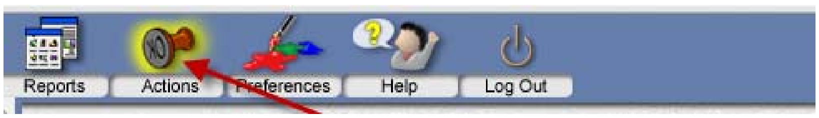
Clinical Education & Professional Development
Duke University Health System

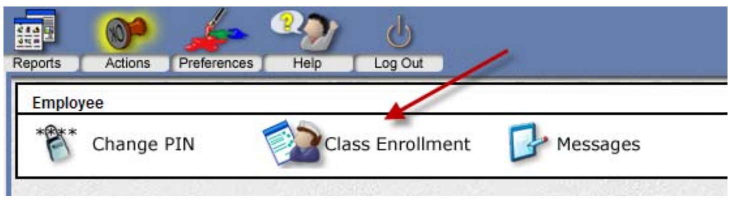
Class Registration via EdTrack

Log into the Time & Attendance site via the Intranet or at https://time.oit.duke.edu/APIHealthcare. Use your NETID and password to log in.

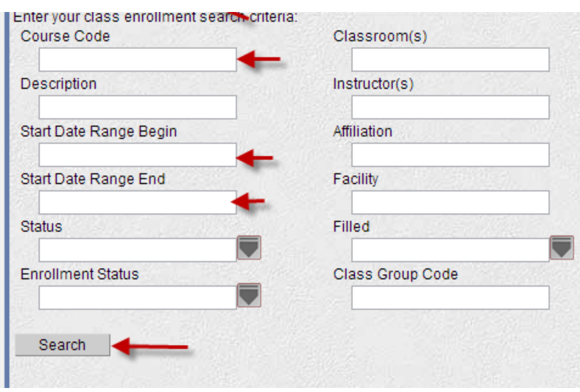
1. From the welcome screen, click on the **Action** button.



2. Click the **Class Enrollment** button under Employee section

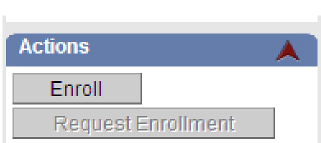


3. Enter the **Course Code** (course codes are generally included on communications, flyers)
   a. WHEN USING INTERNET EXPLORER IT MAY TAKE 3-5 MINUTES FOR THE COURSE LIST TO POPULATE ON THE RIGHT SIDE OF THE SCREEN. ONCE THE LIST APPEARS, TYPE THE COURSE CODE INTO THE TEXT BOX.
   b. Enter a **Start Date Range Begin and a Start Date Range End**
   c. You can also leave the course code blank and get a list of all the courses available during the indicated date range.
   d. Click **SEARCH**

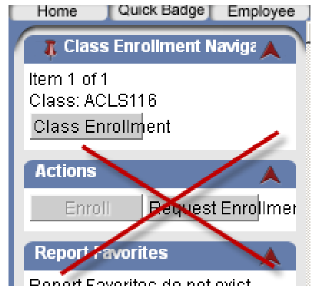


   e.

4. Click on the **yellow folder** to open the details of the class. If you do want to enroll, click on the **ENROLL** button on the left hand side.



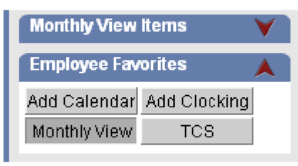
IF YOU SEE REQUEST ENROLLMENT, the class requires that you call in order to register for the class. A Request Enrollment DOES NOT guarantee that you are enrolled in the class so please do not use that option. CALL 684-4293 TO REGISTER FOR THE CLASS.



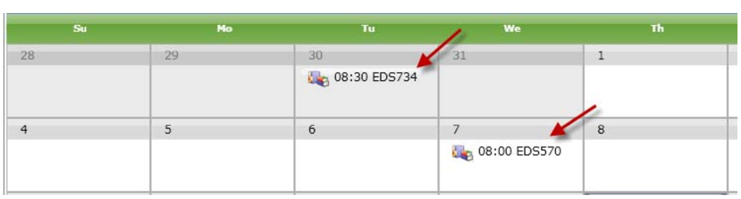
To Withdraw from a scheduled class that is NOT LIMITED.

IF YOU WISH TO WITHDRAW FROM A CLASS THAT HAS A STATUS OF LIMITED, YOU MUST CALL 684-4293 AT LEAST SEVEN (7) DAYS PRIOR TO THE CLASS. IF YOU CANNOT ATTEND THE CLASS DUE TO ILLNESS OR HAVING TO STAFF ON THE UNIT, PLEASE CALL 684-4293 AND NOTIFY YOUR MANAGER.

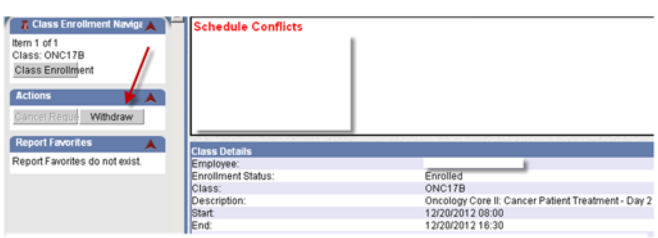
1. Login to Time & Attendance web site.
2. Click Monthly View under Employee Favorites.



3. Navigate to the month and day for the class.
4. Click the class information on the day you wish to withdraw.



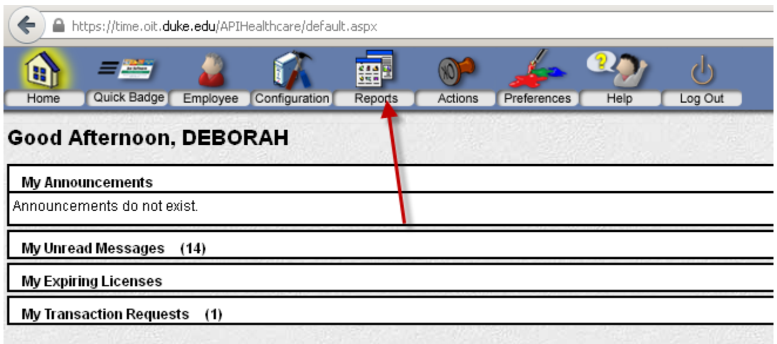
5. Click the Withdraw button once you confirm it is the correct class.



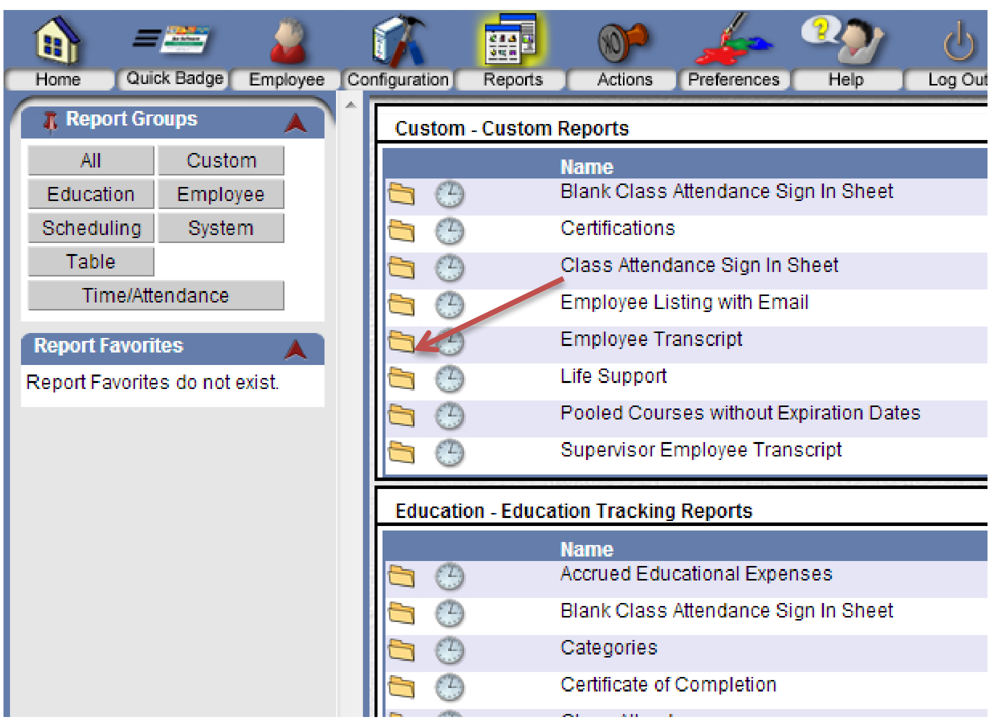
Employee Transcript Report – Allows the employee to run their own education report

