PROTOCOL DOCUMENTS
Learning Center to iLearnOregon transition

Abstract
This document includes best practices for DHS|OHA use of iLearn. It is a living document, and may be updated often.
Version 7 (6/15/16)

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Introduction

This protocol document was created to help drive consistency in the DHS|OHA use of iLearnOregon, which will also help maintain a level of reliability for the data.

The protocols are organized into the following categories:

01 Site Administration
02 Course Administration
03 Training Administration
04 Surveys, Reports, and Tests
05 Self-Reported Learning
06 Content Administration
07 Payment

All protocols are listed as Draft until they are approved by the Employee Training Council. Revisions are tracked for each protocol at the bottom of the page under Protocol History.

Each protocol has seven sections. If a section does not pertain to the protocol, it is marked as “None”. The seven sections are:

- **Purpose**: a brief description of the intention of the protocol.
- **Protocol**: the actual explanation, guideline or standard to be followed to create consistency among users.
- **References**: citations from or links to existing DAS iLearnOregon protocols or DHS|OHA policies.
- **Definitions**: clarifies the meanings of terms used, makes a consistent vocabulary for users.
- **Contact**: names and email addresses of DHS|OHA Domain Administrators.
- **Background**: provides context for the protocol.
- **Protocol History**: versioning and description of what has changed.

DHS|OHA Domain Administrators:
- Michael Kryskalla, MICHAEL.J.KRYSKALLA@state.or.us
- Erin Holbrook, ERIN.HOLBROOK@state.or.us

Versions 2-5 updated individual protocols as changes were required.

Version 6 updated the order of the protocols listed in this book. The numbers were changed on most of the protocols listed. On 3/21/16, protocols team reviewed content and highlighted outstanding items.

Version 7 finalized Payment protocols and removed draft watermark for printing.
Site Administration
01-01: Enterprise Configurations

** PURPOSE:** Some of the configuration options available within the iLearnOregon impact all domains within the system. Controls need to be put in place in order to minimize those impacts to other domains. This protocol describes the configuration options that will be maintained at the Enterprise level.

** PROTOCOL:** All agencies that have an agency domain within the iLearnOregon must follow the Enterprise Configurations.

1. Any state-level changes in policy and/or process that DHS|OHA recommends must have a well-documented business-reason for the change; the benefits of the suggested change must be outlined and examples provided (when applicable).
   - To submit a request, please send an email with the suggested change, and examples, to Domain Administrators via email at DHS.Training@state.or.us.

** REFERENCES:** iLearnOregon Statewide Protocols: Enterprise Configurations, 08-005.

** DEFINITIONS:**
*Domain:* A domain is a section(s) of the server which allows each agency to define access privileges to a customized version of the iLearnOregon.

** CONTACT:** DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

** BACKGROUND:** DAS has an existing 5 page protocol to address concerns that may arise relating to changes that impact the iLearnOregon system statewide.

** PROTOCOL HISTORY:**
- Initial Draft: (12/10/15)
- Version 2: (12/21/15) Added section I and Ia to create internal process for requesting change to the state protocol.
- Version 3: (1/8/16) Revised section I (a) to clarify the process, removing references to policy. Added II for how to request change.
Site Administration
01-02: User Accounts

**Approved by: **

**Effective Date: **

**PURPOSE:** To outline the process for managers when adding or transferring employees to iLearn.

**PROTOCOL:** The personnel action (PA) form triggers account actions in iLearnOregon for employees new to the agency and new to a section.

If an employee’s account is not showing up in iLearnOregon, **DO NOT CREATE A NEW ACCOUNT** for the employee. Instead, contact the Service Desk.

I. **New to state service:** Once the PA is completed by Human Resources, iLearnOregon automatically creates an account for the new employee.
   a. The employee will use their OR# as their user name and password.
   b. The employee should update their email address and manager in “My Account”.

II. **Moving from another state agency or returning to state service:** This employee already has an iLearnOregon account. Once their PA is processed, the employee will be moved into the correct Domain, office and section of iLearn.
   a. The employee will use their previous logon id and password. Help desk can assist in finding this information, if needed.
   b. The employee should update their email address and manager in My Account.

