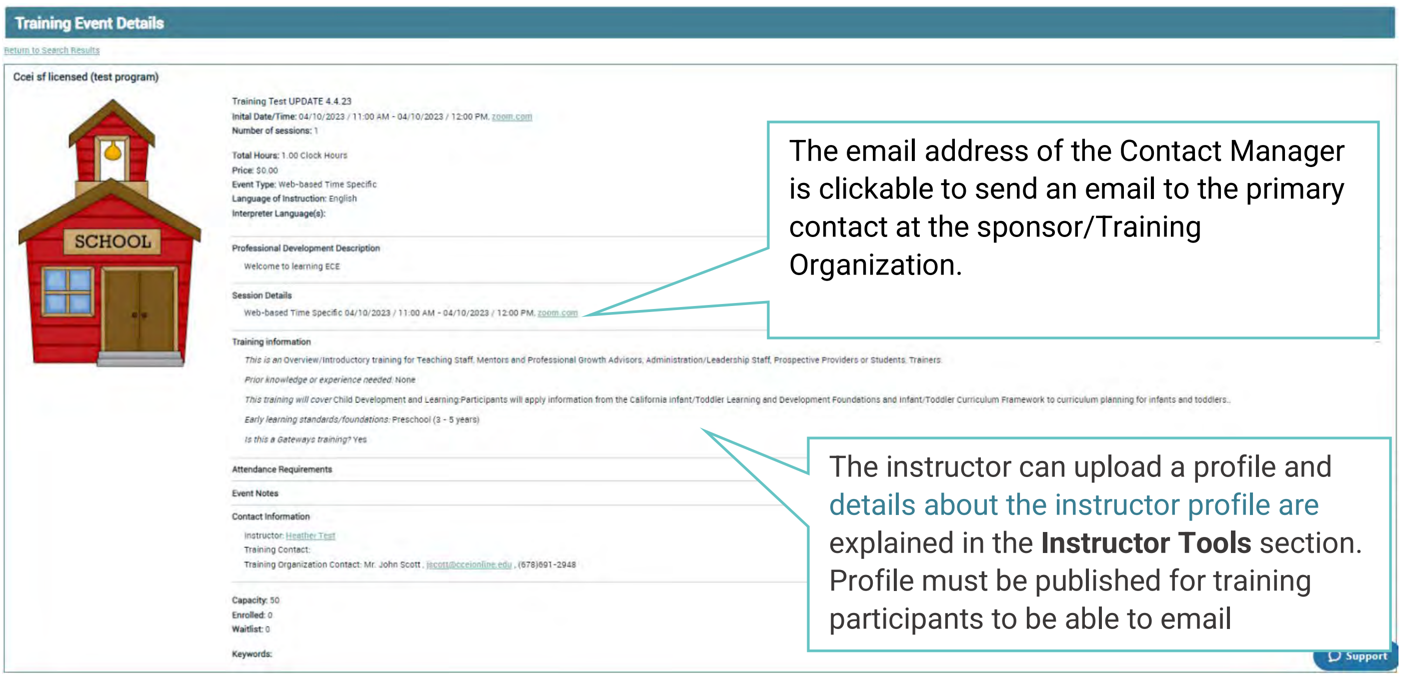
To view the status of training enrollments and number of individuals marked attended for this event see **Number Enrolled** and **Number Attended**.

To change an event from "Published" to not published or vice versa, simply click **Yes** in the published column and the **Yes** will change to **No** and will not be published on the training calendar.

Clicking this icon will take you to the **Training Roster** which contains a list of the participants who have enrolled in the training.

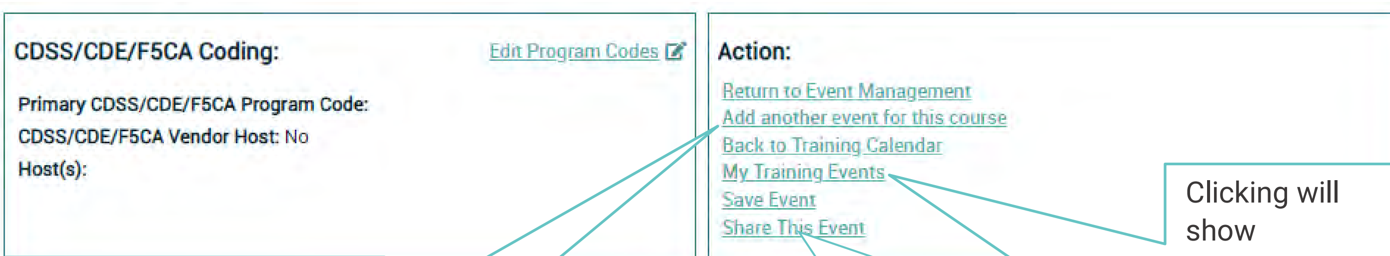
Note: Only delete training events if there are no enrollees.

- If details of the training need to be edited, <u>only the **Contact/Sponsor Manager(s)** may access the editing tools</u>. Instructors that are not also Contact Managers will not be able to **Edit Event** or **Edit Program Codes**.
- The top of the page includes the general training information. Edits to this section occur when the training is accessed through **List Training** from **Training Sponsor Tools**.
- The **Training Event Details** page provides important details about the training. This is also the page the participants will see when they want more information on the training. **Event Cost**, **Event Capacity**, **# Enrolled** and **# Waitlisted** are summarized on the bottom of the page.



The email address of the Contact Manager is clickable to send an email to the primary contact at the sponsor/Training Organization.

The instructor can upload a profile and details about the instructor profile are explained in the **Instructor Tools** section. Profile must be published for training participants to be able to email



To add another event with the same training but different date, click **Add another event for this course** and change the pertinent information, such as date, time, and location of training.

To copy a link or QR code for a training click **Share This Event**.

Clicking will show participant's enrollment status of trainings and Saved Events, if applicable, on the Training Calendar in **My Training Events.**

When **Cancel Event** is clicked, it will send a notice to enrollees that the Training Event has been canceled. The training event will show up on the Event Management page in red. Once you Cancel Event, you cannot Add Event using the same training title and date. You cannot “un-cancel” an event. Contact the Registry for support if you need to add the event back onto Event Management.

When **Edit Event** is clicked, the event page opens, enabling editing all elements. Events can be edited before the event takes place.

Click **Update Event Information** to save Event information that will not impact current enrollees.

Click **Update Event Information/Resend Confirmation Email** to inform current enrollees of changes that may impact their enrollment, such as event location or time.

The **Training Roster** contains the names of all participants enrolled in the training and contact information. The sponsor and approved instructor will have access to the Roster.

1. ***Enrollment Status*** change of an enrolled participant, by clicking the link in the **Status** column next to the participant's name *(see screen shot for enrollment status above)*.
2. ***Email*** can be sent to the participant individually or all at once. Each participant's email address is hyperlinked to send a message individually or click the **Email All Registrants** to send an email to all enrollees at once, attachments cannot be sent to registrants from within the Registry. This email is generated as a bulk email from the instructor which, depending on the recipient's email settings can sent to junk mail.
   - ***Note: If you want to email recipients attachments, click the Excel icon to export a list of all registrants. You can highlight all of the email addresses and copy and paste the list into the blind carbon copy (BCC) field of your external email system, for example Microsoft Outlook. Sending the email in the BCC field, will prevent other registrants from viewing the email addresses of others.***
3. ***Payment Status*** If a participant pays for the training at the time of enrollment with the PayPal option, the status will say "Paid." If the participant chooses to pay at a later time by check, cash, or credit card, the sponsor or approved instructor can manually change the payment status *(see screenshot for payment status above)*.
4. ***Mark All As Attended*** option is NOT available until the day of the training. If everyone on the roster attends the training, upon the conclusion of the training the sponsor/instructor can click **Mark All As Attended** and everyone's profile will be updated with the training information. If enrollees were absent, the sponsor/instructor can change the status to **No-Show** for each individual that was absent.
5. ***Add Non-Enrolled Attendee to Roster*** is NOT available until the day of the training. If a participant shows up to the training that did not register prior, the sponsor/instructor can add the participant to the roster manually by clicking this option. The participant MUST have an active Registry profile *(see sample of **Add Non-Enrolled Attendee to Roster**)*.

   Add Enrollee to Event Up to a day before the event takes place, training participants can be added to the training event on the Roster by clicking on **Add Enrollee to Event** and adding the enrollee's Registry ID number to the Enter Registry ID field, click on **Search**, and that the enroll name is correct before clicking Add Enrollee.

   CDE/F5CA Attendee Coding, go to Section 3: CDE-EESD/First 5 CA Training Vendors to apply State program funding codes to attendees to generate a Direct Service Profile Report – CDTC Format.

Add Non-Enrolled Attendees

This function is for you to add a user to the roster, who did not previously enroll in the training through the registry. The user must have a registry account and you need their CA Registry ID in order to add them. Enter the user's registry ID and completion date where shown then click 'Add to Roster'. Their name will appear on the right hand side of the screen.

If you add someone in error, highlight their name on the roster list and click 'Remove from Roster'. You will be able to come back and add additional people at any time.

Enter Registry ID

100001446

(Example: 100800357)

Add to Roster

Roster (Name - Registry ID)

St John, Amie - 100001446
Test, Anastasia - 100001215
Test, Kar Canton 3Test - 100001194
Organization, Training - 100032971

Remove from Roster

If an individual was entered incorrectly, highlight the individual, and select **Remove from Roster** below.

Add the Registry ID number of the participant to be added to the roster, then click **Add to Roster**. The participant's name will appear in the Roster list.

MARK ALL AS ATTENDED

Name	Primary Language	Cell Phone	Status	Email	Payment Status	Training Hours Earned
Anastasia Test	English		Attended	anastasiatestccei@gmail.com	Not Reported	6.00
Kar canton 3test Test	Spanish	(987) 456-4640	Attended	karcanton3@gmail.com	Not Reported	6.00
Training Organization	English		Attended	elisec4218@gmail.com	Not Reported	6.00

Showing 1 to 3 of 3 entries

Previous 1 Next

Email All Registrants

Mark All As Attended

Print By Status: *(Optional)*

- Please Select -

Chat

If everyone on the roster attends, click **Mark All As Attended** and everyone's profile will be updated with the training info.

An **Enrollment Status** can be changed by selecting **Attended**, **Withdrawn** or **No Show** and the training info will be updated for the individual.

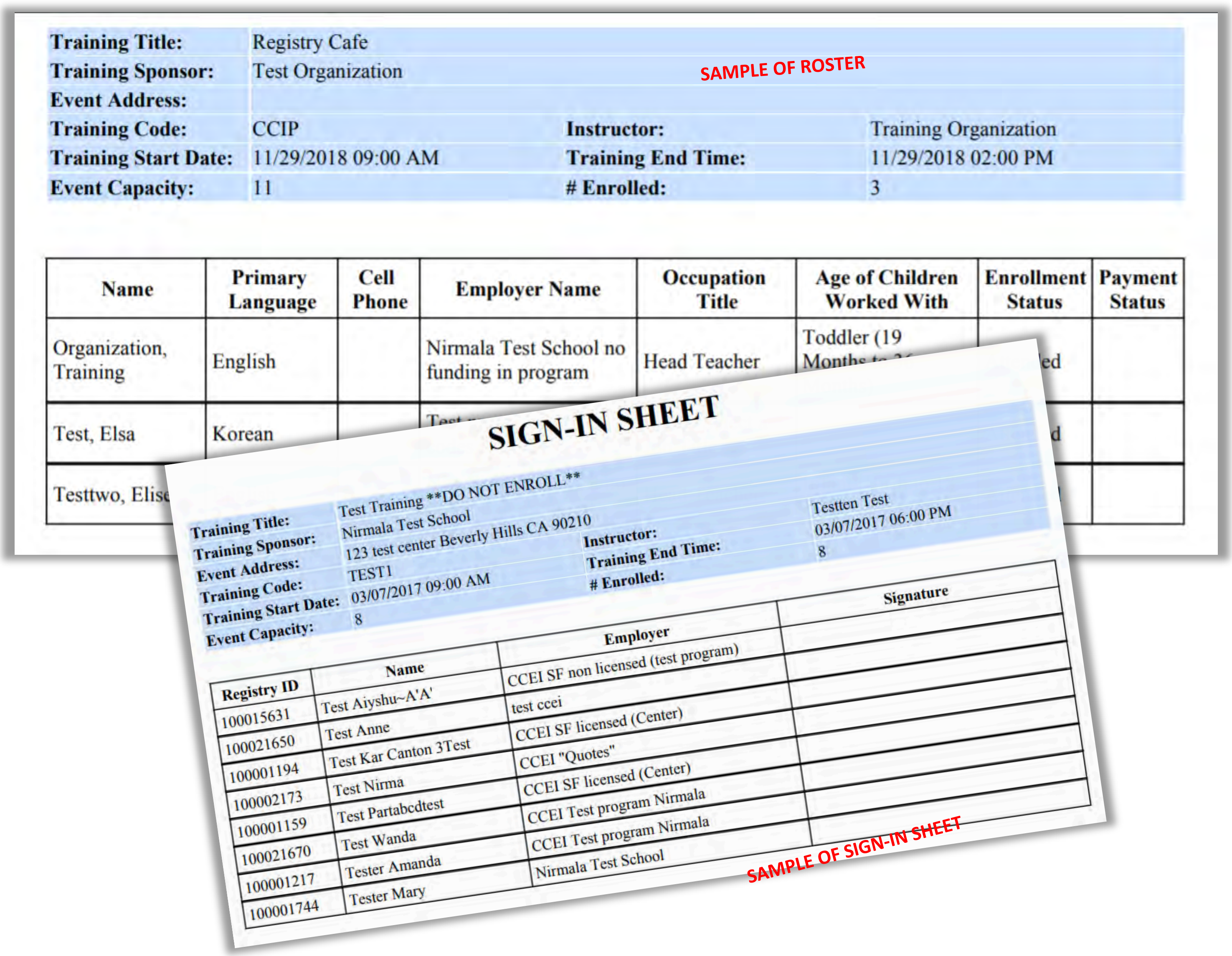
Edit Enrollment Status - Anastasia Test

Status: Attended

Attended
Withdrawn
No Show

Close Update

8. Print Roster and Print Sign-In Sheet can be printed or exported by the sponsor/instructor if necessary *(see samples of **Print Roster** and **Print Sign-In Sheet** below).*



SAMPLE OF ROSTER

Training Title:	Registry Cafe		
Training Sponsor:	Test Organization		
Event Address:			
Training Code:	CCIP	**Instructor:**	Training Organization
Training Start Date:	11/29/2018 09:00 AM	**Training End Time:**	11/29/2018 02:00 PM
Event Capacity:	11	**# Enrolled:**	3

Name	Primary Language	Cell Phone	Employer Name	Occupation Title	Age of Children Worked With	Enrollment Status	Payment Status
Organization, Training	English		Nirmala Test School no funding in program	Head Teacher	Toddler (19 Months to 36…	[illegible]	
Test, Elsa	Korean		Test…			[illegible]	
Testtwo, Elis…						[illegible]	

SIGN-IN SHEET

Training Title:	Test Training **DO NOT ENROLL**		
Training Sponsor:	Nirmala Test School		Testten Test
Event Address:	123 test center Beverly Hills CA 90210	**Instructor:**	
Training Code:	TEST1	**Training End Time:**	03/07/2017 06:00 PM
Training Start Date:	03/07/2017 09:00 AM	**# Enrolled:**	8
Event Capacity:	8		

Registry ID	Name	Employer	Signature
100015631	Test Aiyshu~A'A'	CCEI SF non licensed (test program)	
100021650	Test Anne	test ccei	
100001194	Test Kar Canton 3Test	CCEI SF licensed (Center)	
100002173	Test Nirma	CCEI "Quotes"	
100001159	Test Partabcdtest	CCEI SF licensed (Center)	
100021670	Test Wanda	CCEI Test program Nirmala	
100001217	Tester Amanda	CCEI Test program Nirmala	
100001744	Tester Mary	Nirmala Test School	

SAMPLE OF SIGN-IN SHEET

9. ***Special Accommodation Requests*** is an Excel report that shows accommodations needed by training enrollees. Enrollees are provided an open text box while they are enrolling for trainings where they can provide information about reasonable accommodations need in a training.