Login in to EdTrack at https://time.oit.duke.edu/apihealthcare/.
Credentials are your NetID and password.

To run Employee Transcript, click the Reports icon.



Under Custom Reports, click the folder beside Employee Transcript



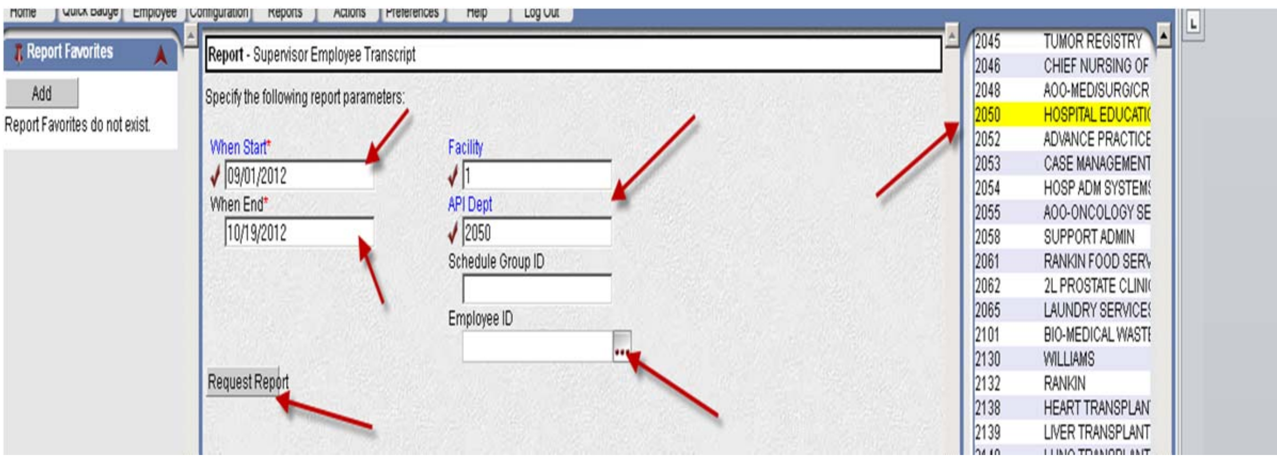
Enter the beginning date and end date. Leave Display Records to ALL.

Click Request Report.

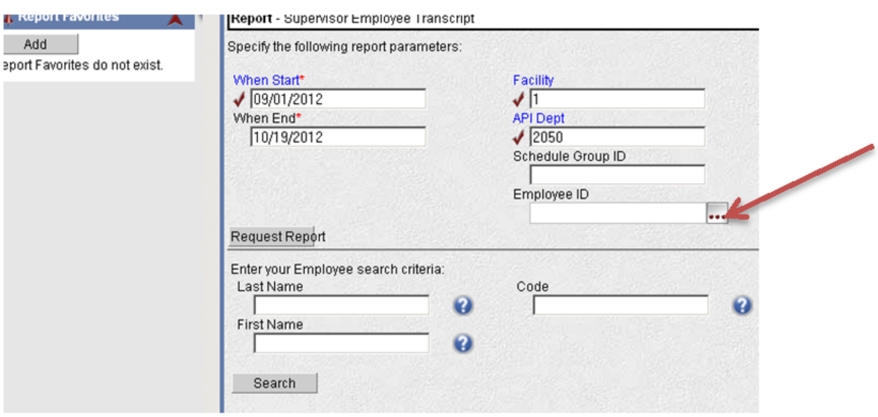
Supervisor Employee Transcript

Under Custom Reports, click the folder beside Supervisor Employee Transcript

Enter the Start Date and End Date for you report.
Enter Facility and your API Dept information.
Click Request Report.



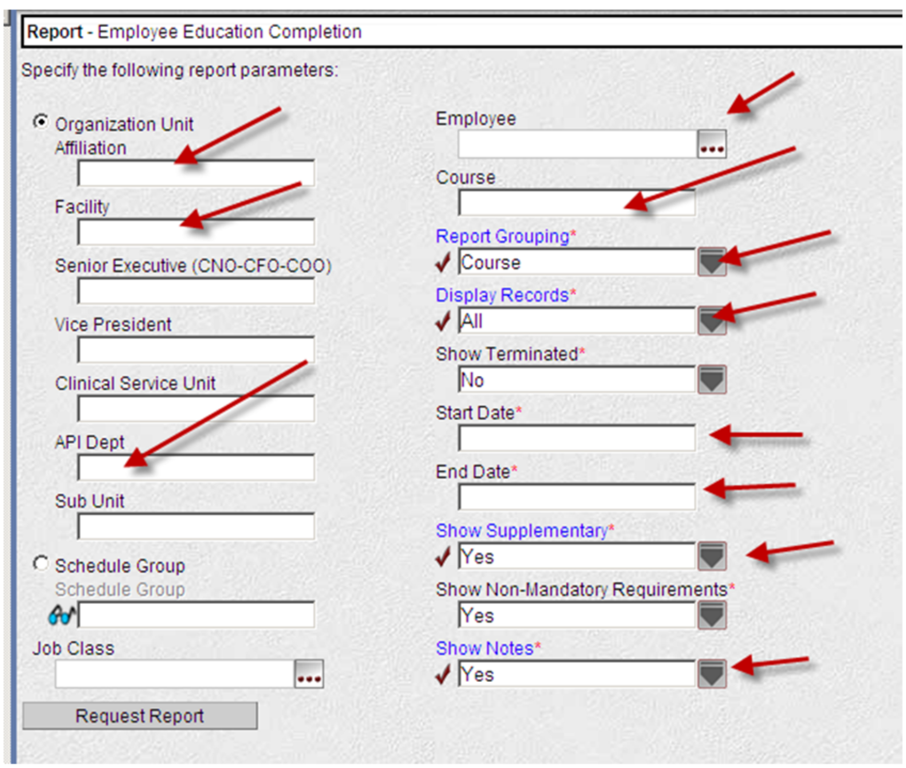
If you want to run a report for one employee, click the ellipses button beside Employee ID and search for employee. Click the folder beside the employee you need for the report. Be sure to enter date range. Click Request Report



Employee Education Completion Report – best used to check a specific course attendance

Click on Reports icon. Click on the Employee Education Completion report folder.

1. Click in the Facility box and select facility that is listed on right side of screen.
2. Enter your department number in the API Dept box.
3. Click in the Course box and select the course number from the list that populates on the right side of your screen.
4. Select Course in the Report Grouping box.
5. Select All in the Display Records box.
6. Select Yes in the Show Terminated if you want terminated employees to be included in the report.
7. Enter Start Date and End Date
8. Select Yes for Show Supplementary.
9. Choose Yes for Show Non-Mandatory Requirements.
10. Choose Yes to Show Notes
11. Click Request Report
12. Once the report opens, you can print the report or export.