III. **Moving within an agency:** Once their PA is processed, the employee will be moved into the correct office and section of iLearn.
   a. The employee will continue to use their existing logon id and password.
   b. The employee should update their manager in “My Account”.

IV. **Partners:** Follow the steps listed in iLearnOregon on how to create a new account (see reference below).
   a. Follow the steps listed in DHS|OHA protocol 01.04: Login Instructions for Partners, located in this guide.

**REFERENCES:** iLearnOregon job aid: Create a New Account

**DEFINITIONS:** Partner – A non-state employee who is required to take training classes in iLearn.

**CONTACT:** DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

**BACKGROUND:** None
iLearnOregon Protocol – DHS|OHA

PROTOCOL HISTORY:
- Initial Draft: (12/10/15)
- Version 2: (12/17/15) Changed protocol name from Manager Roles to User Accounts, and changed point of contact for questions from DHS|OHA Domain Administrators to the Service Desk.
PURPOSE: To inform partners of requirements upon initial log in.

PROTOCOL: Partners must follow these steps when logging into iLearnOregon for the first time.

I. Upon first log in, it is recommended that the profile be updated with the following:
   a. Name (as you want it to appear on your training record)
   b. Email address
   c. Phone # (Work preferred)
   d. Organization
   e. Manager
   f. Work Address

II. If user is coming from another agency and already has an iLearnOregon account, user must go in and update their profile info.

III. It is strongly recommended that new users update the security questions so that they can access the system if they forget their password.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
   • DHS.Training@state.or.us

BACKGROUND: The State of Oregon Department of Human Services and Oregon Health Authority are in the process of transitioning to a new learning management system.

PROTOCOL HISTORY:
   • Initial draft: (12/1/15)
   • Version 2: (12/11/15) Changed Work Phone # to Phone # (Work preferred) to accommodate partners who may need to use their personal phone number.
   • Version 3: (12/17/15) Changed wording from “must” to “it is recommended” (section I.), and added section III.
Site Administration
01-04: Permissions

Approved by: ___________________________  Effective Date: ___________________________

PURPOSE: To clarify who can update Domain Administrator roles.

PROTOCOL: Only DAS can update Domain Administrator roles.

I. When an Agency Domain Administrator is no longer going to be performing that role, the agency must submit a notification to DAS at least 15 days prior to them vacating the role via iLearnOregon@oregon.gov.

II. When a user has a personnel action with a change related to Agency, Job Title, or Organization, iLearnOregon will automatically revoke any system roles previously held.

III. If a user still needs any of the previously held system roles, they will need to request the role(s) be reestablished.


DEFINITIONS:
- Domain – A domain is a section(s) of the server which allows each agency to define access privileges to a customized version of iLearnOregon.
- Agency Domain Administrators – Are responsible for overseeing their agency domain in iLearnOregon.
- Permissions – Giving a user, organization, or role the authority to view, launch or manage an item in the system.
- Role – A name for groups of users that have a specific set of permissions. Based on a user's role, additional features and options are available in the system. A user may be added to one or more roles. Manage Roles is where you add and remove users from roles.
- System Roles – System roles have fixed permissions. Users assigned to system roles have access to additional features and options in the system. Only users who have the Administrator role can add or remove users from a system role. A user may be added to one or more system role by an Administrator.

CONTACT: DHS|OHA Domain Administrators:
  • DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
  • Initial draft: (12/10/15)
iLearnOregon Protocol – DHS|OHA

Site Administration
01-05: Areas Not Currently or Universally in Use

<table>
<thead>
<tr>
<th>Approved by:</th>
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PURPOSE: To designate certain areas of iLearnOregon as “not in use at this time” until decisions are made to manage their use and help assure consistency among users.

PROTOCOL: It has been determined that DHS|OHA will not use the following functions in iLearnOregon:

I. Course rating
II. On the job training
III. Development Plan

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: There are sections of iLearnOregon that are accessible to users, but have not had protocols established to help govern the use of those areas.