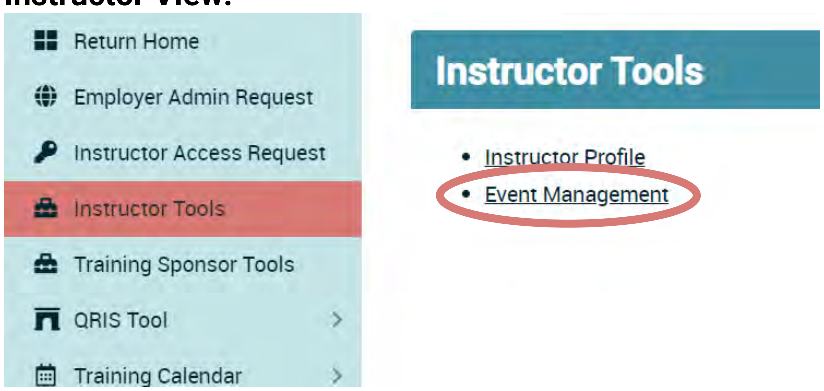
The report fields include:
Registry ID, First Name, Last Name, Event ID, Event Name, Sponsor Name, Event Start Date, Accommodations.

1.1.7. Invite Only/Targeted Audience (Unpublished) Events

If you want to share a training with a specific targeted group, you can email potential trainees an URL link.

Please follow the steps below:

a. When you are logged in as an Instructor or Sponsor, go to either the **Instructor Tools** or **Training Sponsor Tools** accordingly, and then select **Event Management**.
Instructor View:

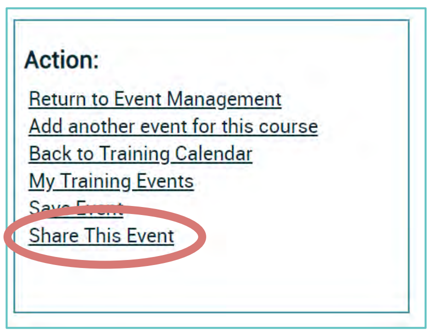


Training Sponsor Contact Manager/Additional Sponsor Manager View:

b. Find the training you wish to share and then click on the **View**.

Event Date	Training Name	Event County	# Enrolled	# Attended	Training Sponsor	Published	Delete	View	Roster
10/31/2019	first test - FIRST TEST	Los Angeles	1	0	Nirmala Test School no funding in program	No			
03/22/2019	first test - FIRST TEST	Los Angeles	0	0	Nirmala Test School no funding in program	No			
05/12/2018	662 - Exploring Visual/Spatial Intelligence		1	4	Nirmala Test School no funding in program	No			

c. When the Training Event Detail page shows (you should see an **Enroll Now** button on the page), go to the bottom right "Action" and click on **Share This Event** and then click on "**Copy Link to This Event**" and the notice will indicate that the "**Event Copied**". You can now paste the link or QR code.

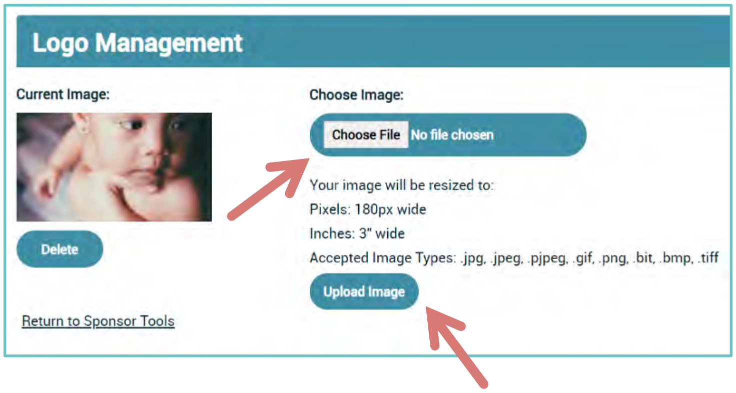


When you send an email to share your training URL or QR code, user will be prompted to log into the Registry to continue the enrollment process. If they are logged in, and they are on the **Training Event Detail** page, they will be able to enroll in the training. You will be able to see their name on your roster once they enroll.

1.1.8. Manage Logo

To add an organization logo to all trainings click **Manage Logo** and then **Choose File, Upload Image**, see screen shots below.

- The logo will be displayed when potential attendee clicks to view the **Training Information** in the Training Calendar, Training Event Details.



1.1.9. Survey

Once a participant has completed the training and the sponsor/instructor has updated his/her enrollment status to **Attended**, an email will be sent to the participant requesting that he/she take a brief survey of the training, if you selected **"Send Registry generated survey to attendees?"** in the Event Management – Add Entry. The participant must log-in to his/her profile to access the survey and surveys can be accessed on Training Calendar, "My Training Events". Once the participant submits the survey, the sponsor will have access to the results in the **Reports** section (see 1.1.10) of the **Training Sponsor Tools**. The survey is anonymous.

My Training Enrollments

06/05/2020	COVID-19 and Trauma	Test Organization	Enrolled	Withdraw
06/23/2020	COVID-19 and Trauma	Test Organization	Attended	Take Survey
07/04/2018	Ages & Stages	Test Organization	Attended	
11/28/2017	Emergent Curriculum	Test Organization	Attended	
12/04/2018	Provider Training Community of Practice	Test Organization	Attended	
11/29/2018	Registry Cafe	Test Organization	Attended	

Please note: The survey is the same for each training. A sample of the survey is shown on the next page.

<u>**Summary of Survey Elements**</u>

1. The training was well organized.
2. The training followed the syllabus/agenda provided.
3. The training provided opportunities to engage in self-reflection.
4. The quality of the training met my expectations.
5. The training was sensitive to the needs of participants.
6. The information covered will be useful in my daily work.
7. The training kept me engaged and interested.
8. The training content was in line with the objectives presented.
9. The training contributed to my educational, professional and/or personal development.
10. I would recommend this training to other people.
11. My learning objectives were met in taking this training.
12. Please elaborate on any areas that you rated as strongly disagree or disagree.
13. Please tell us one thing that you will implement as a result of this training.
14. Is there anything else you'd like to tell us about this training?

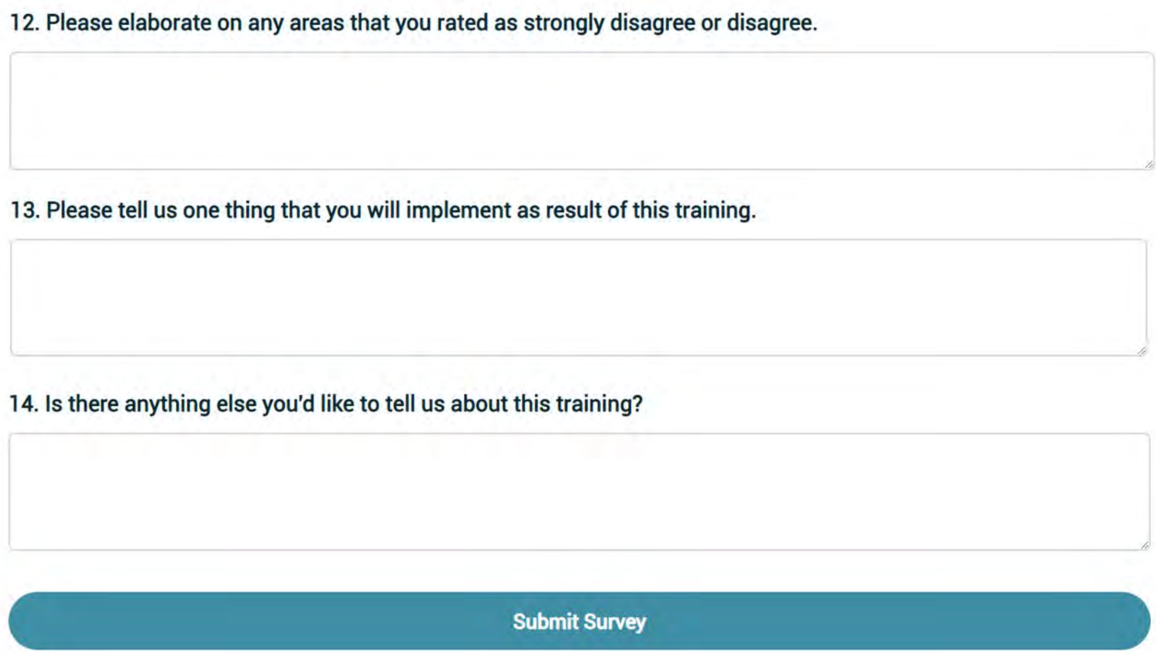
Training Evaluation

Please complete the training evaluation below on the training event that you attended, specified below.

SURVEY SAMPLE

Training Code:
TIC
Training Name:
COVID-19 and Trauma
Training Sponsor:
Test Organization
Instructor:
Training Organization
Date:
06/23/2020 08:30 AM
Location:
Zoom link here

	Strongly Disagree	Disagree	Agree	Strongly Agree	N/A
1. The training was well organized.	○	○	○	○	○
2. The training followed the syllabus/agenda provided.	○	○	○	○	○
3. The training provided opportunities to engage in self-reflection.	○	○	○	○	○
4. The quality of the training met my expectations.	○	○	○	○	○
5. The training was sensitive to the needs of participants.	○	○	○	○	○
6. The information covered will be useful in my daily work.	○	○	○	○	○
7. The training kept me engaged and interested.	○	○	○	○	○
8. The training content was in line with the objectives presented.	○	○	○	○	○
9. The training contributed to my educational, professional and/or personal development.	○	○	○	○	○
10. I would recommend this training to other people.	○	○	○	○	○
11. My learning objectives were met in taking this training.	○	○	○	○	○


12. Please elaborate on any areas that you rated as strongly disagree or disagree.
13. Please tell us one thing that you will implement as result of this training.
14. Is there anything else you'd like to tell us about this training?
Submit Survey

1.1.10. Reports

The Contact and Sponsor Managers have access to some reports depending on whether or not they are receiving funding from the CDE-EESD. To access reports, click **Reports** in the **Training Sponsor Tools** *(see screenshot below)*.

Report Descriptions and Fields:

1. **Events Offered Report** details every training offered by the sponsor including the training title, instructor, start date and time, end date and time, type of training, primary core competency area, and total participants who enrolled, attended, withdrew, were no shows, and were waitlisted. This report will download in excel format.

   Data Fields in Report

   a. **Sponsor ID**: Registry issued unique ID for the Organization
   b. **Sponsor Name**
   c. **Training Sponsor County**: County of administrative address of Training Sponsor
   d. **Event ID**: Registry issued unique ID for the Event
   e. **Training ID**: Registry issued unique ID for the Training
   f. **Training Hours**: Hour value of training
   g. **Training Name**: Name of the training created by Organization/Sponsor
   h. **Interaction Type**: Type of training, for example, Training, Coaching, TOT etc.
   i. **Instructor Name**: Name of instructor/s assigned to the training
   j. **Instructor ID**: Registry ID of instructor/s assigned to the training event.
   k. **Primary Program Funding Name**: Name of CDE-EESD/F5CA funding source, only visible by CDE-EESD/F5CA Contractors **[CDE-EESD/F5CA Contractors only].**
   l. **Non-CDE/F5CA**
   m. **Primary Core Competency Area**: Applicable primary Core Competency Area from the Competency Mapping Tool. To learn more click here!
   n. **Gateway Passport**: If training event is affiliated Gateways Passport Program **[LA County only]**
   o. **Training Event County**: County where training event is located, if applicable.
   p. **Language of Instruction**
   q. **Hosts**: CDE-EESD Contractors that are tagged as hosts of the Training Sponsor **[CDE-EESD/F5CA Contractors only].**
   r. **Event Start Date**
   s. **Event Start Time**
   t. **Event End Date**
   u. **Event End Time**
   v. **Event Type**: Classroom, Web-based Self Paced, Web-based Time Specific
   w. **# Enrolled**: Number enrolled on the training on the Registry
   x. **# Attended**: Number of confirmed attended on the Registry
   y. **# Waitlisted**: Number waitlisted for the training on the Registry
   z. **# No Show**: Number of individuals marked as registered but not showing up for the training

aa. **# Withdrawn**: Number of individuals withdrawn on the Registry
ab**. Total Participants**: Total number of participants that enrolled, attended, waitlisted or did not show up for training. Numbers will include duplicate individual interactions
ac. **Child Development and Learning**
ad. **Culture Diversity and Equity**
ae. **Relationship Interactions and Guidance**
af. **Family and Community Engagement**
ag. **Dual Language Development**
ah. **Observation Screening Assessment and Documentation**
ai. **Special Needs and Inclusion**
aj. **Learning Environments and Curriculum**
ak. **Health Safety and Nutrition**
al. **Leadership in Early Childhood Education**
am. **Professionalism**
an. **Administration and Supervision**

2. **Demographics Summary Report** details the ethnicity, job title at the completion of the training, and the highest level of education of each participant who completed each training. This report will download in excel format.

   Data Fields in Report
   a. **Sponsor ID**: Registry issued unique ID for the Organization
   b. **Event ID**: Registry issued unique ID for the Event
   c. **Training ID**: Registry issued unique ID for the Training
   d. **Training Name**: Name of the training created by Organization/Sponsor
   e. **Instructor Name**: Name of instructor/s assigned to the training
   f. **Race/Ethnicity of User**
   g. **Job Title of User at the Time of Training Completion**: Job Title of individual, if currently employed, at the time of the training
   h. **Highest Level of Self-Reported Education of User**: High level of education reported by the user
   i. **Completed Training Evaluation**: Yes/No to completion of the survey provided by the Registry

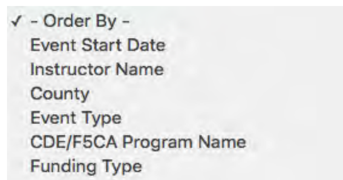
3. **Event Feedback Report** details the training title, instructor/s, numbered responses to each question, and the comments (if any) written by the participant. All participant information is anonymous. This report will download in excel format. Responses are averaged from a 4-point scale: Strongly Disagree (1) – Strongly Agree (4). See Survey section above.

   Data Fields in Report
   a. **Sponsor ID**: Registry issued unique ID for the Organization
   b. **Event ID**: Registry issued unique ID for the Event
   c. **Training ID**: Registry issued unique ID for the Training

d. **Training Name**: Name of the training created by Organization/Sponsor
e. **Instructor Name**: Name of instructor/s assigned to the training
f. **# of Completed Surveys**
g. **Q1 – Q11 (column G - Q)**: Survey answers based on average from a 4-point scale: Strongly Disagree (1) – Strongly Agree (4).
h. **Comments**: Q12 – Q14

4. **Training Sponsor Data Export** is filtered and customized by the sponsor containing both training event and participant data.