To run for one employee, you do not need to enter the facility and department. Just click the employee search button (the ellipse beside the employee field) and find the employee. Fill in the other sections as above. Click Request Report.

Custom Pooled Reports

Custom Pooled Reports consist of:

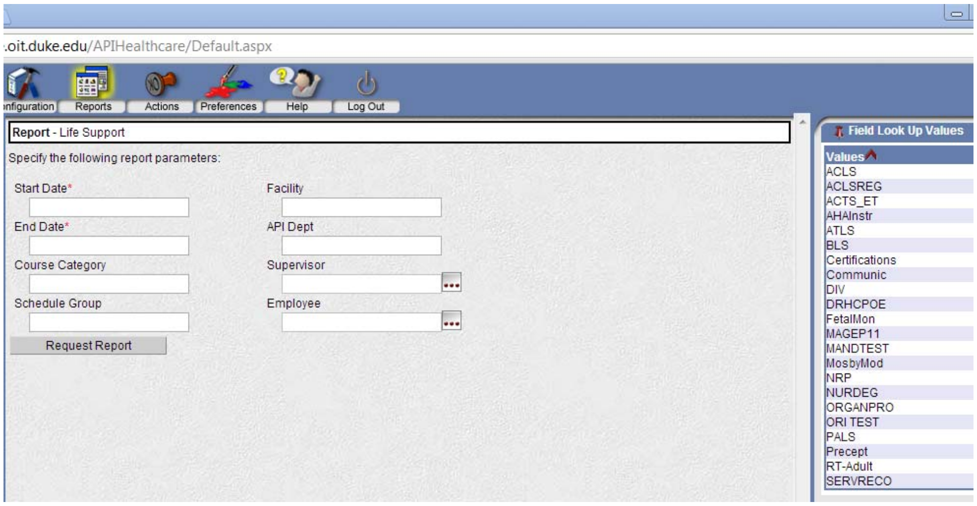
- Life Support Report for BLS, ACLS, PALS and NRP – includes the date taken and the date it expires; select discipline by selecting Course Category
- Certifications – includes the date taken and the date it expires based on national organization
- Pooled Courses without Expiration Dates – include the date taken only; use this report for tracking completion of:
    - Degrees
    - Preceptor course completion
    - Basics of Communication completion
    - Diversity Training
    - Nursing Degrees
    - Service Recovery

Life Support Report

Under Custom Reports, click the folder beside Life Support report.

Enter Facility and your API Dept information.
Enter the Start Date and End Date for you report.

Click in the Course Category text field and choose the pooled category you need for your report



Click Request Report.

Certification Report – see steps for Life Support report

Under Custom Reports, click the folder beside Certifications report.
Enter Facility and your API Dept information.
Enter the Start Date and End Date for you report.

Click in the Course Category text field and choose the pooled category you need for your report
Click Request Report.

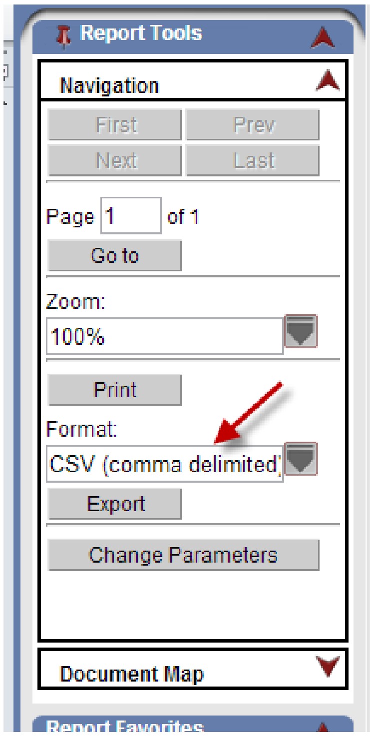
Pooled Courses without Expiration Dates Report – see steps for Life Support report

Under Custom Reports, click the folder beside Pooled Courses without Expiration Dates report.
Enter Facility and your API Dept information.
Enter the Start Date and End Date for you report.

Click in the Course Category text field and choose the pooled category you need for your report
Click Request Report.

Exporting to Excel

Once you run a report, you will get the following view on the left side of the page under Navigation.



To **PRINT**, you can click Print if using Internet Explorer. For a cleaner report, change the **FORMAT** selection to PDF, then print from the PDF document.

To **EXPORT** the document into Excel, leave the FORMAT to csv and click EXPORT. The file will open in Excel.

To schedule a class:

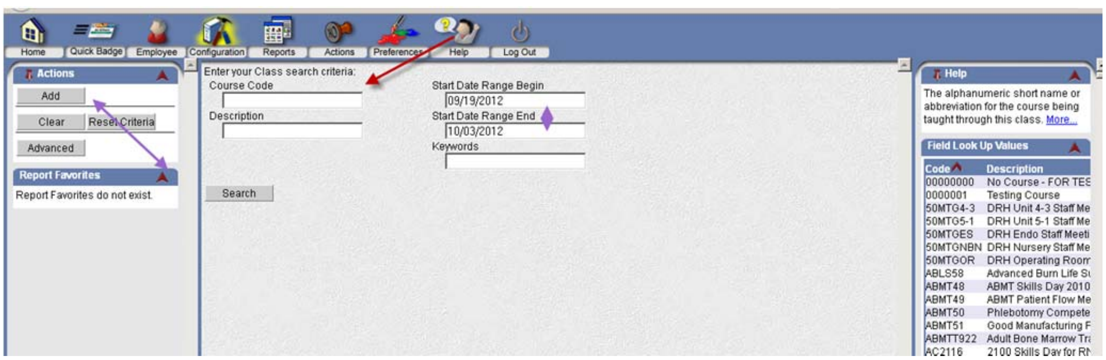
Click on the Configuration icon. Choose the Class icon under Education Tracking.

To see if the class already exists:

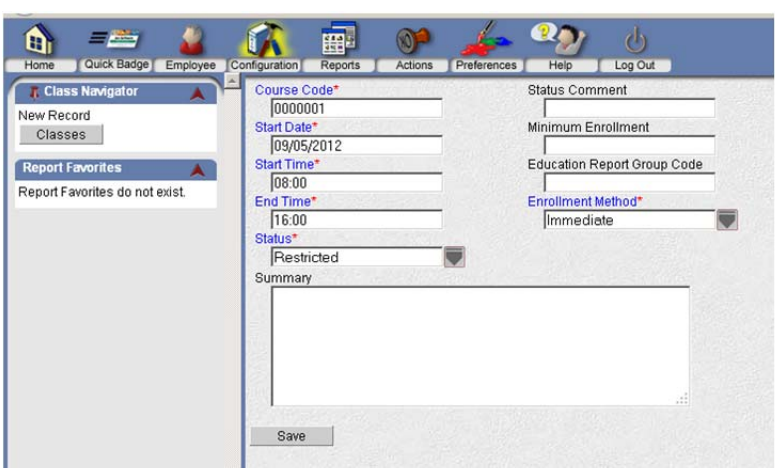
1. Click the Course Code box. A list appears on the right side. You can type the **course code** in the box once the list appears and go directly to the code on the right side.
2. Click the code on the right side.
3. Be sure to have the date range completed.
4. Then click **Search.**

To create a new class:

1. Click the **Add** button on the left side.



2. Click the **Course Code** box. A list appears on the right side. You can type the course code in the box once the list appears and go directly to the code on the right side.
3. Click the code on the right side.
4. Enter the Start Date, Start Time and End Time.