PROTOCOL HISTORY:
- Initial draft: (12/11/15) Much of the content is in question
- Version 2: (12/17/15) Simplified language, clarified content to list the three functions that will not be used.
iLearnOregon Protocol – DHS|OHA

Course Administration
02-01: Instructors

Approved by: Effective Date:

PURPOSE: To ensure there is a point of contact for all accommodation and course related questions.

PROTOCOL: A DHS|OHA employee must be listed as the instructor for a course (My Responsibilities > Content Management > Schedule & Manage Sections > Create New Course Section and Event).

I. Instructors can only be listed for one section at a time. If there are two sections at the same time (ex. Paid and no-cost), different instructors must be listed.

II. A state employee must be the point of contact for all logistics related to the class. The training administrator can be listed as the instructor for classes with an outside instructor.

III. Non-employee instructors can be listed in the Notes part of the section, or in the Section Title.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: There is no systematic way for iLearnOregon to alert instructors of classroom accommodation needs. The process for an employee who needs accommodation is to contact HR, who will then contact the instructor listed in iLearn. This is not a process that works if a non-employee is listed as the point of contact.

PROTOCOL HISTORY:
- Initial draft: (12/11/15)
- Version 2: (12/21/15) Added instruction for calling out non-employee instructors in the Notes part of the Section.
Course Administration
02-02: Permissions

Approved by:  

Effective Date:  

PURPOSE: To describe the process for managing courses and their content by a nonowner / instructor proxy.

PROTOCOL: As long as a user has a Course Manager role in iLearnOregon, they have access to edit other courses, including ones they did not create. No permission assignment is needed.

If someone needs administrative access to iLearnOregon, they must attend the Course Administrator training and be added as a Course Administrator by a Domain Administrator.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
   • DHS.Training@state.or.us

BACKGROUND: Permission groups may be assigned to an unlimited number of courses and/or curriculums if there are no audience membership limitations. Permission group changes will affect all courses/curriculums associated with the assigned permission group.

PROTOCOL HISTORY:
   • Initial draft: (12/2/15)
   • Version 2: (12/21/15) Revised protocol with correct information.
   • Version 3 (5/25/16) Corrected protocol to say that no permissions should be assigned, unless the assignee attends user admin training.
Course Administration
02-03: Setting Up New Courses and Editing Existing Courses

PURPOSE: To create guidelines to add or edit a course.

PROTOCOL: Before creating, editing or reusing a course, a search must be performed in both active and inactive courses to ensure that the course is currently available. Edit a course only in the domain in which it was created.

The following actions must be performed:

I. Search for an existing course by entering the exact title, then a similar title of the course in question.

II. If a course populates after entering the search criteria, and the course objectives are similar, DO NOT enter a new course.

III. Contact the course owner if edits to an existing course are needed, including the review of supporting attachments.

IV. If a course populates based on the search criteria, but the desired course content varies significantly from that in iLearnOregon, add a new course.

a. The criteria to consider when deciding to edit an existing course:
   i. The course duration is similar (no more than a thirty (30) minute variance)
   ii. The learning goal is the same; content is similar
   iii. Site Administration deems editing an existing course is appropriate
   iv. Changes to training activities do not significantly alter course grading

b. The criteria to consider when creating a new course are:
   i. The course objective is significantly different from the existing content
   ii. Site Administration deems editing an existing course is NOT appropriate
   iii. Changes to training activities significantly alter course grading

REFERENCES: Protocol 02:06 Naming Conventions.

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators
- DHS.Training@state.or.us
BACKGROUND: Administrators only have access to their home domain for building courses. Because of this system restriction, we removed all references to creating a course in the non-home domain.