   Filters:
   1. Training Event Date range
   2. Instructor/s Name
   3. County: Location of training event, no location if training is web-based
   4. Event Type
   5. CDE/F5CA Program Name
   6. Funding Type



   This report also enables the user to select the first column in the dataset by the following sort criteria, then by A-Z or Z-A order:

   The following data elements can be extracted based on the filters chosen above:

   <u>**Data Fields in Report**</u>

   i. **Event Information**
      a) **CDE/F5CA Vendor Number**: Vendor ID assigned by the California Department of Education (CDE), including County Offices of Education.
      b) **User CDE/F5CA Program Name**: CDE/F5CA Program Code assigned to individual attendee, if applicable, such as PIN, 01R, etc.
      c) **Non-CDE/F5CA**
      d) **Funding Type**: Assigned to individual attendee, if applicable whether funding is fully funded by CDE or qualifies for "Fee-for-Service" under CDE guidelines, aka code 8.
      e) **Training ID**: The unique ID assigned to the training by the Registry
      f) **Training Name**: The name of the training as listed in the **List of Trainings** on the Sponsor Tools menu.
      g) **Primary Core Competency Area**
      h) **Child Development and Learning**
      i) **Culture Diversity and Equity**
      j) **Relationship Interactions and Guidance**
      k) **Family and Community Engagement**
      l) **Dual Language Development**
      m) **Observation Screening Assessment and Documentation**

n) **Special Needs and Inclusion**
o) **Learning Environments and Curriculum**
p) **Health Safety and Nutrition**
q) **Leadership in Early Childhood Education**
r) **Professionalism**
s) **Administration and Supervision**
t) **Start Date**: Start date of the training
u) **End Date**: End date of the training
v) **Instructor**
w) **Language of Instruction**
x) **Event Type**
y) **Hour Value**
z) **Training Hours Earned**
aa) **Interaction Type**
bb) **Event County**
cc) **Gateway Passport**
dd) **Host Tagged**

> Letter on the right are intended to help support identification of fields in the Excel report for each row, however, depending on which fields are selected the row labels will be different

ii. **Participant Information**

a) **Registration Status**: Registration status at the time of the report
b) **Registry ID**: Registry identification number
c) **First Name**
d) **Last Name**
e) **Job Role**: Job Role
f) **Job Title**: Current job title
g) **Age of Population Served**: Age of the population served
h) **Gender**
i) **Race/Ethnicity**
j) **Language Spoken**: Primary language spoken by attendee
k) **Residential City**
l) **Residential State**
m) **Residential Zip Code**
n) **County of Residence**
o) **County of Current Employment**
p) **Email**
q) **Day Phone Number**
r) **Evening Phone Number**
s) **Cell Phone Number**
t) **Payment Status**

5. **Direct Service Profile Report – CDTC [State Funded Contractors ONLY]**
This report is an export of Registry data into the format required to submit information to the Child Development Training Consortium (CDTC) for reporting to the California Department of Education – Early Learning & Care Division. The report can be filtered by Training Organization/Sponsor, as well as date range and

by program code. *Contact CDTC staff regarding information on the Direct Service Profile reporting template.*

Online Registry Help Desk articles to support this topic:
Data Dictionary and Instructions for Direct Service Form (click here)
How to Read Your Direct Service Profile Report (click here)

6. **Training Sponsor Hosting Activities** **[State Funded Contractors ONLY]**
This report is an export of Registry data for the purposes of tracking data of CDE/F5CA hosting of CDE/F5CA Contractor training events. This is not a required report, but will support CDE/F5CA Contractors in reporting collaboration across CDE/F5CA contractors.

Data Fields in Report

i. **Training Sponsor Host Name**: The CDE/F5CA Contractor that was identified by a primary CDE/F5CA Contractor as collaborating to "Host" a professional development activity.
ii. **Training Sponsor Host Vendor Number**: The CDE/F5CA Vendor number issued by CDE-EESD.
iii. **Training Sponsor Host County Location**: Administrative address county location of identified "Host".
iv. **Name of Training**
v. **Date of Event**
vi. **Duration of Training**: Total hours of training
vii. **Attendees per Event**: Number of verified attendees identified by primary Training Sponsor that tagged the Host
viii. **County**: Training Event county location
ix. **Training Sponsor Name that Tagged Host**: CDE/F5CA primary funded organization that tagged another CDE/F5CA Contractor as a "Host."
x. **Training Sponsor Vendor Number that Tagged Host:** The CDE/F5CA Vendor number issued by CDE-EESD of primary funded organization that tagged another CDE/F5CA Contractor as a "Host."
xi. **Training Primary CDE/F5CA Program Code**: The Primary CDE/F5CA Program Code issued by CDE-EESD and assigned to the professional development activity by the primary funded organization that tagged another CDE/F5CA Contractor as a "Host."

7. CCIP Participant Training Hours Report **[State Funded CCIP Contractors ONLY]**
This report is an export of Registry data for the purposes of tracking CCIP participant training hours. This is not a required report but will support CDE/F5CA CCIP Contractors in reporting.

Data Fields in Report

a.) **Attendee Coding:** Training participant must have a CCIP attendee code to be included in the report and have taken a CCIP training with in the fiscal year.
b.) **Agency Name**
c.) **Participant Last Name**
d.) **Participant First Name**
e.) **Participant Registry ID**
f.) **Current Role Type**
g.) **Facility Type**
h.) **Participant's Work County**
i.) **License Capacity**
j.) **Number of Children Served**
k.) **First Date of ANY CCIP Training Completion:** Only includes trainings in the Registry.
l.) **Last date of ANY CCIP Training Completion:** Only includes trainings in the Registry.
m.) **Training Participant:** As defined by the CCCRRN Policy and Procedures.
n.) **Trainee:** As defined by the CCCRRN Policy and Procedures.
o.) **Advanced Trainee:** As defined by the CCCRRN Policy and Procedures.
p.) **Total CCIP Training Hours in Fiscal Year**
q.) **Total ALL CCIP Training Hours ALL TIME:** This is a “live” field and will include any training to the date the report is pulled.
r.) **Number of training hours completed in CDL**
s.) **Number of trainings completed in CDL**
t.) **Number of training hours completed in CDE**
u.) **Number of trainings completed in CDE**
v.) **Number of training hours completed in RIG**
w.) **Number of trainings completed in RIG**
x.) **Number of training hours completed in FCE**
y.) **Number of trainings completed in FCE**
z.) **Number of training hours completed in DLD**
aa.) **Number of trainings completed in DLD**
bb.) **Number of training hours completed in OSAD**
cc.) **Number of trainings completed in OSAD**
dd.) **Number of training hours completed in SNI**
ee.) **Number of trainings completed in SNI**
ff.) **Number of training hours completed in LEC**
gg.) **Number of trainings completed in LEC**
hh.) **Number of training hours completed in HSN**
ii.) **Number of trainings completed in HSN**
jj.) **Number of training hours completed in LECE**
kk.) **Number of trainings completed in LECE**
ll.) **Number of training hours completed in P**
mm.) **Number of trainings completed in P**

nn.) **Number of training hours completed in AS**
oo.) **Number of trainings completed in AS**

Training List Export **- Your Training Inventory can be accessed in your Training Sponsor Tools, List Training (see page 8 for more details).**

Training Event Export **- Your Training Events can be accessed in your Training Sponsor Tools, Event Management (see page 18 for more details).**

Note: **Since all reports download in excel format, the information in the reports can be edited, sorted, and filtered by the sponsor.**

1.1.11 Upload Attendance Data

The following are instructions and procedure for training sponsors who are approved and trained to upload training completions (attendance data) directly into the Registry and have completed the prerequisites and required activities described below. Contact Christy Waterman at Christina.waterman@ccala.net for assistance.

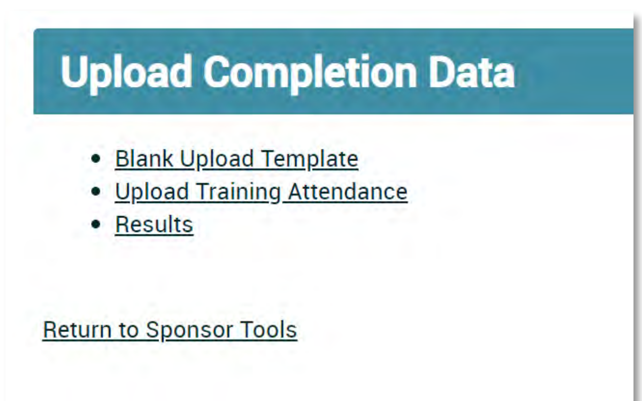
Prerequisites:

- **Add Event** (training) in the Registry on **Event Management**
- Capture the registry ID and First and Last Name of the user
- Have attendance data mapped to the fields provided in the “Blank Template”

Required:

- Registry approval to utilize the **Upload Completion Data** feature
- Complete an Attendance Import Procedures training by Registry Staff
- Complete first import with Registry Staff
- Required import monthly, at minimum, but we request that you upload training data ***weekly for the benefit of your training participants***.

Once an organization is approved and trained to utilize the import feature, an **Upload Completion Data** link**,** will appear on the **Training Sponsor Tools** menu. The **Upload Completion Data** menu includes **Blank Upload Templates**, **Upload Training Attendance**, and **Results.** Below are the images of what the new features look like on your Registry Training Sponsor account. You will still be able to access your Event Management, Roster, and confirm attendance, even after the Upload Completion Data tool is activated.



Best Practices:

Use a new Blank Template each time you compile your data.

Let training participants know that their names must match on your data collection system and on the Registry and let them know what will happen if there training does not upload (who can they contact at your organization for help).

Let training participants know when their training will appear on their Education & Training Report.

Blank Upload Template

The fields that are required for import into the Registry are described below including format needed. Depending on the platform you use to collect data, and the fields that you currently collect, you may need to add fields to your existing data collection system.

You will see a link at the bottom of the "Blank Upload Template" webpage that will generate a report that includes your organization's Event IDs, CDE Funding Codes, CDE/F5 Funding Types, and Payment Types – this makes it easy to find the data you will need for the import. There is a template to download that you will use when uploading.

There is no required naming convention for the file you will upload but be sure that the file type is .xlsx. Do not delete columns or change header.

<u>Template Fields</u>
Click on the **Blank Upload Template**, on the Registry. You will see the fields from the template are described on the webpage (see below). For non-required fields, if you do not have data for those fields leave the field blank. Please do not delete blank columns (columns that are not required)

Rows in the table (below) are aligned with the template fields.
Columns in the table (below) are described, 1 – 5.

1. "Column" from the Excel Import Template (Columns A – M).
2. Indicates if the field is "Required for all Sponsors."
3. Indicates if the field is "Required for CDE/F5 Funded" programs or if you have a CDE/F5 program code. You will be able to determine if you have CDE/F5 program codes by reviewing the "**<u>View your Organization's Event IDs, CDE Funding Codes, CDE/F5 Funding Types and Payment Types. These contain the valid option sets for these fields for your organization</u>**" link on the bottom of the **Blank Upload Template** page.
4. "Column Name (Field Name)"
5. "Description/Instructions" includes formatting, conditions for use, and description of field.

Column	Required for all Sponsors	Required for CDE/F5 Funded	Column Name (Field Name)	Description/Instructions
A	x	x	**eventID** **Required Field**	This is a unique eventID, assigned by the Registry, located in Events Offered Report.
B	x	x	**enrollmentDate** **Required Field**	The date the user enrolled in the course (mm/dd/yyyy) or the date of the import. Must be valid date and cannot be in the future.
C	x	x	**completedTrainingHours** **Required Field**	Training hours completed for this event.
D			**trainingEnrollmentPaymentTypeID**	Payment type
E			**amountPaid**	Amount paid for training, if applicable, otherwise leave blank
F			**paymentDate**	The payment date of the user (mm/dd/yyyy), otherwise leave blank. If date, must be valid date and cannot be in the future.
G	x	x	**completionDate** **Required Field**	The completion date of the training for that user (mm/dd/yyyy). Must be valid date and cannot be in the future.
H	x	x	**user ID** **Required Field**	The **registry ID** of the user that attended (format = 100000000)
I	x	x	**userLastName** **Required Field**	The last name of the user who attended.
J	x	x	**userFirstName** **Required Field**	The first name of the user who attended.
K	x	x	**uniqueKey** **Required Field**	A unique record identifier that that agency assigns that is not duplicated for any other course completion.
L		x	**cdeFundingCode** **Required Field**	CDE/COE/First 5 CA primary program code only, do not include Professional Development Delivery Type. Enter the ID associated with the codes specifically associated with your organization.
M		x	**cdeFundingType** **Required Field**	If Fee-for-Service Code is applicable insert 1, otherwise 0.

A. Event ID, required field, is a unique ID number assigned by the Registry. It is located in the **Events Offered Report** and is also available at the bottom of the **Blank Upload Template** in the link, "**View your Organizations Event IDs, CDE Funding Codes, CDE/F5 Funding Types and Payment Types. These contain the valid option sets for these fields for your organization**". You cannot import more than one of any individual training, per participant, per day. It is up to your organization's policy, if you limit how often a participant can take a training (e.g. if a participant can only be given credit for a training once a year, then you must limit that enrollment and not import that data for a participant).

B. Enrollment Date, a required field, is the date the user enrolled in the course or the date of the Import. Must be valid date and cannot be in the future. Please enter is using the MM/DD/YYYY format.

C. Completed Training Hours, a required field, refers to the training hours completed for this event. The is clock hours and CEUs must be converted to clock hours for import (decimal for partial hours). The data system that you collect data for import may also collect the time of completion. You may need to separate the date from the time, in order to have the correct format for import. To remove the time, which is data that is not needed for the import, you can use "Text To Columns" in Excel to separate the data. Highlight the column, choose the **Data** tab atop the ribbon, select **Text to Columns**, and select **Delimited** and choose the correct delimiter (e.g. there may be a space between the date and time, so select "space" as the delimiter).

D. Training Enrollment Payment Type ID, not a required field, refers to the payment type. ID numbers are available in the link, "**View your Organizations Event IDs, CDE Funding Codes, CDE/F5 Funding Types and Payment Types. These contain the valid option sets for these fields for your organization**". See the "Payment Types" tab to reference ID numbers (see below):

Unpaid	10
Credit/Debit Card	11
Check/Money Order	12
Cash	13
Free	14
Other	15

E. Amount Paid, not a required field, refers to the amount paid for training, if applicable. Otherwise leave blank.

F. Payment Date, not a required field, is the payment date of the user. Please use the MM/DD/YYYY format. This field can be left blank if not applicable. It must be a valid date, not in the future.

G. Completion Date, a required field, is the completion date of the user's training. Please use the MM/DD/YYYY format. Must be valid date and cannot be in the future.

H. User ID, a required field, refers to the Registry ID of the user who attended training. The Registry ID is 9 digits starting with a 100 (no dashes). The Registry ID number is a unique identifier for each participant generated when they created a CA ECE Workforce Registry profile. To ensure that you receive correct information from users, it is helpful to provide additional information on the required "Registry ID number" field and provide a link to www.caregistry.org. See Download Template section below for directions on how to remove dashes from the Registry ID number.

I. User Last Name, a required field, is the last name of the user who attended. The field will be used to verify that the Registry ID number matches with the User Last Name. This ensures that the import data is correct. If a person has a hyphenated last name, and one of the names are a match with the Registry data for that participant, data will be imported. If names are different from the Registry ID user's Last Name, the data will not be imported and will be included in the "failureResults" field on the "Upload Results" report.

J. User First Name, a required field, is the first name of the user who attended training. The field will be used to verify that the Registry ID number matches with either the User First or User Last Name. This ensures that the import data is correct.

Note: Your organization should have a policy about how data will be processed if the import fails. For example, will you contact participants to provide the opportunity to correct their Registry ID number? There may be cases, for example, where a last name was changed, and the import will fail. Your role will include providing information to participants so that they can currently enter their name into your platform and make sure that it is the same as the name in their Registry profile. The import file will strip restrictions on special characters such as accent marks, hyphens and spaces, there may be more than one last name; for example, Taylor-Crane should match Taylor Crane or TaylorCrane.

K. Unique Key, a required field, is a unique record identifier that that agency assigns. It is not duplicated for any other course completion. If you do not have a Unique Key in your data system, you can create a unique key in the data field by using Concatenate (Registry ID, Event ID, Date - with no spaces). See instructions below under "Download Template."

L. CDE Funding Code, a required field for Training Organizations that are funded by the California Department of Education, Early Learning, Care Support Division, and First 5 CA and are required to include data that will populate the Direct Service Profile Report. The CDE/COE/First 5 CA primary program code in this field is a 3-digit ID associated with the codes specifically associated with your organization. You can find your organizations codes by clicking on the link at the bottom of the **Blank Upload Template** page. The link is titled, **"View your Organizations Event IDs, CDE Funding Codes, CDE/F5 Funding Types and Payment Types. These contain the valid option sets for these fields for your organization**." the "Event Reference". Once you click on this link and open the Excel, reference the tab titled "CDE Funding Codes" (see image below). You *cannot* use the county code and program letter (e.g. 19C) as in some counties multiple organizations use the same county code. The "**Registry Code of CDE Funding Code**" is your organization's unique number. For more information about the Direct Services Profile Report click here.