5. Status:
   - Restricted (not seen for enrollment)
   - Limited (seen but cannot enroll)
   - Pending or Posted (seen and can enroll)
   - Cancel (class is cancelled)
6. Enrollment Method: Setting that determines whether employees are immediately enrolled in a class or an enrollment request is submitted that requires approval by an authorized user.

   The following Enrollment Method options are available:

Immediate	All employees are immediately enrolled in the class without submitting a request.
Need	Employees who have a mandatory requirement for a course (based on education requirements) are immediately enrolled in the class without submitting a request. Employees who have a non-mandatory requirement for the course or no requirement are submitted as a request to enroll in the class. The request must be approved before the employee is enrolled in the class.
Request	All employees are submitted as a request to enroll in the class. The request must be approved before the employee is enrolled in the class.

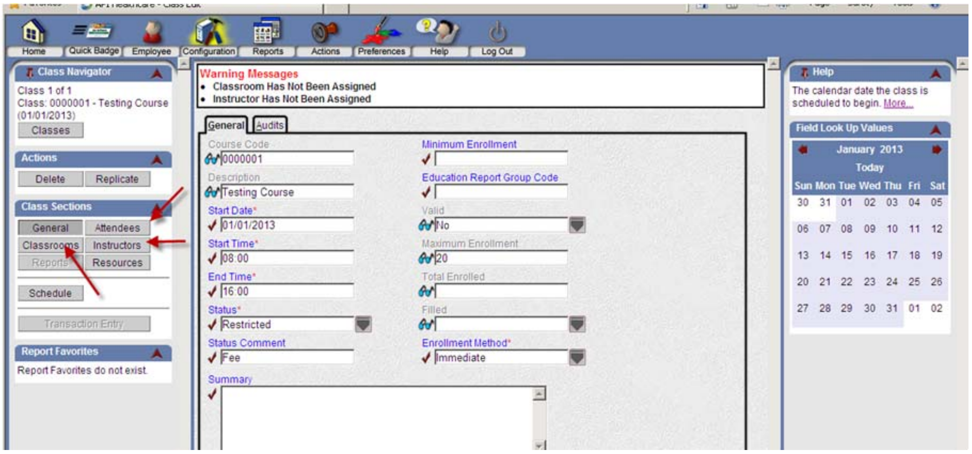
7. Minimum enrollment: The minimum number of employees who should be registered for a class before it will be held. A blank field indicates there is no minimum enrollment required

8. Status comment: Any comments explaining the status field entry.
9. Summary: Free-form text field to enter more information, such as a more detailed description of this course.
10. Click **SAVE.**

You will see any Warning Messages at the top of the screen. The warning messages - Classroom Has Not Been Assigned or Instructor Has Not Been Assigned - will appear.

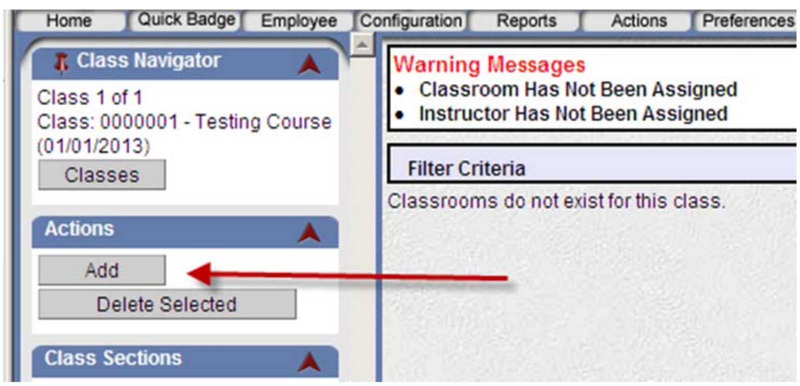
You do not have to assign a classroom or instructor to schedule a class that occurred in the past. You can proceed to the instructions that begin with "To schedule a class…"

Once the class is saved, you will see more options appear in the left column.

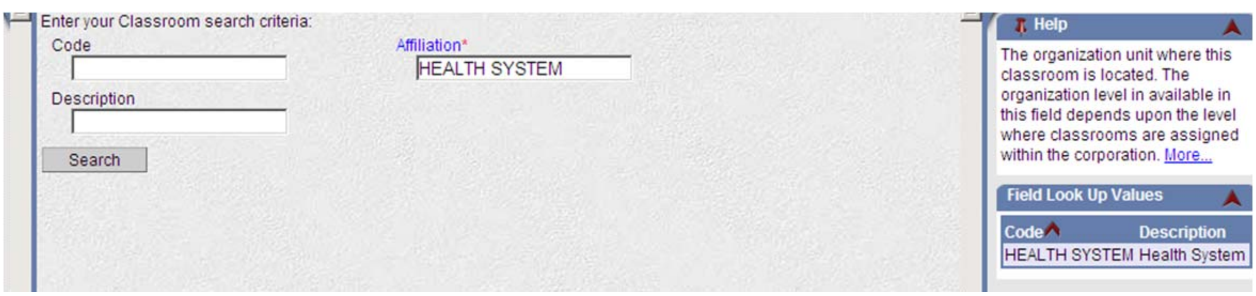


To add a Classroom:

Click **Classroom** button. Then click the **Add** button.

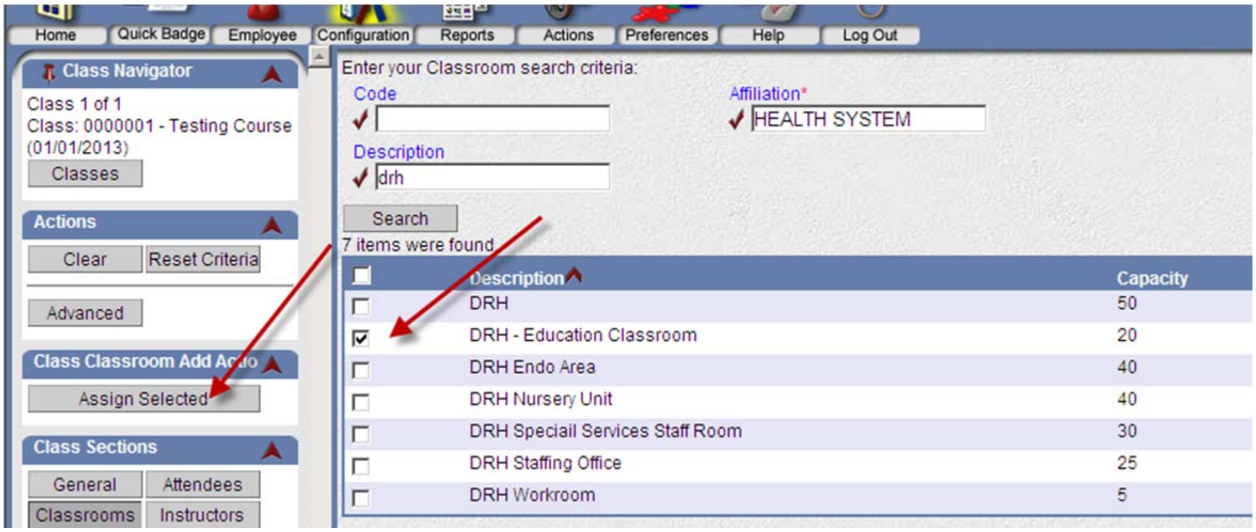


Click in the Affiliation box and choose Health System.

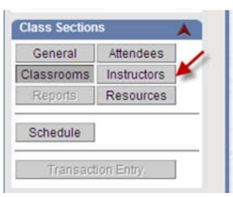


Search for a classroom using the **Description** box.