PROTOCOL HISTORY:
- Initial draft: (12/2/15)
Course Administration
02-04: Course Visibility

Approved by: Effective Date:

PURPOSE: It is important for all DHS|OHA employees and partners to be able to view the entire DHS|OHA Learning Catalog. iLearnOregon provides ways to restrict course registration without limiting the courses displayed in the Learning Catalog. It is the intent of this protocol to take advantage of these features, and use iLearnOregon in such a way as to best meet our needs. Following this protocol will help ensure that all courses are visible in the electronic Learning Catalog, even when course registration is restricted to only a small number of people.

PROTOCOL:

I. Active courses will be visible to all.
II. Inactive courses will be hidden.

REFERENCES: None

DEFINITIONS:
- **Active** – Users can find the content item in the search results of the Learning Catalog when the course is set to active at the course or document level. A content item can be set as active for a specific period of time. This also means they see any upcoming sections.
- **Inactive** – The content item will not show up in the search results of the Learning Catalog from My own Learning> Learning Home> Search Learning Catalog. Inactive classes can still be viewed if the user goes into My own Learning> Learning Catalog> and selects “See more search criteria”> then selects Activity “Inactive”.

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
- Initial draft: (12/2/15)
- Version 2: (12/21/15) Added definitions for active and inactive course.
Course Administration
02-05: Identifying Courses as Active

Approved by:  Effective Date:

PURPOSE: To specify when to mark a class as Active.

PROTOCOL: In iLearnOregon courses should be marked as Active. If the course is part of a linear curriculum or specific need to restrict enrollment, then the choice should be to mark it Inactive.

I. Section visibility as active means that a participant can see it in the Sections list and register for it.

II. Section activity set to inactive, means it won’t show up in the list.
   a. Users would want to set each section to inactive for future events. An example of this is cultural competency. We schedule sections for a year in advance, but we only want learners to register during next 3 months so we mark the rest as inactive.
   b. You can also set a date that you want the section to become Active on.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
   • DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
   • Initial draft: (12/2/15)
   • Version 2: (12/21/15) Added active and inactive instructions to the protocol part of the document.
Purpose: To easily identify training by organization, program area, and class title. To assure that users can efficiently search for a particular course or course content.

Protocol: All courses must follow the standard naming convention. The naming convention is the same for face to face, virtual, and online courses.

I. **Course names**: start with the 3 letter organization code, which mirrors the domain where the class was built: DHS or OHA, or DHSOHA for shared (which allows DHSOHA to be searchable as a word), followed with a space, a dash, a space, your program area code (ex. DMAP or OIS), a space, a dash, a space, then the course name.
   a. Example: DHS – CW – Adoption Assistance
   b. Example: DHSOHA – OIS – Microsoft Project Server training
   c. Example: OHA – OSH – New Employee Orientation

II. **Section titles**: are used to differentiate classes within a course, when desired.
   a. Locations (ex. Salem, Portland, Eugene)
   b. Target Audience (ex. District 55 only)
   c. NetLink course: At a computer near you (for virtual course)
   d. Section titles may also mirror course names

III. **Event titles**: are used to differentiate events within a section.
   a. Used to clarify the event, audience, or location (ex.: 1 of 4, or morning session)
   b. Event titles may also mirror course names.

IV. **Character limits**: While iLearnOregon allows unlimited characters in the course name and description fields, it does not format and becomes difficult to read.
   a. **Course title**: Limit to 100 characters, including spaces and punctuation.
   b. **Section title**: Limit to 45 characters, including spaces and punctuation.
   c. **Course description**: these are included in the email sent to the learner from iLearnOregon, and should be concise.

V. **Virtual courses**: Virtual courses (Netlink and Webinar) follow the same naming conventions as the other course types.
   a. Format: When creating a new course section and event, select Virtual to identify class as a virtual class.
   b. Includes “Netlink:” or “Webinar:” after the program area abbreviation and before the name of the class.