Example:

CDE Funding Code	Registry Code of CDE Funding Code
19C	338

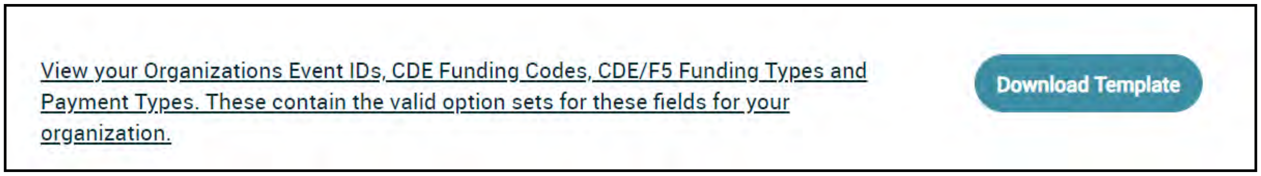
19HST	339
19PHS	340
19R	337
19SFN	341
F5C	346

M. CDE Funding Type, required field for Training Organizations that are funded by the California Department of Education, Early Learning and Care Support Division, and First 5 CA that are required to include data for these fields that will populate the Direct Service Profile Report.

Name of Funding Type	**Value of Funding Type**
No Funding Specified	0
Fee for Service	1
CDE/F5CA Funded	2

View Your Organizations Information – Event References

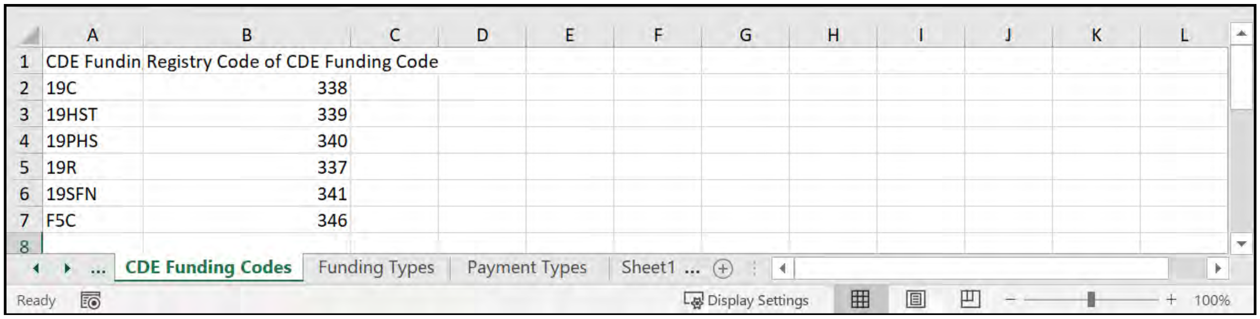
At the bottom of the **Blank Upload Template** page there is a link titled, "**View your Organizations Event IDs, CDE Funding Codes, CDE/F5 Funding Types and Payment Types. These contain the valid option sets for these fields for your organization.**"



This link provides an Excel report where you can reference information that you will need to complete your Upload Template including your organization's:

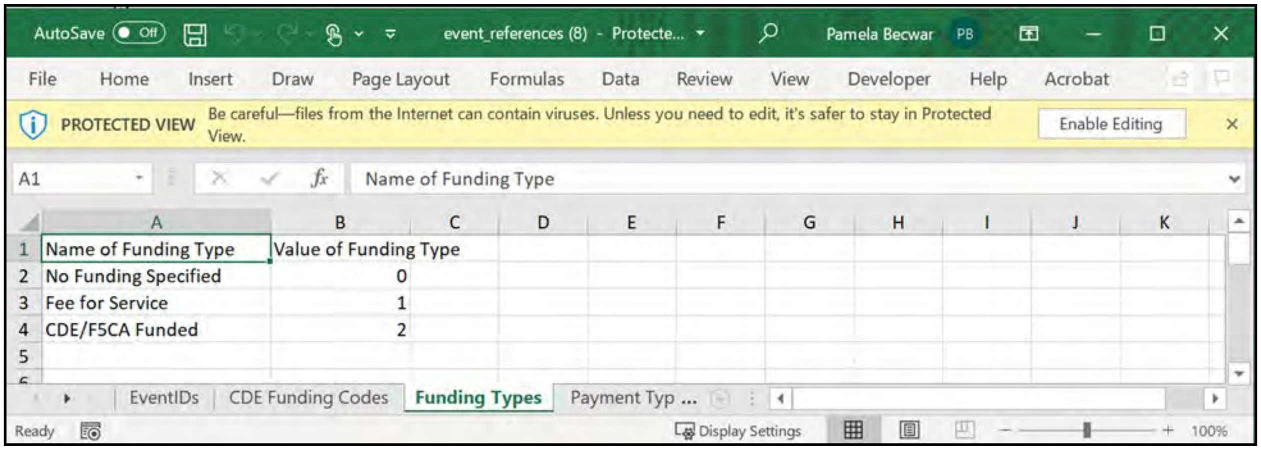
1. Event IDs are all the Events that you have listed on the Registry. For instructions on how to enter Events please reference the Training Calendar User Guide or Training Calendar video on the Resource Page.

2. CDE Funding Codes – See CDE Funding Codes

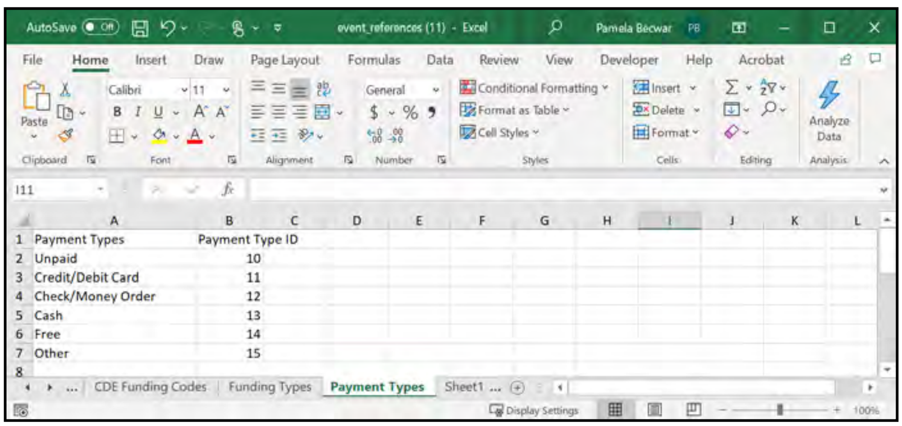


	A	B
1	CDE Fundin	Registry Code of CDE Funding Code
2	19C	338
3	19HST	339
4	19PHS	340
5	19R	337
6	19SFN	341
7	F5C	346

3. <u>CDE Funding Types</u> – See Name of Funding Types tab



4. <u>Payment Types</u> – See Payment Types tab



Download Template

Click on the **Download Template** button at the bottom of the **Blank Upload Template** page. The template is an Excel spreadsheet where you can copy and paste your data fields and prepare your Excel for upload. Download the template each time you are going to import attendance data (do not download once and repeatedly copy, paste, and rename the same file – doing so can create formatting issues).

<u>User ID</u> (column H) To remove dashes from the Registry ID number on the Excel download template:

Select column H
Hold the Control key and then press the H key.
In the '**Find what**' field, type the dash symbol (-)
Leave the '**Replace with**' field empty.

Click on **Replace All**.

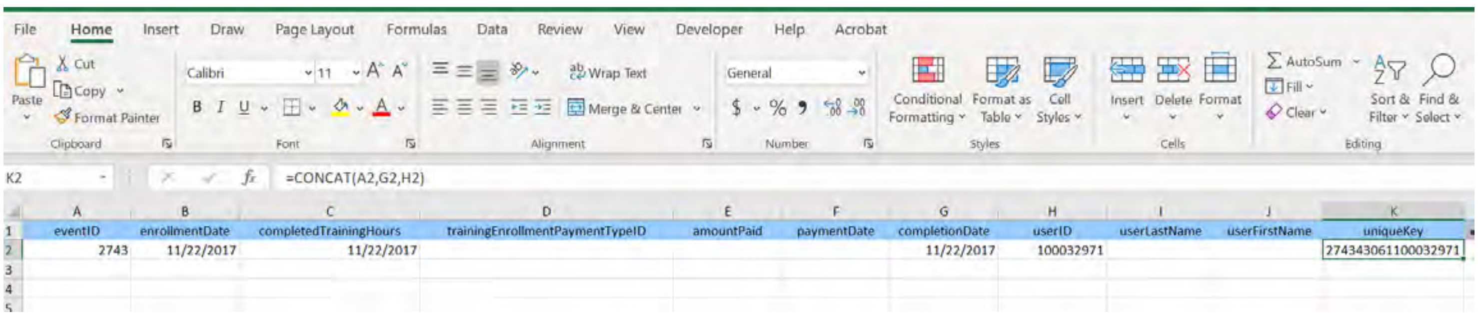
Unique Key (column K) If you do not collect a unique key from your attendance data, you can create a unique key by using Excel functions that combine the Event ID, the completion date of the training (no characters or spaces), and the Registry ID number.

As an example, you would combine the three numbers without any characters or spaces:

Event ID - 2717
Date of completion –11/27/2020
Registry ID number - 100032971

Unique Key – 271711272020100032971

In Excel you can use the concatenate function
=CONCAT(A2,G2,H2)
or you can use the ampersand (&) calculation operator which lets you join text items without having to use a function. For example, =A1 & G1 & H2 returns the same value as =CONCAT(A2,G2,H2).



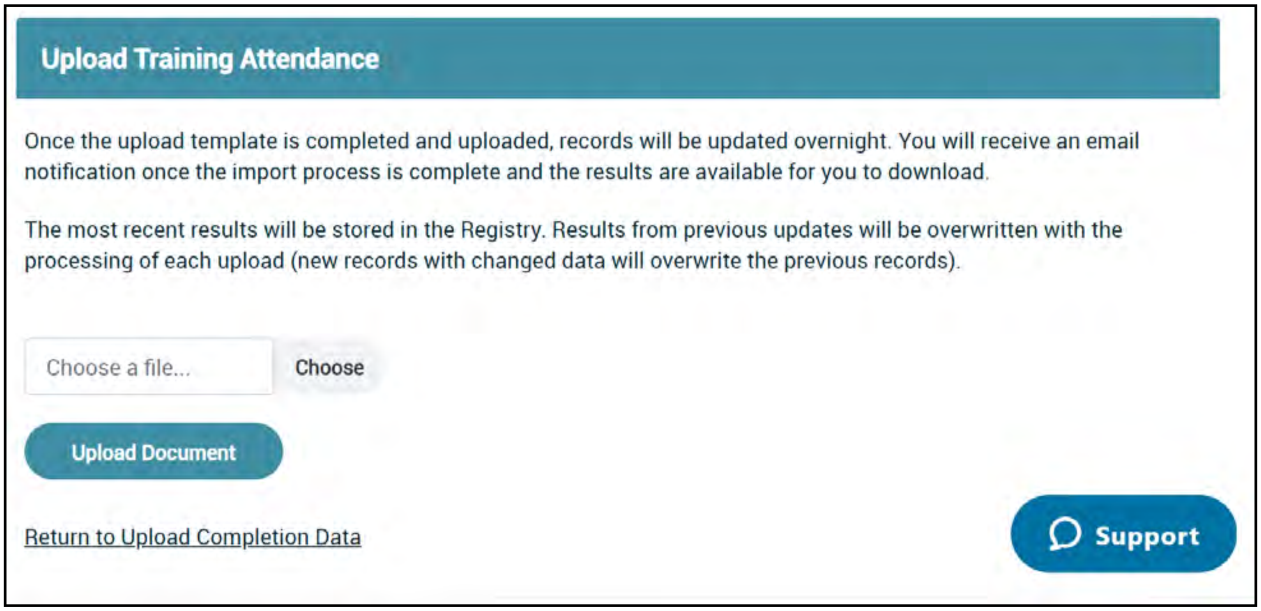
Upload Training Attendance

Navigate to **Training Sponsor Tools**, **Upload Completion Data**, and click on **Upload Training Attendance** to access upload feature.

When your import template is complete, be sure to check the upload file:

- Make sure Event ID is correct
- Check to see if the completion date is a valid date and is not in the future
- Check CDE funding codes provided to make sure they are associated with the training sponsor, if not, they will not import.
- User ID must be valid Registry ID (e.g. 123456789 is incorrect and can be removed from the data import). All Registry ID numbers are 9 digits, no dashes, and start with 100.
- Make sure there are no dashes or other symbols in data fields.

Formatting – For the file to import correctly, the cells must be formatted to match the **Blank Upload Template** (general or date format).

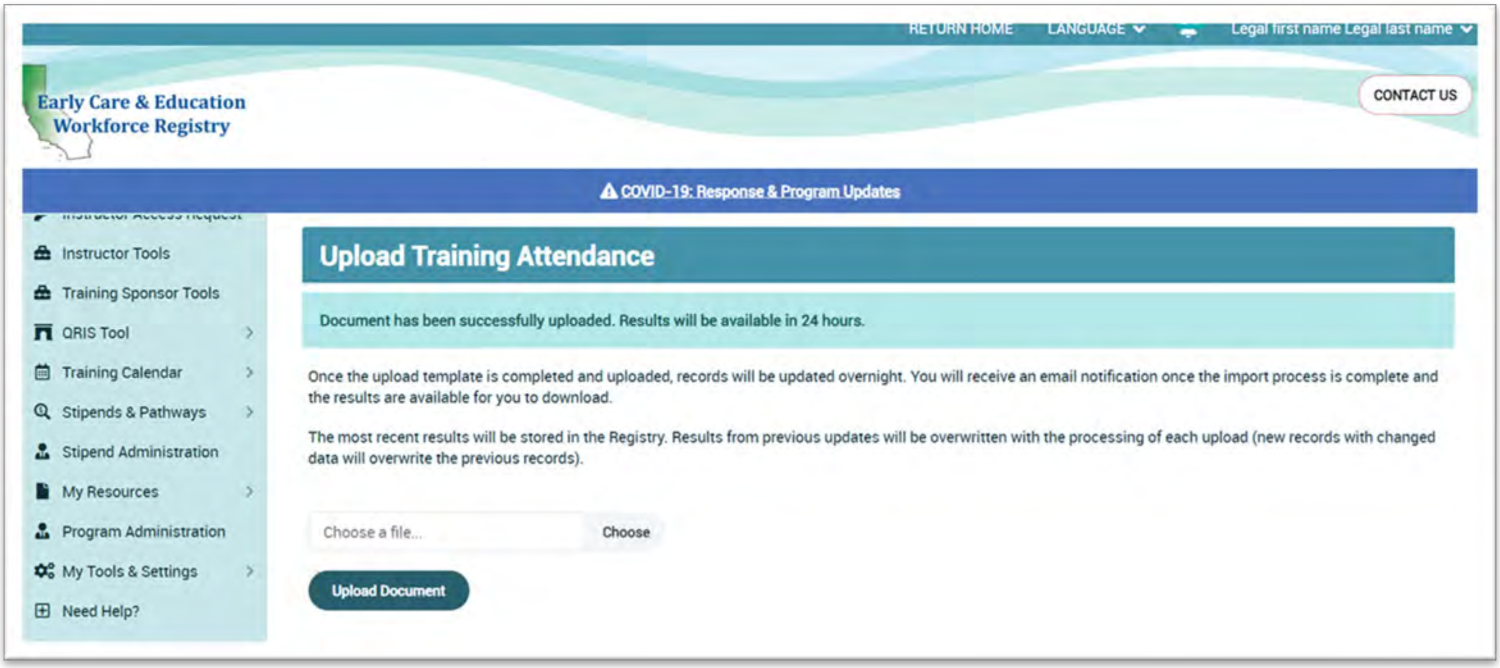


a. Select file to upload from your computer and click on **Upload Document**

b. System will check for valid fields for upload and you will receive a message, "Document has been successfully uploaded. Results will be available in 24 hours."

c. Results report will indicate if fields were not imported.

d. Uploaded data goes into the enrollments table (Event Management) and the transcript table (Education & Training Report).