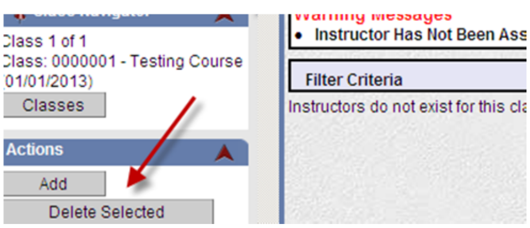
Once you select the classroom, click the **Assign Selected** button.



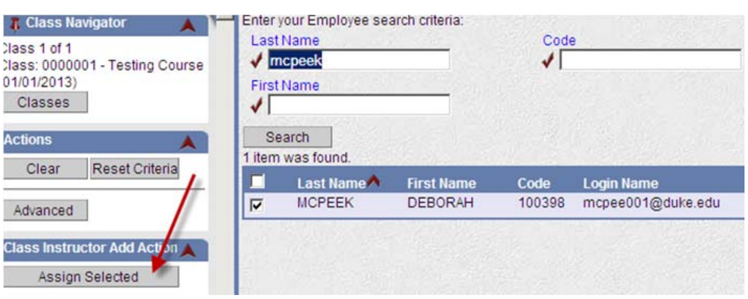
To add an instructor, click the **Instructor** button.



Click Add.

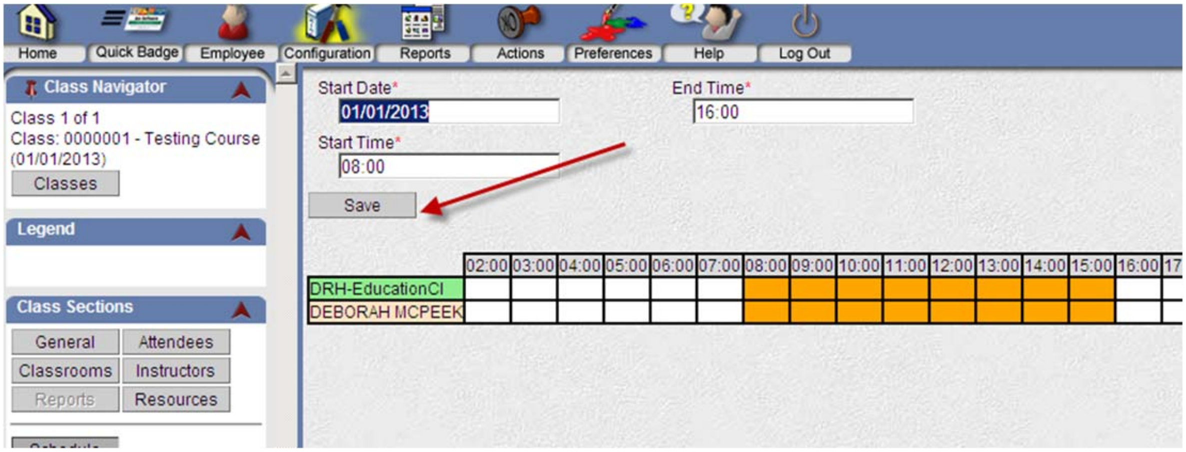


Search by last name. Check the box in front of instructor name. Click Assign Selected.

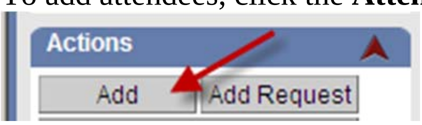


To schedule the class, click the Schedule button. This screen appears to confirm your data.

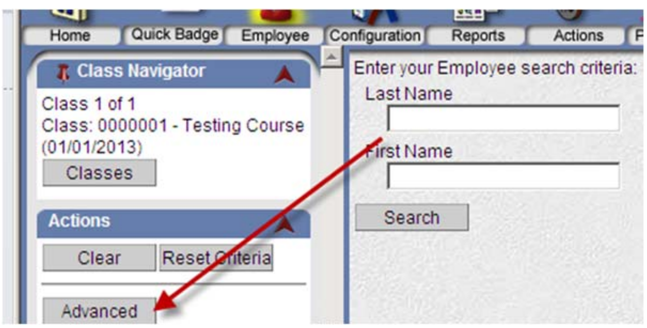
To save the class, click the Save button **IF you do not have attendees to add**.



To add attendees, click the **Attendees** button. Then click the **Add** button.

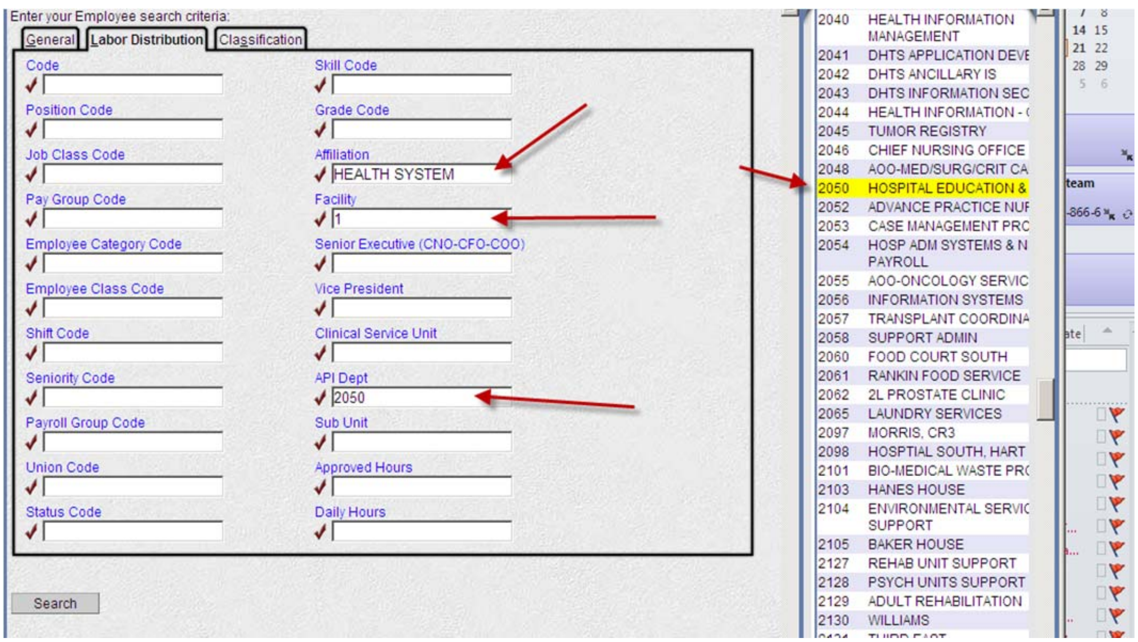


Click the **Advanced** button.

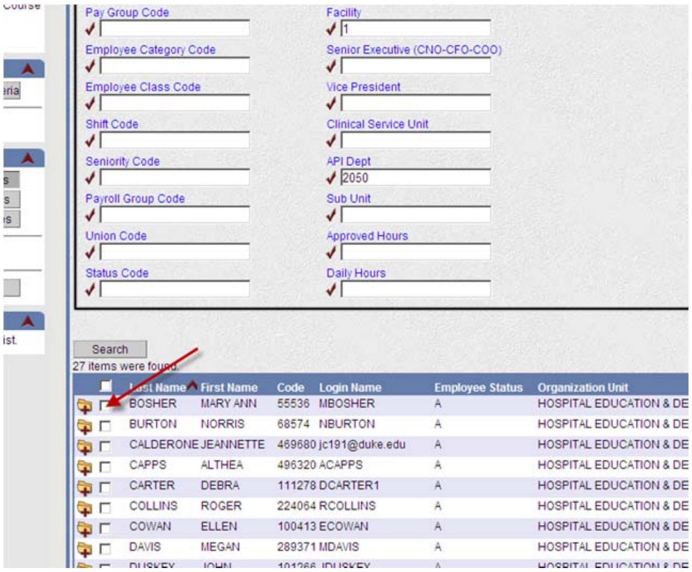


From this screen, you can select one employee using **last name or Login Number.**

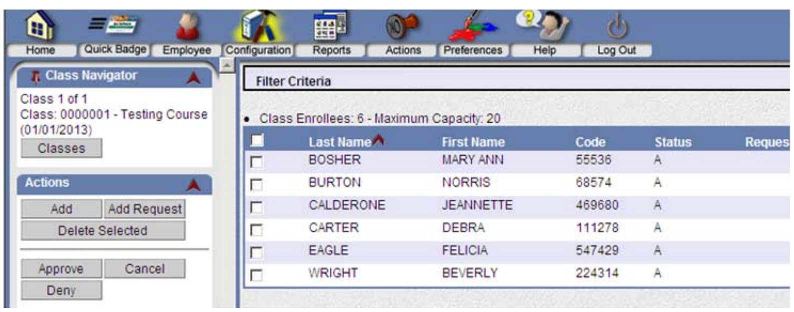
To select from your department, click **the Labor Distribution** tab and click in the **Affiliation** box. Select **Health System** from the right side. Click in the **Facility** box and select the correct Facility from the list on the right side. Click in the **API Dept** and type your department number once the list on the right side populates. Click **Search**.



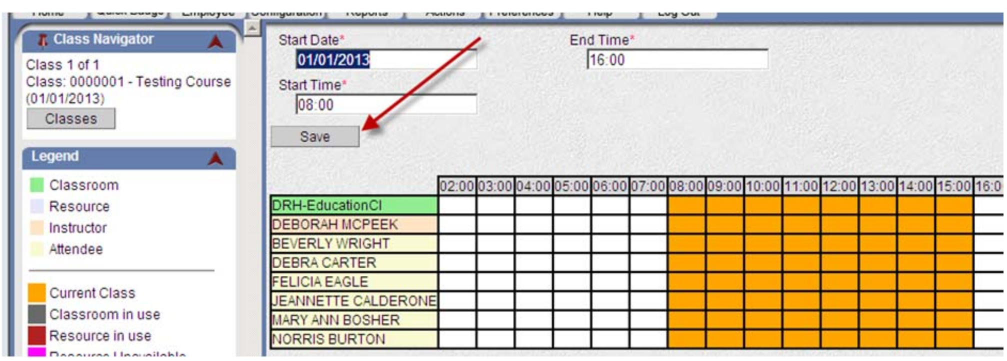
*******Once the search finishes, put a check mark beside the employees you wish to add to the class**



Once you have selected all the attendees, click a folder with the + sign on it. This screen appears.



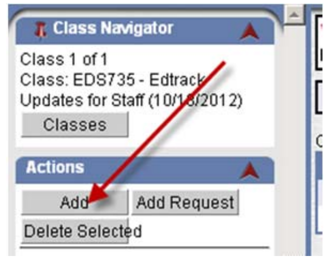
Click Schedule on the right side. Once the confirmation screen appears, **click SAVE**



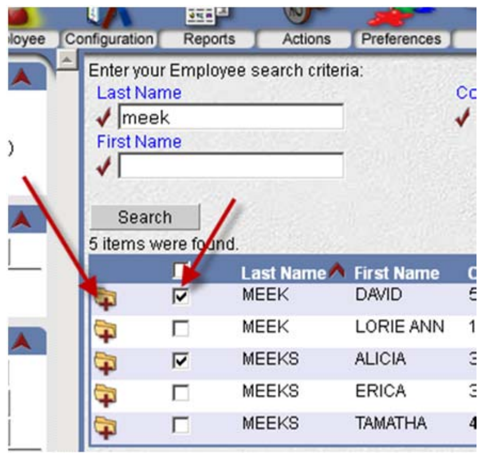
To add employees to existing class:

Search for the class. Click the folder to open the class.

Click Attendees. Click Add



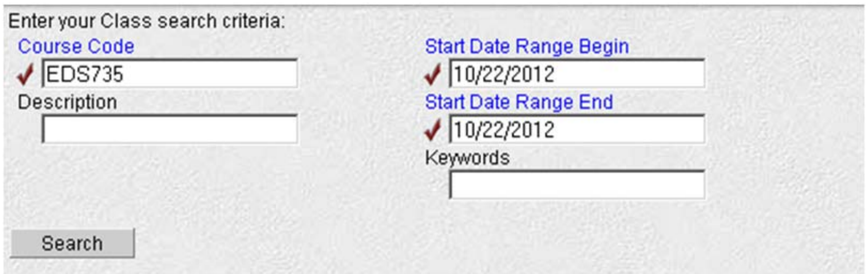
1. Search for the employee.
2. Once you find the employee, place a checkmark in the box.
3. Continue searching for the employees to enroll in the class.
4. Once you have all the employees selected, **click the folder with the "+" sign** (any of the folders). This will add the employee/s to the class.



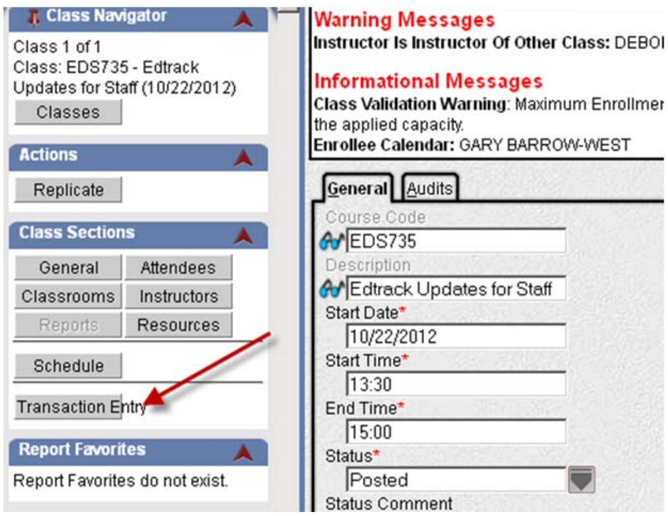
Transaction Entry (committing a class)

Click the Configuration icon.

Search for the Class you need to commit. Search for the Course Code and enter the date of the class – Begin and End Date Range. Click Search

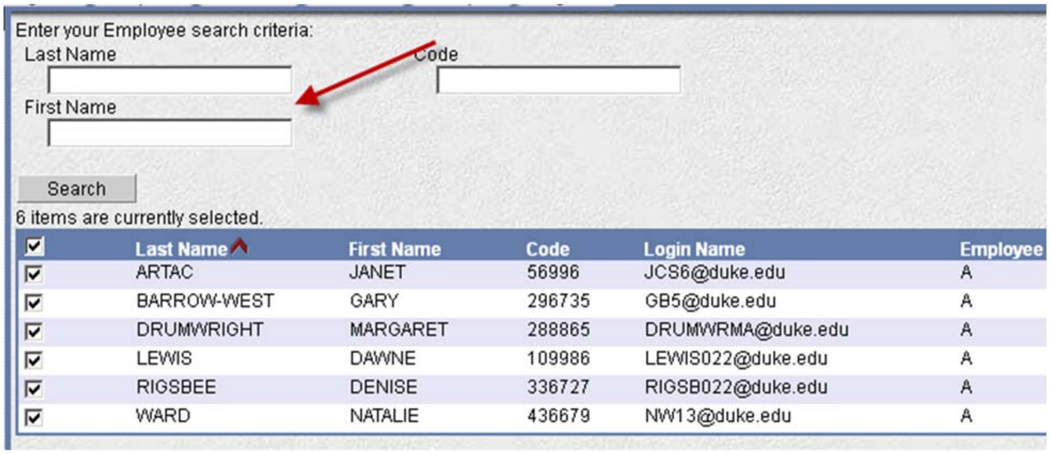


Once the list of classes appears, click the folder beside the class you need to commit. When the General class screen appears, check to make sure you have the right class. Then click **Transaction Entry**.