RETURN HOME
LANGUAGE
Legal first name Legal last name
Early Care & Education Workforce Registry
CONTACT US
COVID-19: Response & Program Updates
Instructor Tools
Training Sponsor Tools
QRIS Tool
Training Calendar
Stipends & Pathways
Stipend Administration
My Resources
Program Administration
My Tools & Settings
Need Help?
Upload Training Attendance
Document has been successfully uploaded. Results will be available in 24 hours.
Once the upload template is completed and uploaded, records will be updated overnight. You will receive an email notification once the import process is complete and the results are available for you to download.
The most recent results will be stored in the Registry. Results from previous updates will be overwritten with the processing of each upload (new records with changed data will overwrite the previous records).
Choose a file...
Choose
Upload Document

Results

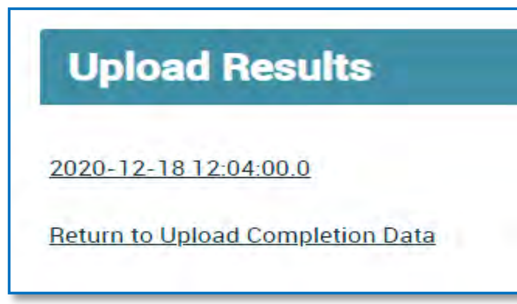
Once the import is completed, you will receive a link to a Results file, identified by the date/time that the file was imported (see Excel image below), with the import results titled “Results” and “failureReason” which is added to the import file.

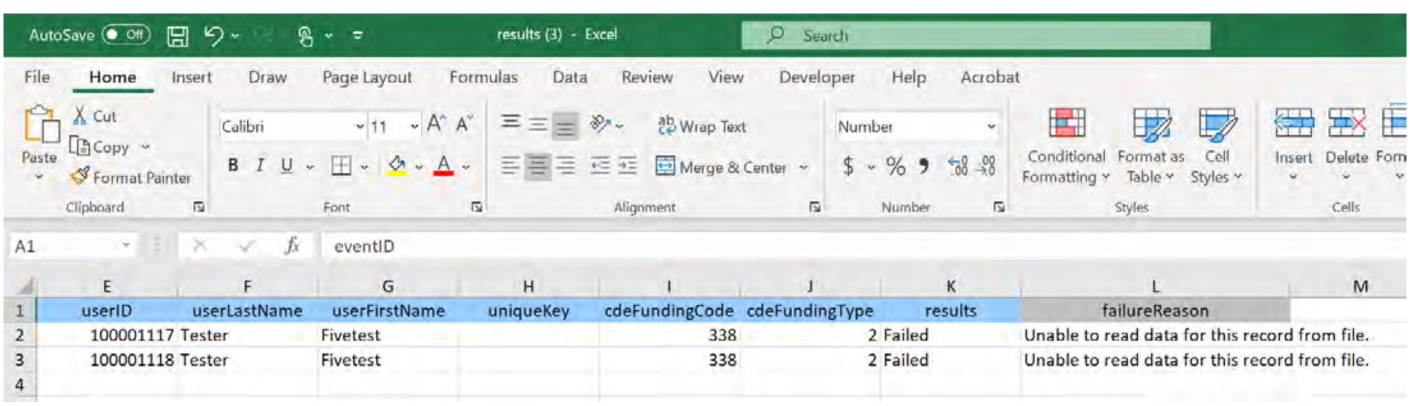
Only one file can be uploaded at any time, meaning you must wait until the last upload has “results” before adding another file.

You must download and save the Results file that is named with the data/time of upload. **Once you upload another file, this file will no longer be available.** Only the last file uploaded is available. The system does not save a queue of past uploads or Results. Please save your past upload files and results for reference. If you do not save the Results file you will not be able to reference if there was a failure to import.

If you receive a “failureResults”, one of the following will apply:

- Event ID not valid
- Event ID not associated with this sponsor
- Invalid cdeFunding Code or did not match Event funding code
- Event Date not valid or not valid format
- Event Date in the future
- User ID not valid
- User Name and ID mismatch
- Unable to read data for this record from file



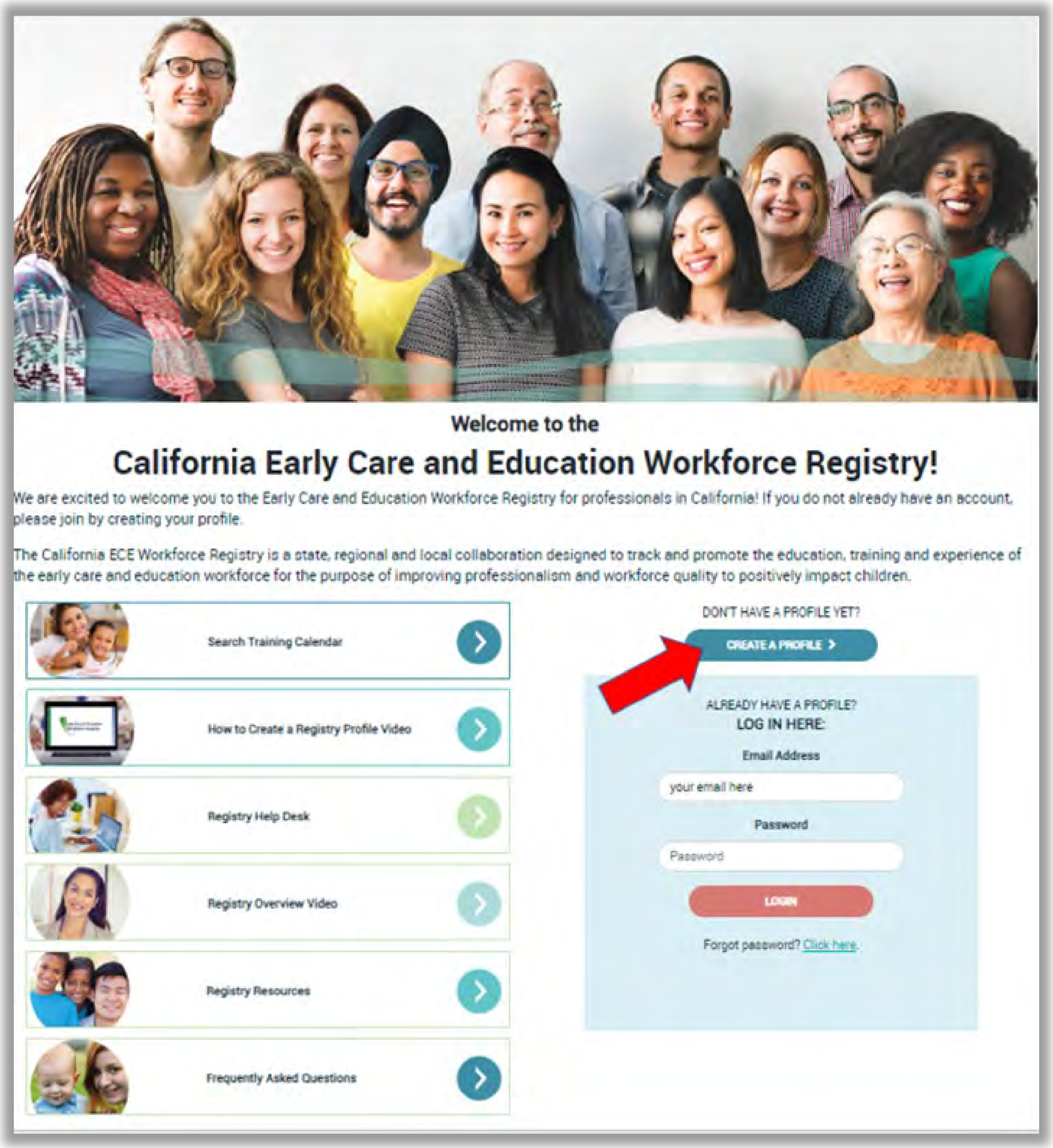


2.0 Instructors/Trainers

The first step to becoming an approved trainer/instructor with a sponsor organization is to have or create or update an existing Registry account.

2.1 Creating a Registry Profile

- An email address is required and will serve as the **User Name** upon login. The email address used to create your profile will be the same email address participants will use if they have questions regarding one of your trainings. ***Please use your work email address.***
- To create a profile, go to www.caregistry.org and click ***Create Profile.***



- **User Registration**
  This section asks for contact information including creating a password, demographic information and indicating language(s) spoken. Required fields are marked with an asterisk.
- **Employment Status**
  When choosing employment option in the second screen of the Registration page or updating employment status in the Registry
  - **Employees** - Trainers that are employees of the training/sponsor organization search by the name of the organization.
  - **Contractors/Self-Employed** - Trainers that are contractors, self-employed, will first select search by **Employer Name** and then search and select **Contractor.** (See screen shot on next page.) Do not use this option if you are a FCC provider.

If you have more than one role, and/or employer, or also owner your own center/FCC, please create two employment records. Most individuals utilizing the Training Module/Calendar will fall into the two categories below: Employed/Owner of a professional development organization or is a contracted instructor in a training organization. See screen shot on next page.

If you are also a FCC, or have another role, add another employment record when you log back in to capture your role in the field, including the number of hours you work, etc.

User Registration: Employment

Search for your current employer. If you don't find the employer on the first search, you may want to try again using different criteria.

Specific Search Categories

- Licensed Center, Public School site or Family Child Care (FCC) Home: Click **Select Employer/Business/State and Location** and **Search By** to start your search. When you select **Name**, type in the name of the licensed facility/school site where you work/own your business. You may also search by the **License Number** issued by Community Care Licensing, if applicable. When you locate your work site/status, press **Select**.
  FCCs: Search by Last Name, First Name of owner/operator or license number.
  Large Multi-Site Employer:Search and select the site where you spend most of your working hours.
  If you cannot find your center, school or family child care home or FCC employer, click **Please Select** then **Name** and **Select *Employer/Business not Found*** and type in your employer/business details. Registry staff will work to add the employer/business/ECE related business in the Registry and match you with your employer/business/FCC.
- Professional Development Organizations: If you are employed by a professional development provider, such as a resource and referral agency, **Select Employer/Business/State and Location** and **Search By**, select **Name**, then enter the name of that organization, then click **Search**. When you locate the organization, press **Select**.
- Unemployed: If you are unemployed, **Select Employer/Business/State and Location** and **Search By** and **Name**, type "unemployed" then click **Search** and then **Select**.
- Student Not Employed in ECE Field: If you are a student not employed in the ECE field, **Select Employer/Business/State and Location** then **Search By** then **Name**, type "student" in search field, then **Search** and then **Select**. If you are employed in ECE and also a student, please search for the facility/home/organization by following the instructions in **Licensed Center, Public School site, or Family Child Care (FCC) Home** above.
- License-Exempt Provider (Family, Friend, Neighbor = FFN): If you are a license-exempt provider (FFN), **Select Employer/Business/State and Location** then **Search By** then **Name** and type "license-exempt" in search field then **Search** and **Select** that option from the list. If you work in a licensed facility, or license-exempt school site, please follow Licensed Center, Public School or Family Child Care Home instructions above.
- Contractor (self-employed in support role for the ECE field, not FCC or FFN): This category is for individuals that may be hired by a professional development organization to conduct professional development, such as training, but is not an employee of that professional development organization. If you are a contractor, type "Contractor" in Search by Employer/Business Owned/Status and **Select** that option from the list. This is not intended for individuals that are employed and/or work directly with children and have an employment contract or for family child home operators/owners.

After making your selection close the box, complete the additional information, and **Save!**

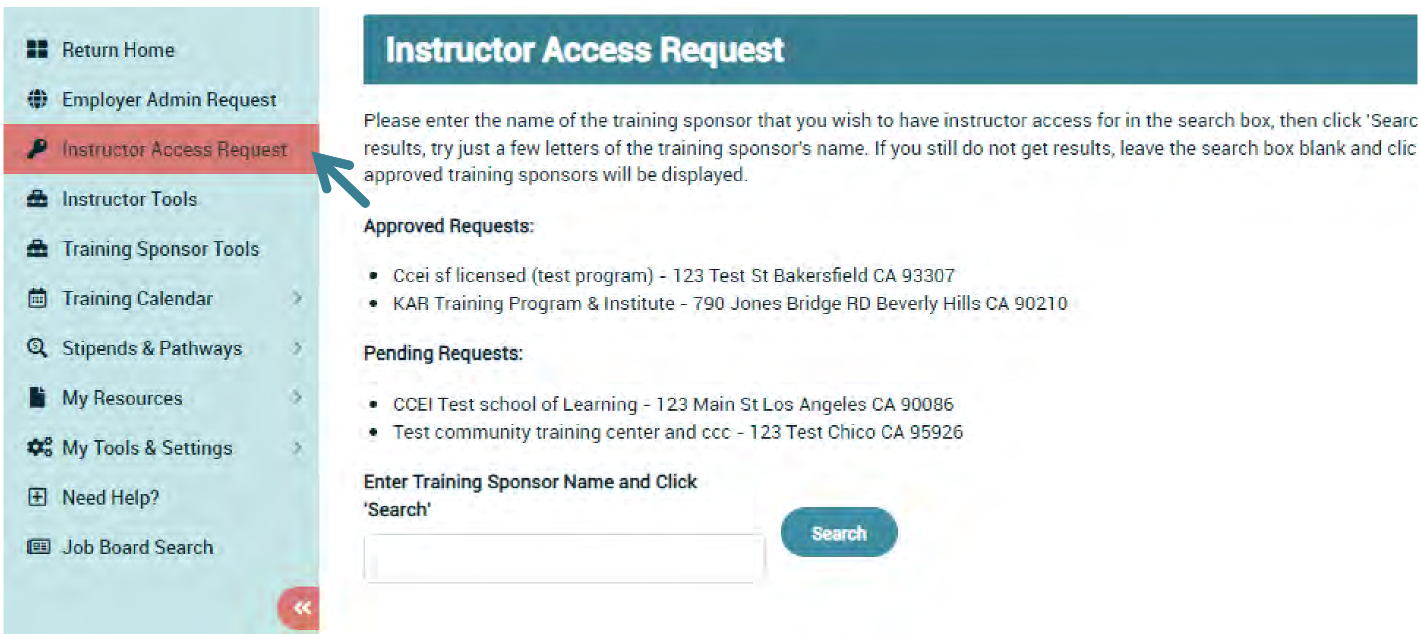
Search By *

Please Select

2.2 Instructor/Trainer Access Request

The **Contact Manager(s)** designated by Executive Directors, or equivalents, of Training/Sponsor Organizations approve all their instructors. Every Registry participant can request instructor access by clicking the link on the navigation bar entitled **Instructor Access Request**.

- Regardless of whether the trainer is an employee or a self-employed contractor, they must submit an **Instructor Access Request** and be approved by the training/sponsor organization to gain access to **Instructor Tools**.
- **Contact Manager** that are also trainers for the Training Sponsor/Organization, must submit **Instructor/Trainer Access Request(s)**, and approve request, to gain access to the **Instructor Tools**.



- Click the "Instructor Access Request" link, as shown, to access the request page.
  - Type in the name of the organization you want instructor access with and click "**Search**."
  - Click the circle next to the organization you choose and click "**Submit**".
  - Organization name will now appear in "Pending Requests".
  - At this point, your instructor request will be sent to the sponsor organization and will remain pending until the sponsor approves or denies your request. You will

receive an email once the sponsor processes your request informing you of the decision.