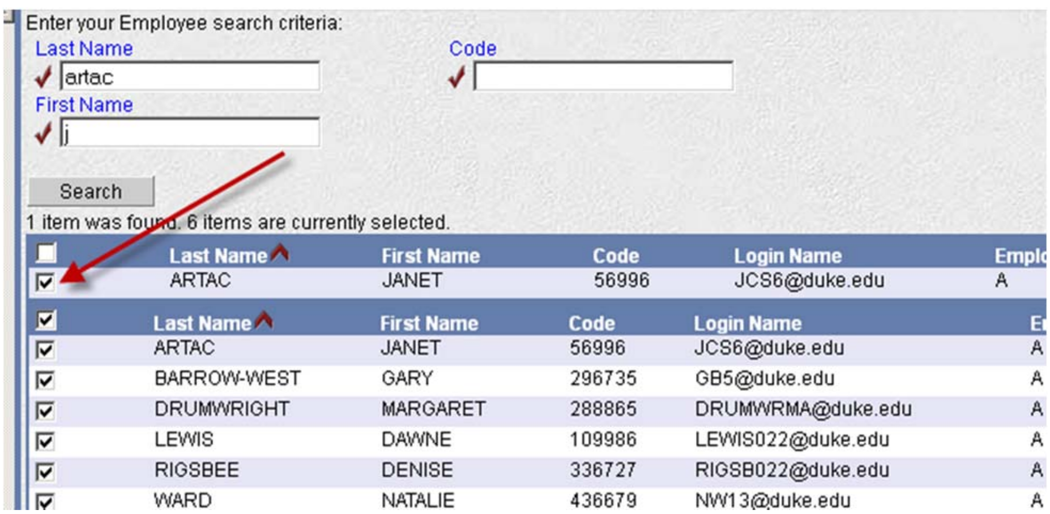


Change **Overwrite** to Yes on the next screen. Then click the **Next** button under the Class Transaction Wizard.

You will see a list of employees who registered for the class. **To add Walk-ins**, search for an employee using the search criteria on the page.

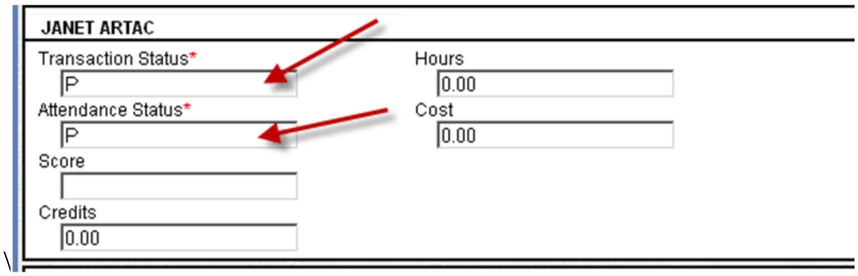


Once the employee name appears, put a **Checkmark in the box** beside the employee name. You will do this step for each employee that was a **walk-in and did not register.**



Once you have added all the walk-ins, click the **Next** button under **Class Transaction Wizard**.

Once the next screen appears, you can change the Transaction Status if needed and the Attendance Status if needed.



Transaction Status:

Code	Description
C	Canceled
F	Failed
I	Incomplete
NS	No Show
P	Passed
W	Withdrawn

Use only the following:

Incomplete = may have attended class but did not successfully complete a test or demonstration
No Show = did not attend the class and did not notify appropriate department/person.
Passed = Attended or Passed a test
Withdraw = Withdrew from the class or called and withdrew due to having to staff unit/illness

Attendance Status:

Present = attended the class
Not Present = did not attend – was a No Show or Withdrawn

Click **Finish.**

You will receive an email with a pdf report that you have completed a Transaction Entry. Please print the pdf report and attach to roster as confirmation the transaction was completed.

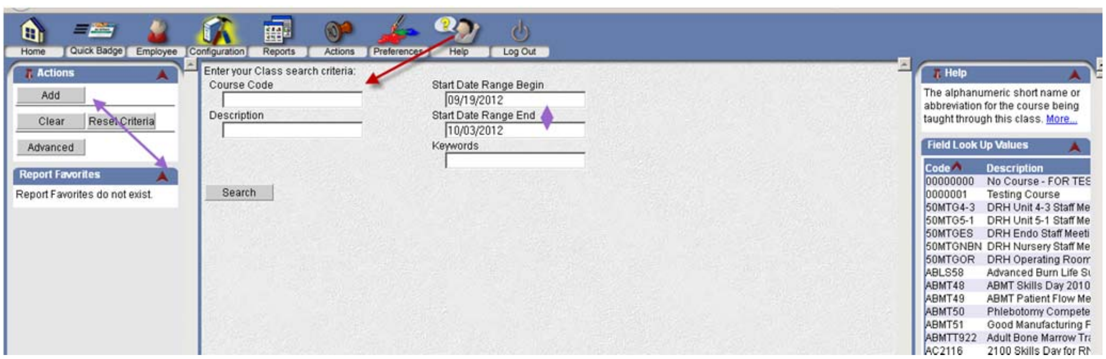
Clinical Education & Professional Development
Duke University Health System

Login in to EdTrack at https://time.oit.duke.edu/apihealthcare/.
Credentials are your NetID and password.

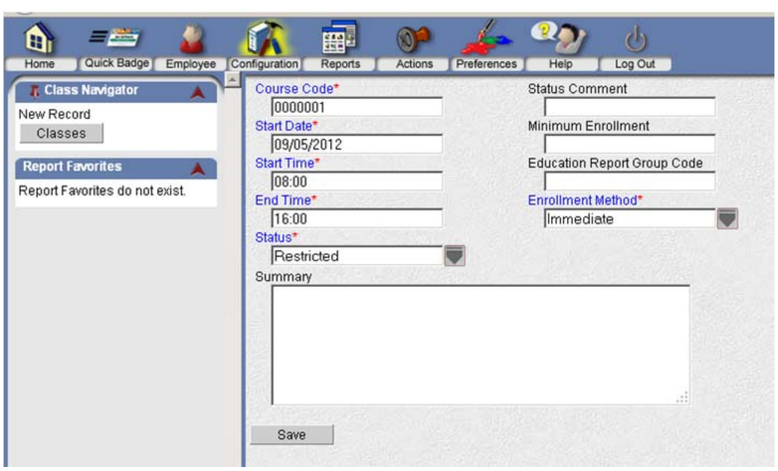
To enter a degree or certification:

Click on the Configuration icon. Choose the Class icon under Education Tracking.

1. To enter the degree or certification, click the **Add** button on the left side.

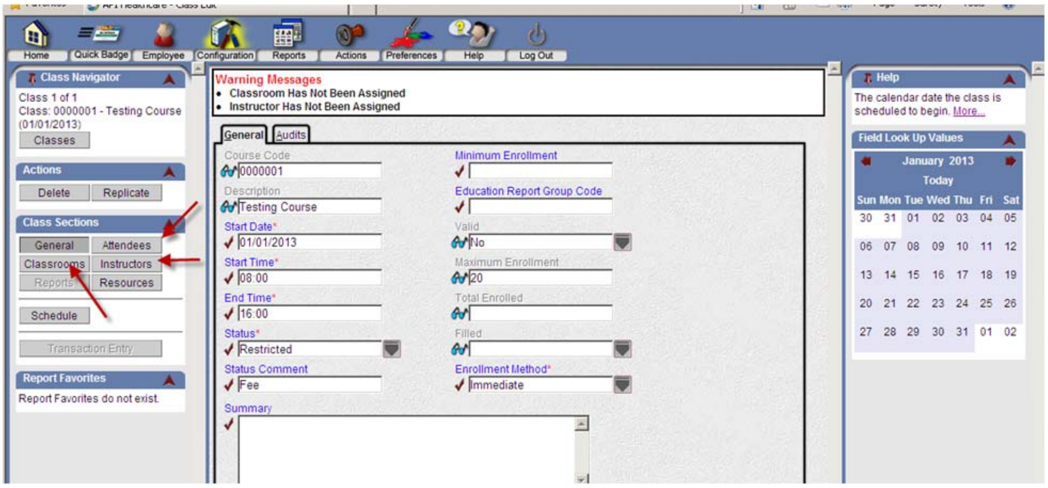


2. Click the **Course Code** box.
3. A list appears on the right side. You can type the course code in the box once the list appears and go directly to the code on the right side. **All degrees start with DEG and nursing paid certifications start with CERT.**
4. Click the code on the right side.
5. Enter the date of degree or certification. Time can be any time frame (EX: 0800 – 0801)

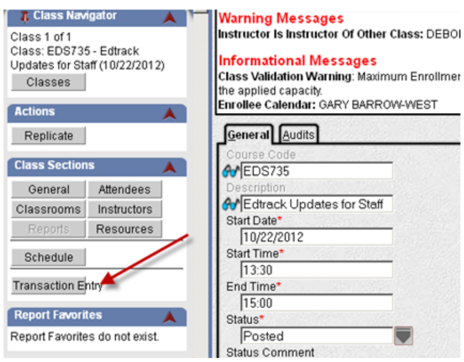


6. Status is Restricted.

7. Enrollment Method is Immediate.
8. Click **SAVE.**
9. You may see Warning Messages at the top of the screen. You do not need to have Instructor or Classroom assigned.

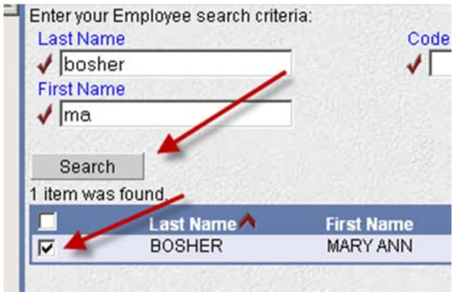


10. **Click the Transaction Entry**

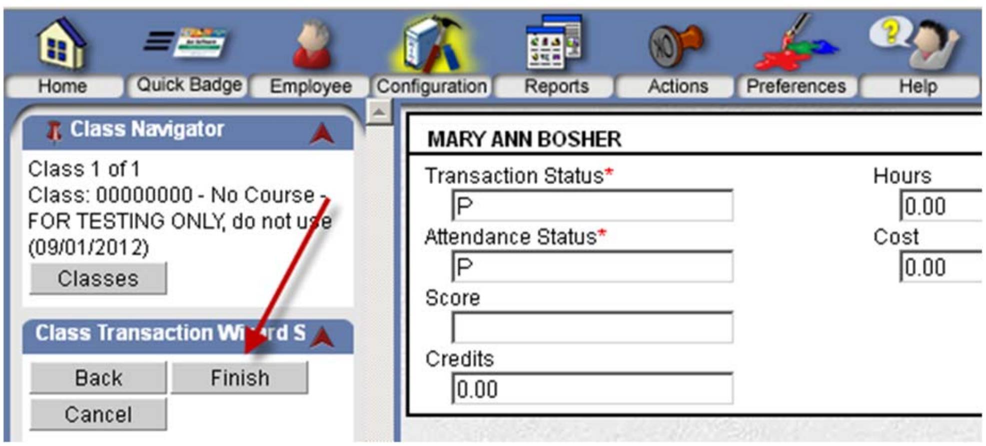


11. Change **Overwrite** to Yes on the next screen.
12. Then click the **Next** button under the Class Transaction Wizard.

13. Search for employee using Last Name and First Name or by Code (uniqueID).



14. Once the employee name appears, put a **Checkmark in the box** beside the employee name.
15. Click the **Next** button under **Class Transaction Wizard**.
16. Confirm all information is correct.
17. Click Finish.

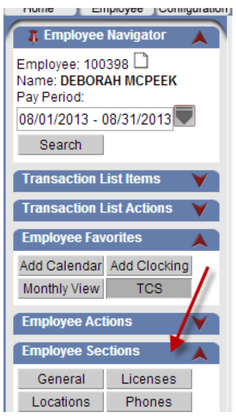


Adding a License

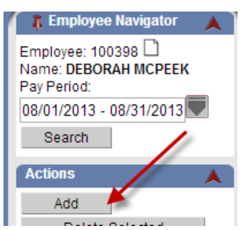
1. Log in to Time & Attendance.

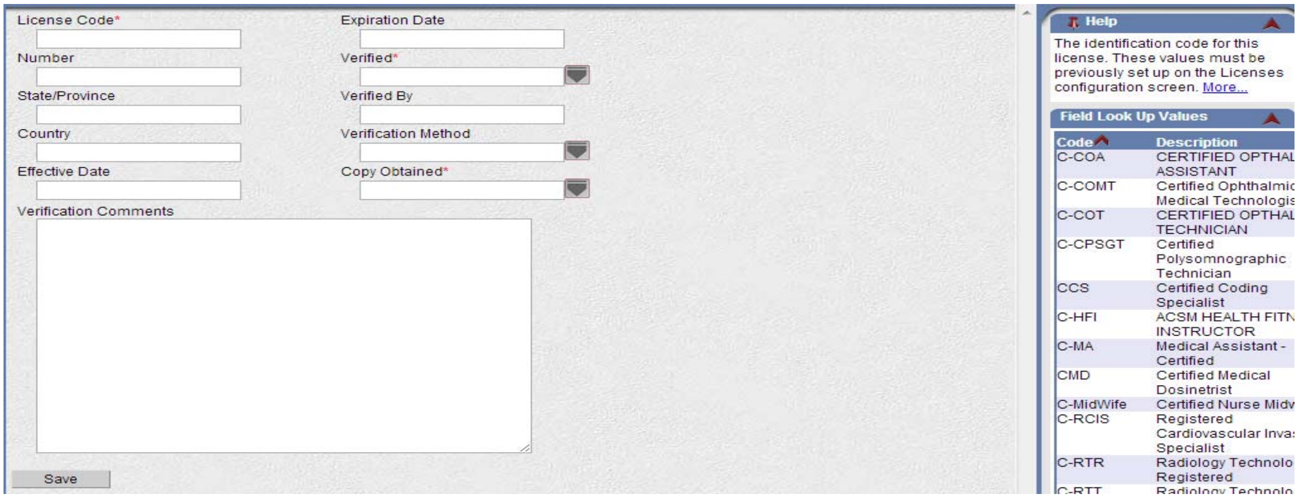
2. Click on the Employee icon and enter the name of the employee, then click Search.

3. Expand the Employee Sections and click on Licenses.



4. To add a license, click Add then complete the information.





5. Click in the License Code box and choose the correct License code from the list on the right side of the screen. Enter the License Number, State, Effective Date, Expiration Date, Verified (Yes), Verificy by (your NetID), Verification Method (Website), Copy Obtained. In the Verification Comments, put the Confirmation number from the Website. Once the information is completed, click Save.

To Update a License:

Follow steps 1 – 3 above.

Click on the Red Arrow to expand the record.

Update the Expiration date, verified by and replace the confirmation code in the Verification Comments section. Click Save.