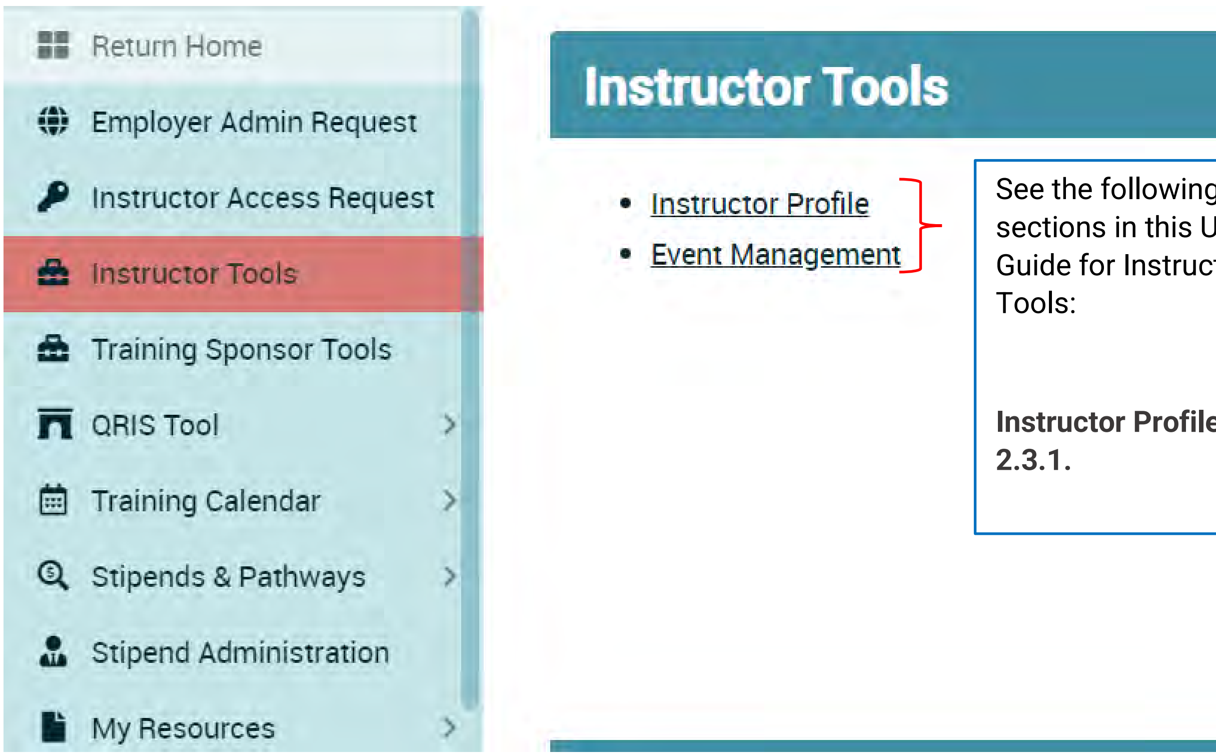
- If your request is denied, you will have the ability to request access again in the future.

Please note: There is no limit to the number of sponsor organizations an instructor can send a request to.

2.3 Instructor/Trainer Tools

If the sponsor approves your request for instructor access, your profile will include the “**Instructor Tools**” located on the navigation bar *(see screenshot below)*.

The instructor will have access to **Instructor Profile** and **Event Management**.



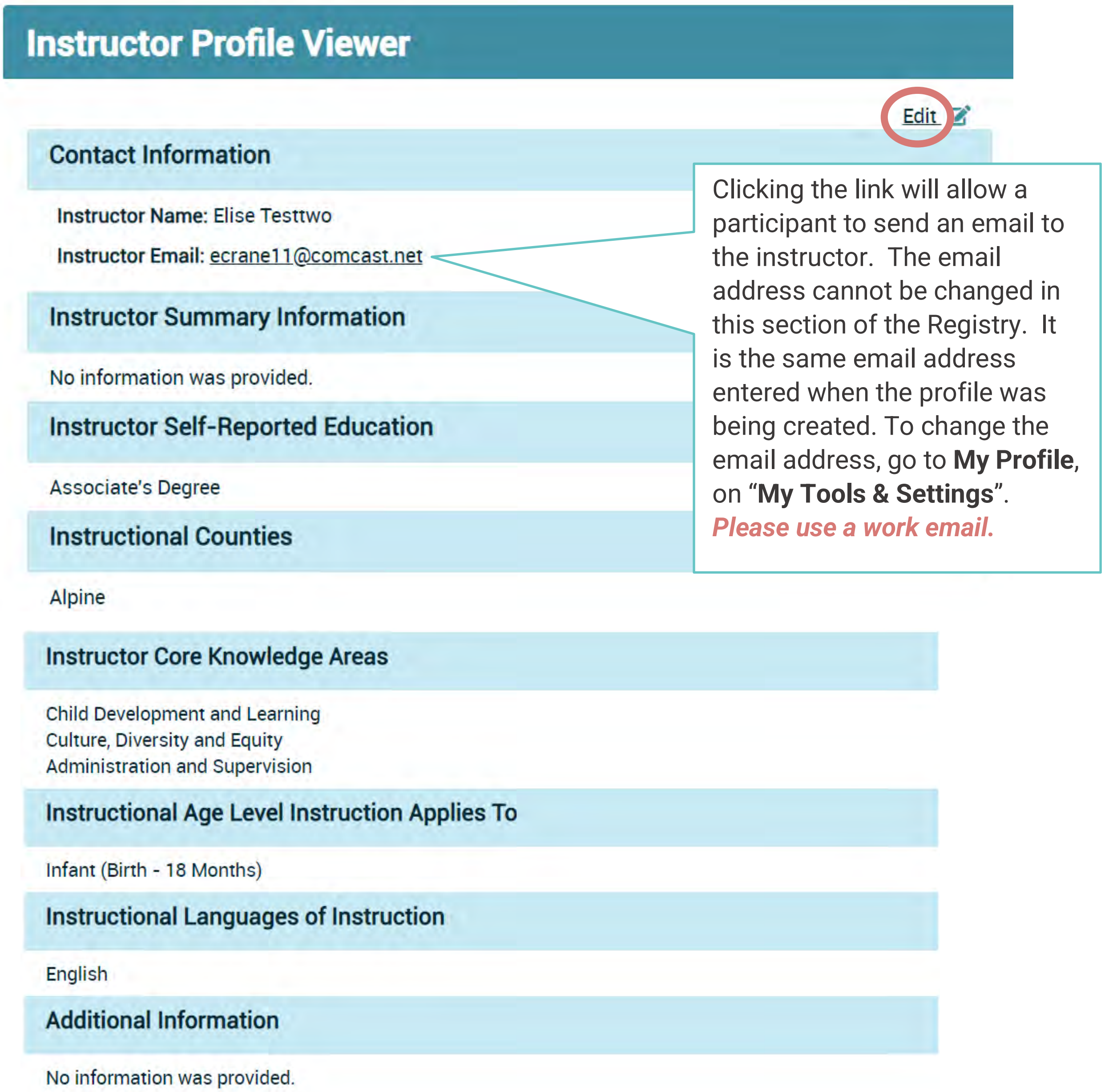
See the following sections in this User Guide for Instructor Tools:

Instructor Profile = 2.3.1.

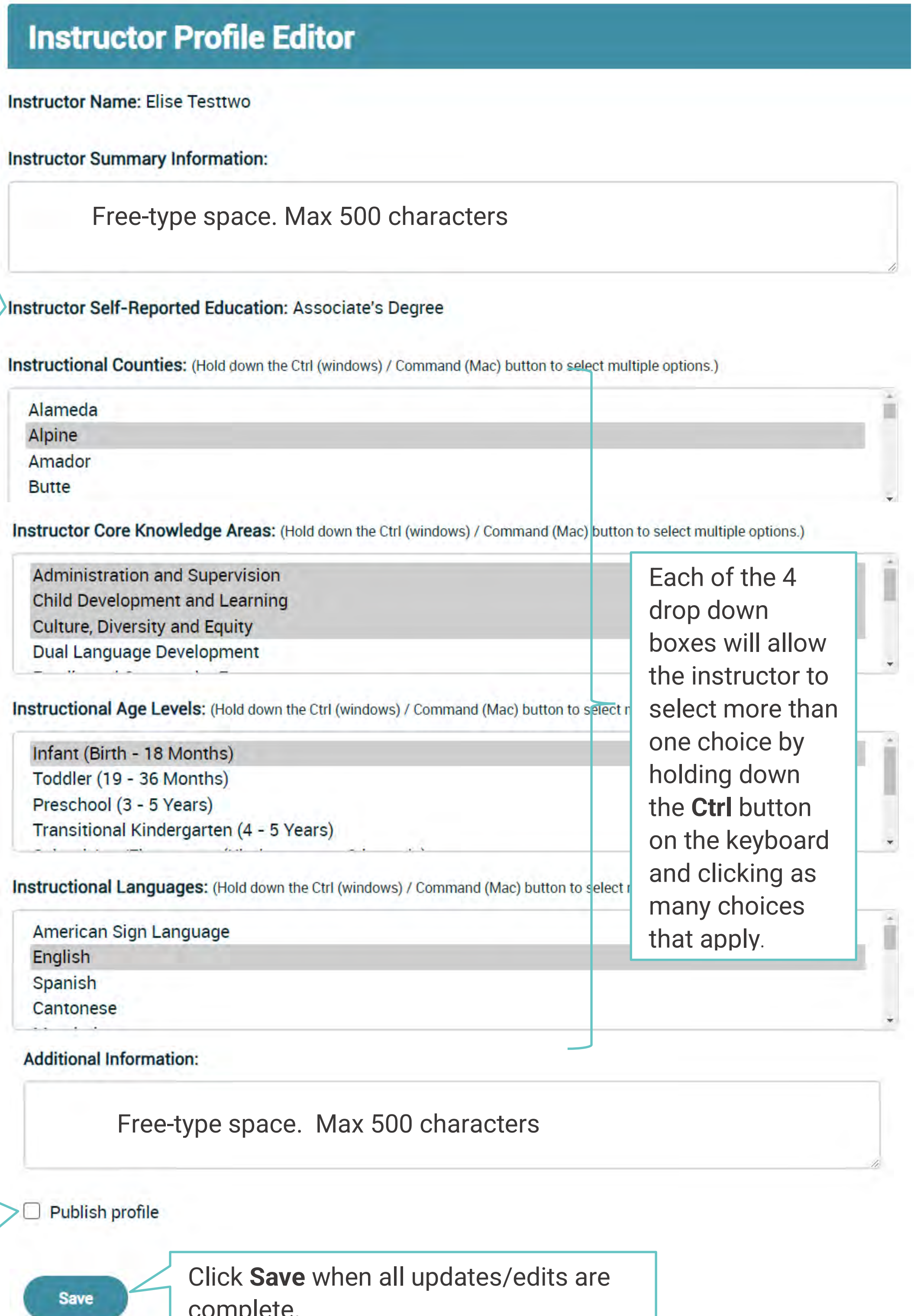
2.3.1 Instructor/Trainer Profile

The instructor must complete the profile page. Some of the information is pulled and populated from the instructor's profile; other information is typed in. Click the Instructor Profile link *(as shown in the screenshot above)* to access the Instructor Profile Viewer.

- To add or change information in the Instructor Profile Viewer, click "**Edit**" at the top right corner.



- Upon clicking **Edit**, the following **Instructor Profile Editor** screen will appear



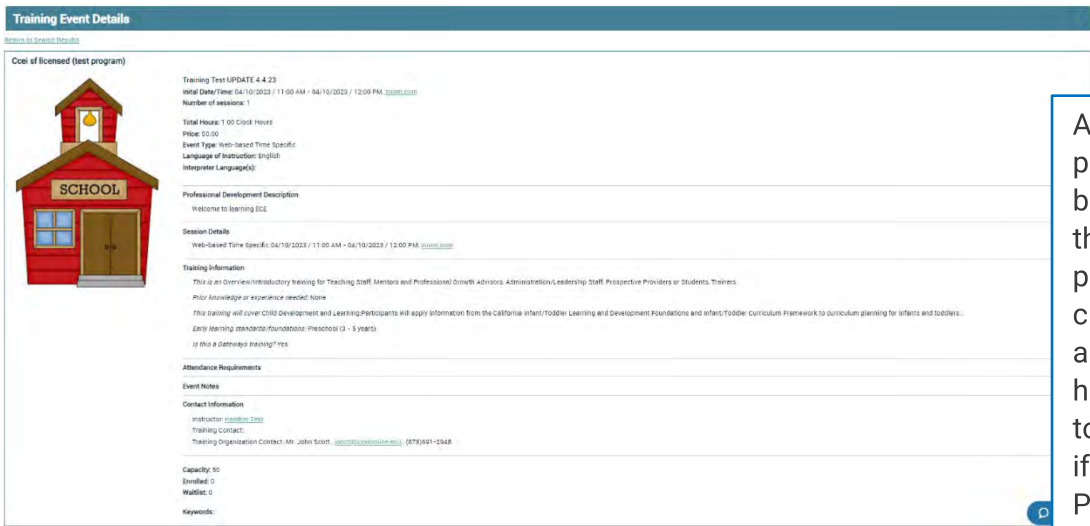
The Instructor Name and Instructor Self-Reported Education fields are prepopulated from the personal profile page completed during registration. These fields cannot be changed from this screen. To change these 2 fields, the information must be edited from the personal **My Profile** screen.

Each of the 4 drop down boxes will allow the instructor to select more than one choice by holding down the **Ctrl** button on the keyboard and clicking as many choices that apply.

When the **Publish Profile** box is checked, all participants will be able to see your profile once you have posted a training to the calendar that you will instruct.

Click **Save** when all updates/edits are complete.

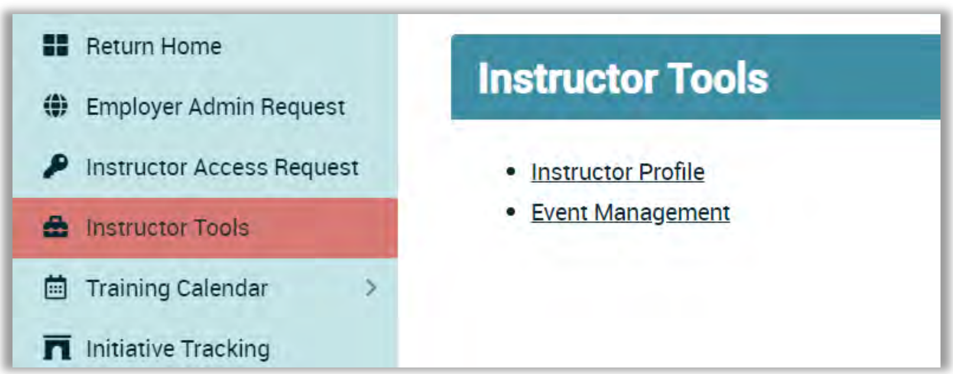
- When a participant searches for trainings, he/she will be able to see the instructor profile by clicking on the Instructor Name, if the profile is published:



Any Registry participant will be able to see the instructor profile by clicking here on any training that has been posted to the calendar, if the "Publish Profile" box was checked by the instructor.

Event Management: The Event Management section for instructors is the same as for sponsors. Click the **Event Management** link in the Instructor Tools to access this section (1.1.6.) for step-by-step instructions on how to add an event to the calendar, email enrollees, change enrollment status for enrollees, manually add non-enrolled participants, manually enter payment information, view/print the training roster, view/print a sign-in sheet, and update enrollees attendance status once they have completed the training.

- Only the **Contact Manager(s)** can **edit training information** once entered into the Registry.



3.0 CDE-EESD/First 5 CA Training Vendors

The foundation for replacing the paper Direct Service Profile Form (long and short) relies on the ability of the CA ECE Workforce Registry to capture trainee and training data. The goal of automating the reporting is to reduce the burden on training providers, increase data available for State funders, and provide real time training data for trainees, their employers and county administrators of CA-QRIS and other local initiatives. The Direct Service Profile Report Template outlines the coding structure needed to ensure consistency in data and an annual analysis of the status of professional development experiences of individuals provided by training organizations funded with state funding. The data elements are identified and refined in this section, as well as how to utilize the Registry to apply State funding streams.
The tables below display a breakout of the methodology of the three-unit coding system; PD Delivery Type, Delivery Method, CDE/First 5 CA Funding or Fee-for-Service (external funding used to supplement the cost of providing the training) that will populate on the **Direct Service Profile Report – Training Orgs - CDTC** in the required coding format:

PD Delivery Type	
Name	Code
Training	1
Trainer-of-Trainer (TOT)	2
Technical Assistance	3
Coaching	5
Mentoring	6

Delivery Method	
Name	Code
Classroom/Face-to-Face	0
Online/Web-based	4

CDE or F5CA or Fee-for-Service	
Name	Code
CDE/COE/F5 CA	0
Fee-for-Service	8

Definitions of Professional Development Delivery Types[1]:

- **Training**: Training refers to participant-specific career or professional development support.
- **Trainer-of-Trainer (TOT)**: TOT refers to training provided to individuals who will in turn train others on the specific subject matter.
- **Technical Assistance**: Technical assistance is the provision of targeted and customized support by a professional(s) with subject matter and adult learning knowledge and skills to develop or strengthen processes, knowledge application, or implementation of services by recipients.

[1] Training and Technical Assistance Glossary, a joint project of National Association for the Education of Young Children (NAEYC) and National Association of Child Care Resource & Referral Agencies (NACCRA) 2011.

- **Coaching**: Coaching is a relationship-based process led by an expert with specialized and adult learning knowledge and skills, who often serves in a different professional role than the recipient(s). This includes coaching done via telephone or email.
- **Mentoring**: Mentoring is a relationship-based process between colleagues in similar professional roles, with a more experienced individual with adult learning knowledge and skills, the mentor, providing guidance and example to the less-experienced protégé or mentee.

Definitions of CDE/First 5CA and Fee-for-Service:

- **CDE/First 5CA:** Refers to trainings that are fully funded by CDSS or First CA (or First 5 County).

  If the training if funded by First 5, you will need to have access to the First 5 code in your CDE/F5CA Program Name. Contact Christina.waterman@ccala.net to add CDE/F5CA Program Name codes to your organization.

- **Fee-for-Service**: Refers to training or services provided at cost that are above and beyond the level of service funded by CDE. This category is intended to capture data on unfunded need for California residents.

Code Format

The Direct Service Profile Report consists of the data that is included on the Long and Short forms that individuals used to fill out and submit for each training. This data was then inputted into an Excel spreadsheet based on a defined coding structure.

The ORGCODE consists of the following information:

Vendor Number (i.e. 1234)
+ CDE/F5CA Program Code (i.e. 01R)
Professional Delivery Type (1 = training)

3-digit code

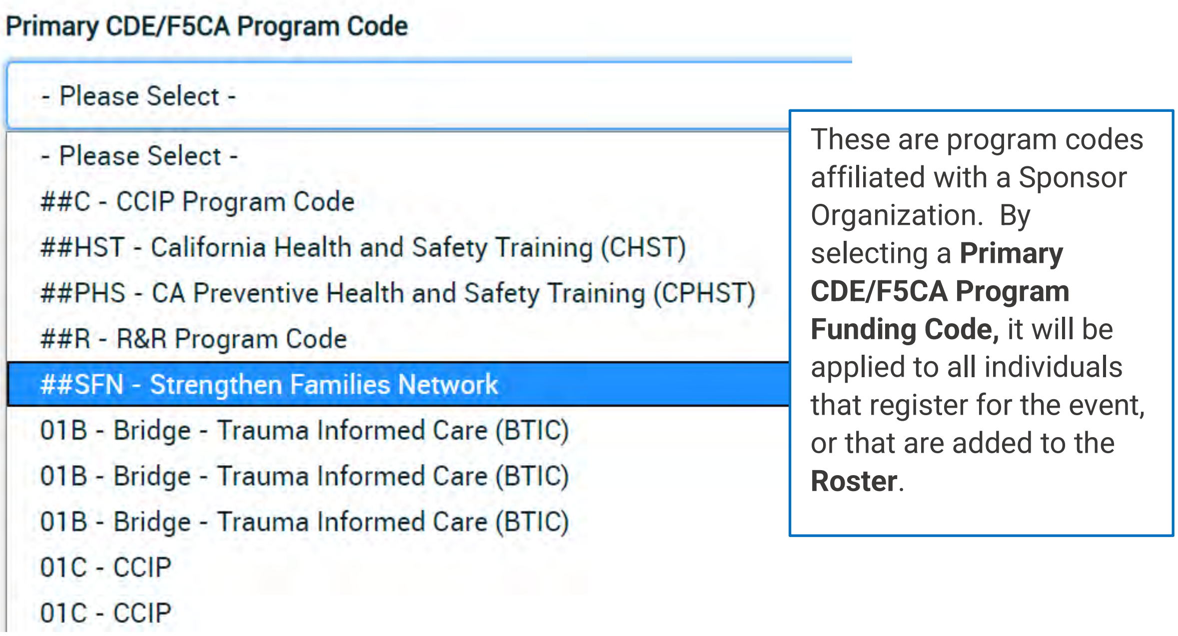
A. **Vendor Number**: Organizations that receive funding from the California Department of Education – Early Learning & Care Division (CDE-ELCD) or First 5 CA, must have a **Vendor Number** on file with the CA ECE Workforce Registry. If an application for the CA ECE Workforce Registry Training Module/Calendar was submitted and processed, and organization staff already have access to **Training Sponsor Tools** on the Registry, your organization already has a vendor number on file.

B. **CDE/F5CA Program Code**: Another critical component for state reporting utilizing the Registry is the **CDE/F5CA Program Code**, typically a 3-digit code. Below are some examples of program codes (## represents a two digit county code – DO NOT use "##" on your Registry account):

- ##R = County Number + Resource and Referral
- ##C = County Number + Child Care Initiative Project [CCIP]
- PIN = California Preschool Instructional Network (CPIN)
- PIT = Partnership Infant/Toddler Care (PITC)
- ##HST = County Code + California Health and Safety Training (CHST)

The program codes are stored in the organization program profile. The codes are visible and are applied during the set-up of a new Event by selecting **Primary CDE/F5CA Program Code**. Select which code you predict will apply to most training participants. The **CDE/F5CA Program Codes** can later be applied at the individual level, for organizations that may apply more than one code for specific types of events.

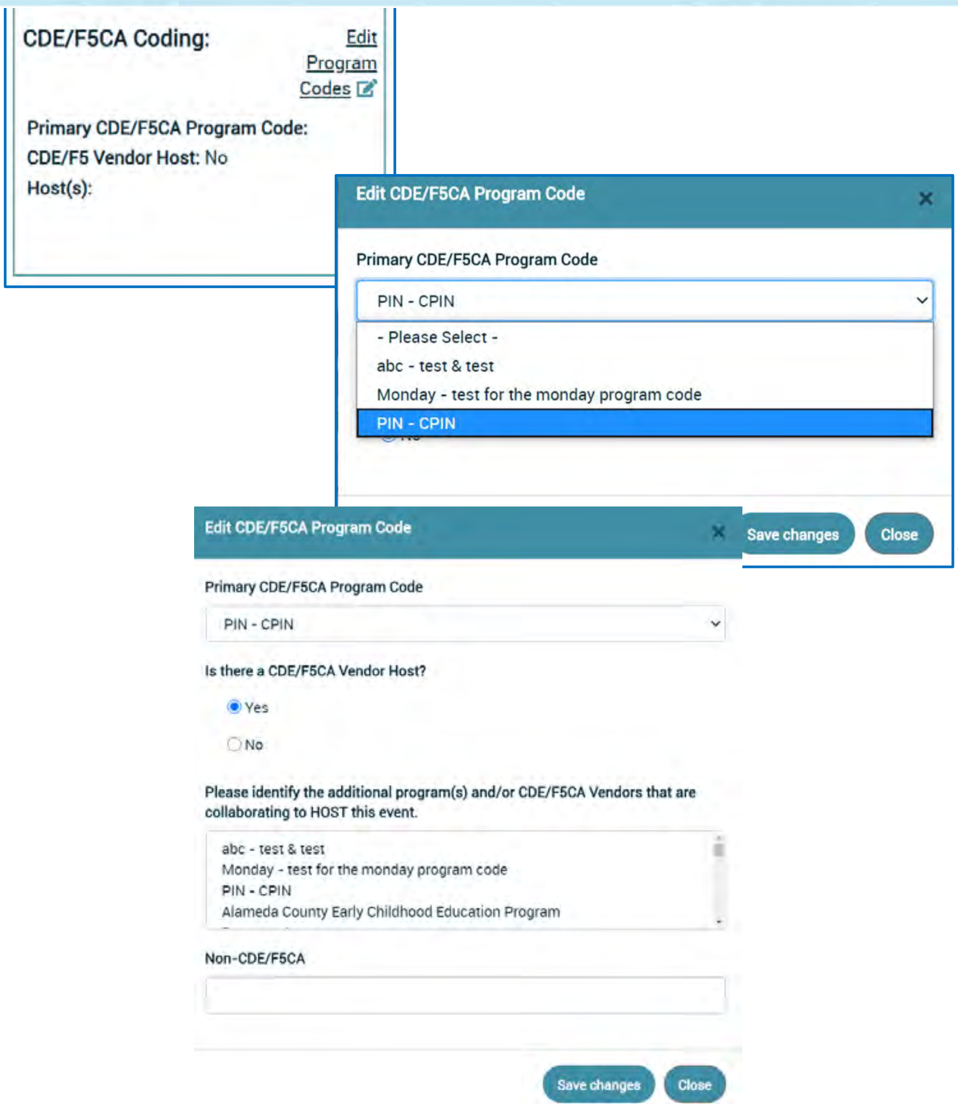
In order for the Registry to be flexible for multiple types of users the **Primary CDE/F5CA Funding Code** is not a required field. CDE/F5CA professional development contractors may also provide professional development that is not funded by State funds. If the PD activity IS funded by the State, it is important to set the **Primary CDE/F5CA Program Code** when initially setting up the Event.



The Primary CDE/F5CA Program Code can be added later, however, applying the code after the initial set up of the Event will require additional steps, see below:

Step 1: Go to **Training Sponsor Tools**
Step 2: Go to **Event Management**
Step 3: Select Event to edit and click **View**
Step 4: Scroll down to **CDE/F5CA Coding** and select **Edit**
Step 5: Use the drop-down menu to select **Primary CDE/F5CA Program Code** and **Save changes**.
Step 6: If applicable, also select **Yes** and choose a **Vendor Host and Save changes.**
Go to **Roster**, **CDE/F5CA Attendee Coding** to apply codes to attendees.

Event Date	Training Name	Event County	# Enrolled	# Attended	Training Sponsor	Published	Delete	View	Roster
07/10/2020	Making Math fun for preschool children (test training)		0	0	Nirmala Test School no funding in program	No			



STEP 3 Select **View**

STEP 4 Select **Edit Program Codes**.

STEP 5 Use drop-down menu to select Primary CDE/F5CA Program code.

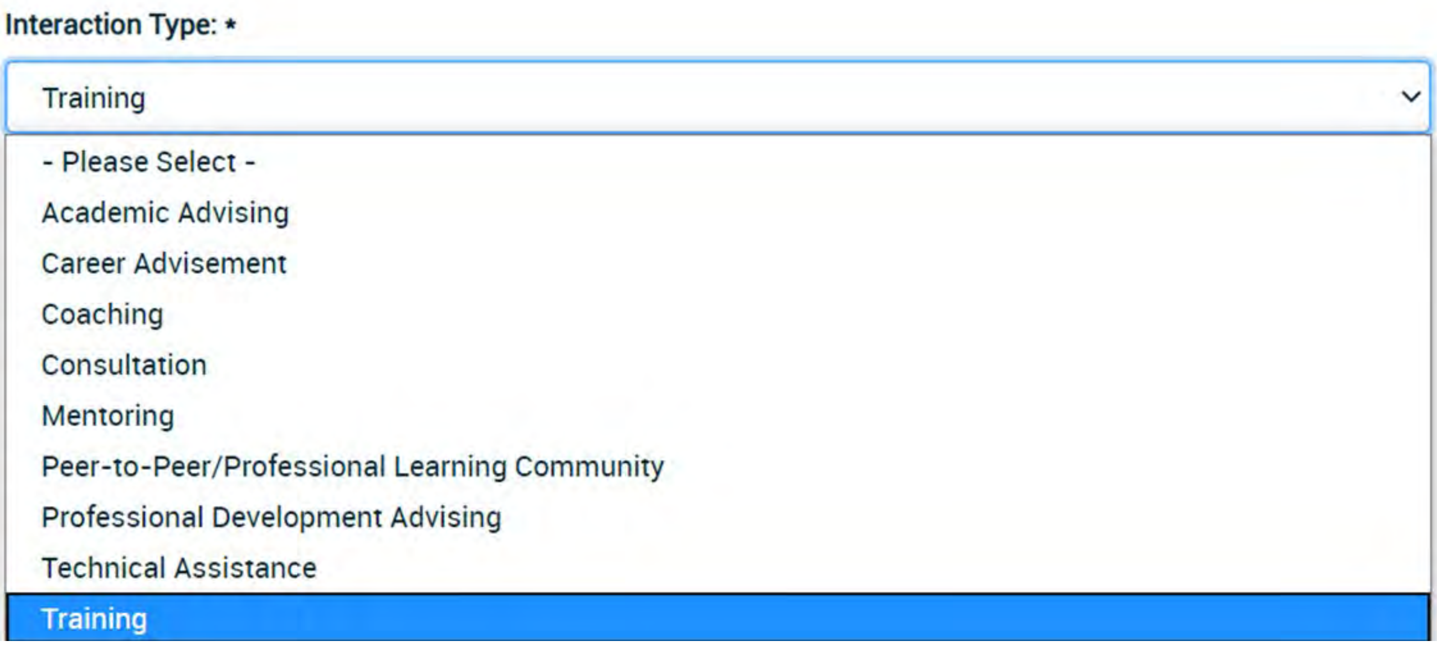
STEP 6 Click Yes for Host and use drop-down menu to select Host(s) and click **Save changes**.

LAST THREE-DIGITS OF ORGCODE

FIRST DIGIT: PROFESSIONAL DEVELOPMENT DELIVERY TYPE

1. **Applying Professional Development Type Code**: The professional development types are derived from **Add Trainings, Interaction Type** and **Event Management, Add Event,** and **Intended Audience**.

   a. **Interaction Type**: When the training is set up, an **Interaction Type** is applied.

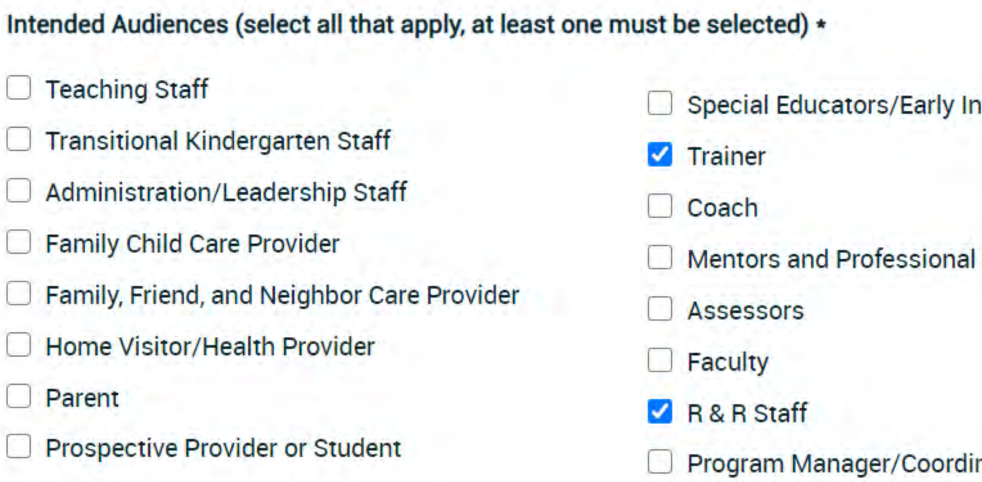


The selection of an **Interaction Type**, triggers a **Professional Development Delivery Type Code** for Training, Technical Assistance, Coaching and Mentoring.

PD Delivery Type	
Name	Code
Training	1
Trainer-of-Trainer (TOT)	2
Technical Assistance	3
Coaching	5
Mentoring	6

b. **Intended Audience**: When the event is set up, the **Event Type** and **Intended Audience** triggers **PD Delivery Type Code** for Trainer-of-Trainers.

i. **Trainer-of-Trainers**: The PD Delivery Type is derived by selecting **Trainer** or **Faculty** in **Intended Audience**.

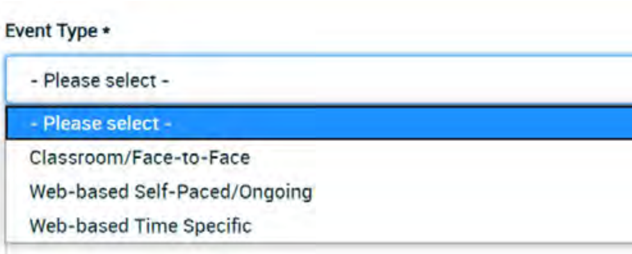


DO NOT select everyone you think will be at the training; only select the audience that the training and curriculum is designed for (even if an audience could benefit from the training, for example, parents, if they are not the intended audience, do not select).

- **Intended Audience**: is designed to target the audience for trainee search and based on content type of the training. For example, Trainer-of-Trainer, is a different type of curriculum than a training for a child development teacher working in a classroom directly with children. Avoid clicking all the boxes.

<u>SECOND DIGIT: DELIVERY METHOD</u>

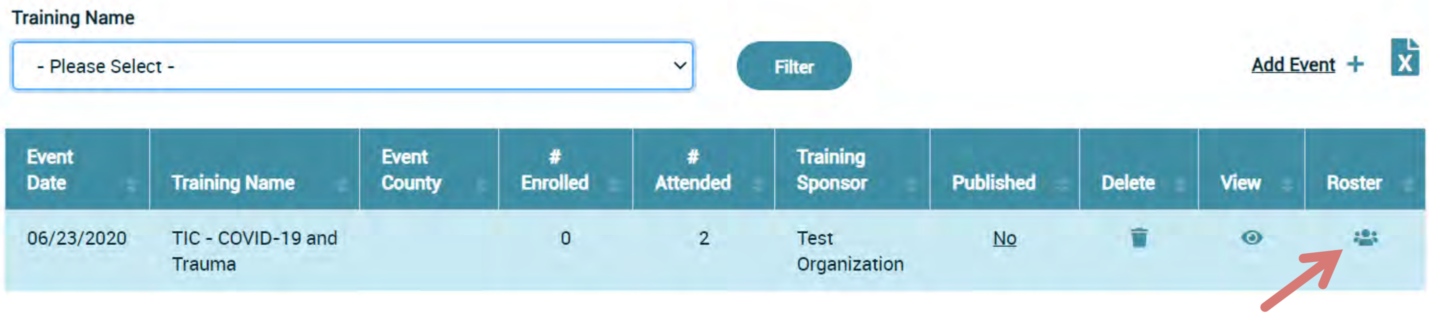
2. **Applying Delivery Method**: The delivery method types are derived from **Add Event** data.
   a. **Event Type**: When the **Event Type** is applied which generates a code when the **Primary CDE/F5CA Program Code** is applied at event set-up. For example, when **Web-based Self-Paced/Ongoing** or **Web-based Time Specific** is selected the Delivery Method 4 will be applied to the **Direct Service Profile Report - CDTC Format** located in **Sponsor Tools** in **Reports**.



Delivery Method	
Name	Code
Classroom/Face-to-Face	0*
Online/Web-based	4

<u>THIRD DIGIT: CDE/F5CA or FEE-FOR-SERVICE</u>

3. **Applying CDE/F5CA** or **Fee-for-Service**: These funding codes are applied at the individual level when confirming attendance in the Roster.
   a. **Event Management, Roster**: The Roster can be accessed by clicking the icon below the Roster header. After the event, attendees can be added and/or the attendance can be verified and CDE/F5CA program and funding codes applied. These codes will populate the Direct Service Profile Report – CDTC Format located in **Training Sponsor Tools, Reports.**

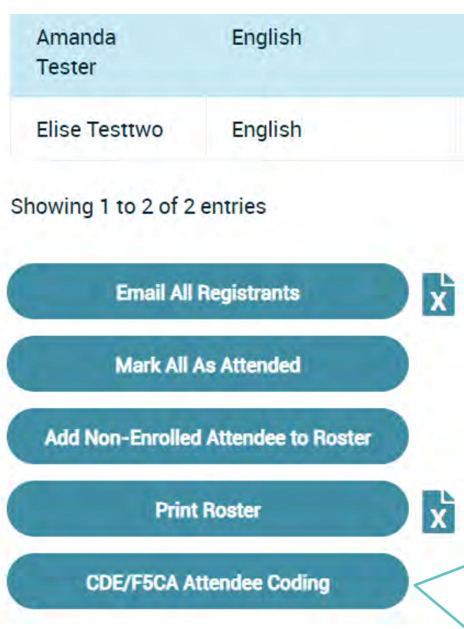


STEP 1:

Make sure that all attendees are on the **Roster**.

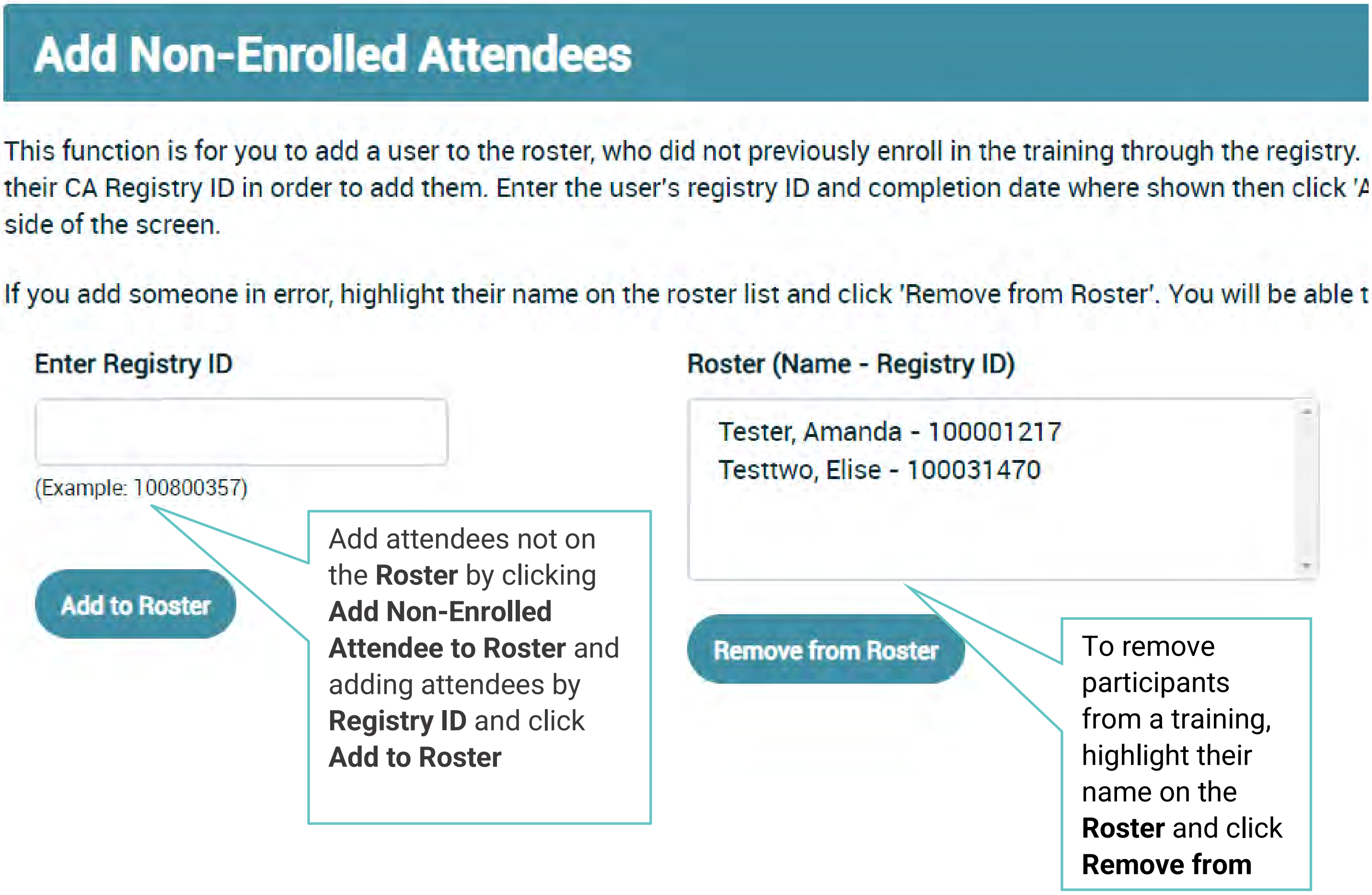
STEP 2:

Add attendees not on the **Roster** by clicking **Add Non-Enrolled Attendee to Roster** and adding attendees by **Registry ID**.



The program codes are assigned by CDE-ELCD/F5CA and are affiliated with a Sponsor Organization. For example, by selecting 19R the **Primary CDE/F5CA Program Funding Code** will be applied to all individuals that register for the event, or that are added to the **Roster**. Individuals that do not fit that program funding stream can be edited in **CDE/F5CA Attendee Coding**.

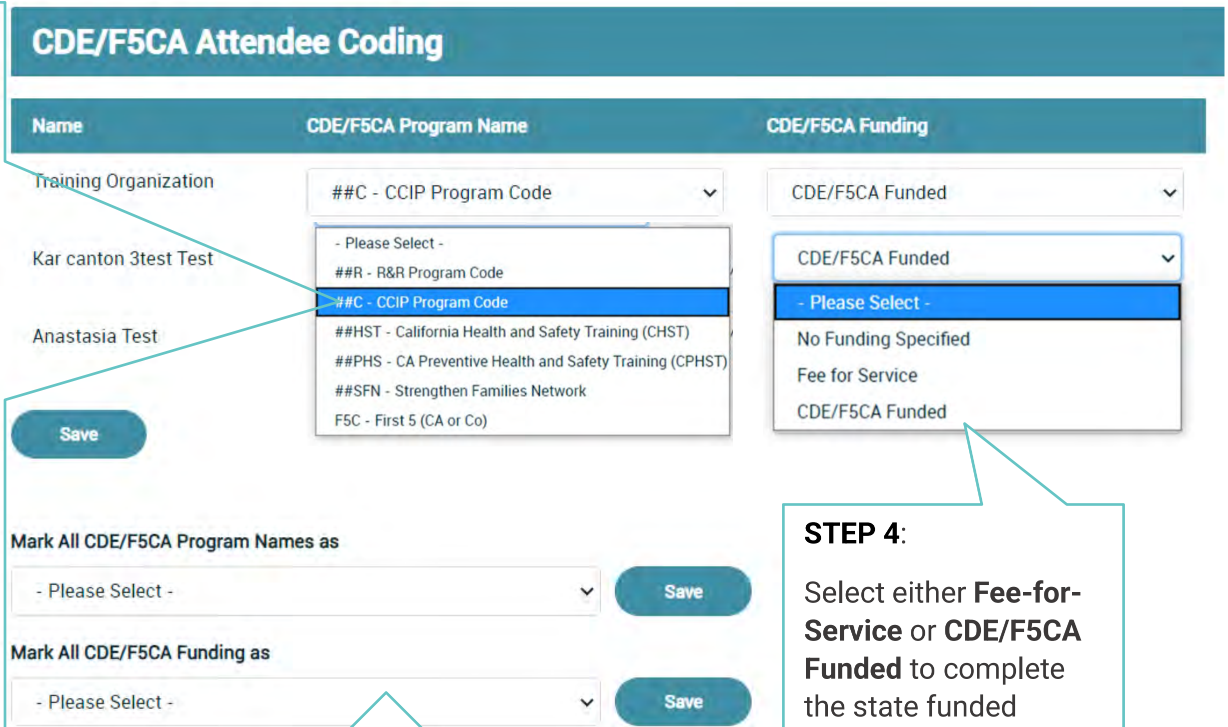
After clicking **CDE/F5CA Attendee Coding** button on the bottom of the **Roster** page, this screen appears that displays the program codes and CDE/F5CA funding options: CDE/F5CA Funding or Fee-for-Service (8).


Add Non-Enrolled Attendees
This function is for you to add a user to the roster, who did not previously enroll in the training through the registry. their CA Registry ID in order to add them. Enter the user's registry ID and completion date where shown then click 'A side of the screen.
If you add someone in error, highlight their name on the roster list and click 'Remove from Roster'. You will be able t
Enter Registry ID
(Example: 100800357)
Add to Roster
Roster (Name - Registry ID)
Tester, Amanda - 100001217
Testtwo, Elise - 100031470
Remove from Roster
Add attendees not on the **Roster** by clicking **Add Non-Enrolled Attendee to Roster** and adding attendees by **Registry ID** and click **Add to Roster**
To remove participants from a training, highlight their name on the **Roster** and click **Remove from**

STEP 3:

If all of the attendees are from the same **CDE/F5CA Program Code**, skip to the **CDE/F5CA Funding** column.

If there are some individuals that belong in another program, such as **CCIP,** click the drop down menu to select from all available codes.



STEP 4:

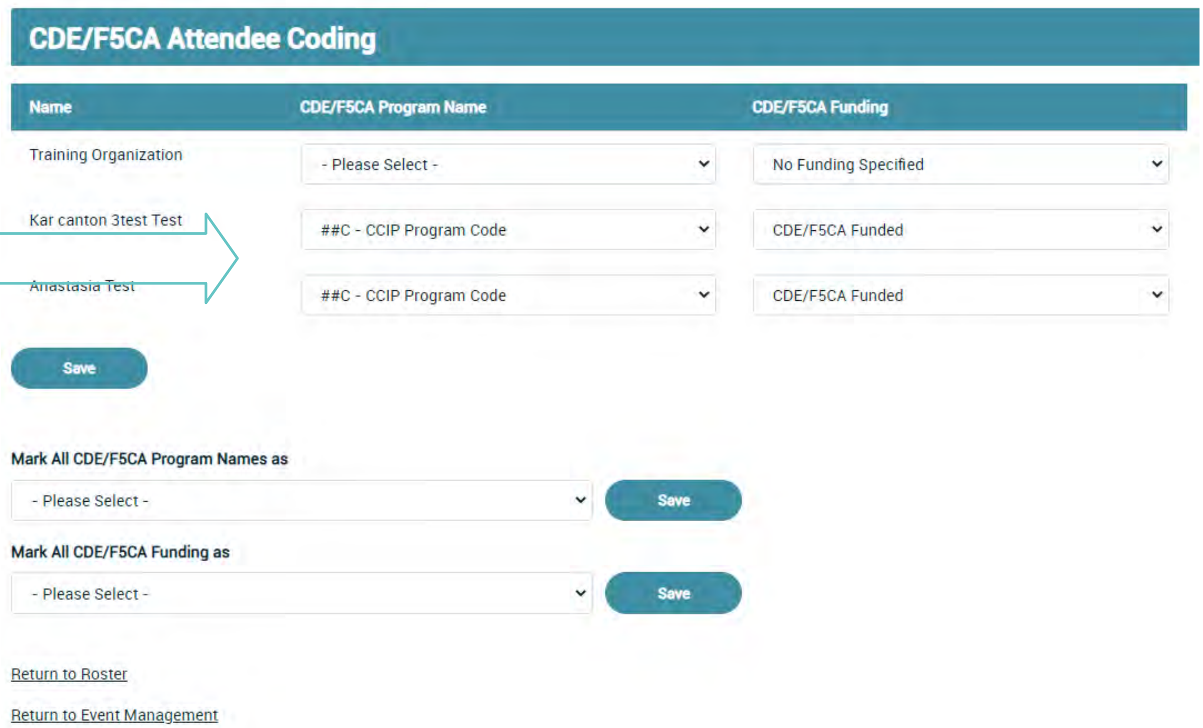
Select either **Fee-for-Service** or **CDE/F5CA Funded** to complete the state funded program coding. Default value is **CDE/F5CA Funded** which will apply zero (0) to the end of the **ORGCODE** for the Direct Service Profile Report. If you select **"No Funding Specified"** this data will not be included in the DSPR.

If the **Primary CDE/F5CA Program Code** that was used for the event is the majority of attendees, the code can be changed for all attendees using **Mark All CDE/F5CA Program Names as** and click **Save**, and if a few are another source, they can be changed manually.

All **CDE/F5CA Funding** can also be changed using **Mark All CDE/F5CA Funding as** and click **Save** to apply to attendees and manual changes can be applied to attendees that fit a different funding category.

If there are attendees that are in a primarily CDE/F5CA training that is covered wholly by a different funding source, the CDE/F5CA Program Name and CDE/F5CA Funding codes can be removed, see image below. The purpose of applying funding codes is to report the data to the CDE/F5CA for state sponsored events and attendees.

To remove an individual from the **Direct Service Profile Report**, select the blank option in **CDE/F5CA Program Name** and **No Funding Specified** in **CDE/F5CA Funding.**



4. Contact Us

Registry Training Module/Calendar Support:

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For participant questions email: https://ccala.zendesk.com/hc/en-us/requests/new

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