VI. **Online courses**: Online courses follow the same naming conventions as the other course types. They are easily identified by a computer icon and by Type: Online.
iLearnOregon Protocol – DHS|OHA

a. When retiring an online course, the name should include “Retired Online.”
   (ex. OHA – OIS – Retired Course: Feedback for Managers)

VII. **Curriculum titles**: used to identify a curriculum vs. a course
    a. Follows the Course Name format
    b. Includes “Curriculum”: after the program area abbreviation and before the
       name of the class. (ex. OHA – OIS – Curriculum: Business Analysis
       Series.)
    c. When retiring a curriculum, the name should include “Retired Curriculum”.
       (ex. OHA – OIS – Retired Curriculum: Business Analysis Series.)

VIII. **Document titles**: Used to identify documents associated with a course.
    a. Follows the Course Name format
    b. Recommended to use .pdf files or links

REFERENCES: Protocol 02-03: Setting Up New Courses and Editing Existing Courses,
Protocol 02-17: Retiring a Curriculum

DEFINITIONS:
- **Face to face** – A live class held in a classroom. The instructor and participants
  are in the room together.
- **Virtual** – A live class (webinar) taken from a computer terminal rather than a
  classroom. Most virtual courses use NetLink or Adobe Connect. Virtual courses
  have set times, as they have a live instructor leading the course.
- **Online** – A self-paced, e-learning session which can be taken at any time from a
  computer. You may hear these courses refered to as SCORM courses.
- **Curriculum** – A series of classes that are tied together, constituting an area of
  specialization.
- **Document** – Any attachment that the student will need to access (usually pre-
  class). Can be link to a url, or an attachment in the form of a PDF.

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: Anyone posting a course to iLearnOregon will complete the Title,
Topic, Synopsis, and Keywords sections with the end user in mind. This may include
using key subject areas; knowledge, skills and abilities (KSAs), learner outcomes,
acronyms, and a description of the audience.

As classes transition from the Learning Center to iLearnOregon, the class name will
include the course number at the end of the title.

PROTOCOL HISTORY:
- Initial draft: (12/1/15)
- Discussion at core team meeting about Shared Services dropping the 3 letter
  organization code in the naming convention. Other options included adding
SS instead of DHS or OHS, or using DHS|OHA for Shared Service sponsored courses. Erin Holbrook to research. 12/9/15

- **Version 2: (12/17/15)**
  - It was determined that all workgroups will use the naming convention starting with the 3 letter code of the domain where the course was built. This is a DAS statewide protocol. Each learning administrator has only one home domain.
  - Corrected references to online and virtual: added definitions for these terms.
  - Added section V. for online classes.
- **Version 3: (3/17/16)** – added a note to the Background section about how class names will transition over to iLearn Oregon from the Learning Center.
- **Version 4 (5/10/16)** – added event, curriculum, and document naming conventions. Updated Virtual Learning section to include Webinar in the naming convention.
- **Version 5 (5/17/16)** – updated naming convention for shared services from DHS OHA to DHSOHA. This will allow users to search for DHSOHA as a single word, making the process easier. Also added more examples of naming, for DHS, OHA, and DHSOHA.
- **Version 6 (6/6/16)** – added naming convention for retired online courses. The purpose of this is to differentiate a retired online course on a learner’s transcript and also for reporting. When a course admin runs an iLearn built-in report on an online course, there’s no way to differentiate the active course from the inactive course.
Purpose: To ensure the My Responsibilities > Course > Course Information section of iLearnOregon is filled out completely and accurately.

Protocol: The Course Information fields should be completed as follows:

I. Course Cost: Leave blank unless there is a charge for the course.

II. Course Number:
   a. You can use this field to tie courses together for reporting. There is no search functionality for the user based on Course Number, so it is not a required field.
   b. If your program area decides to use this field, we recommend you create a process for assigning these numbers within your organization.

III. Course Provider: This is a required field. It is the name of the organization creating and/or sponsoring the training class. See chart in References, below.
   a. If a new “Course Provider” needs to be added to the list, contact a domain administrator to verify that the sponsor does not already exist within iLearn.
   b. The domain administrator will add the new sponsor if it is determined to be appropriate.

IV. Duration: This is not a required field, unless offering course credits.

V. Credit Value: This is not a required field, unless offering course credits.

VI. Credit Type: This is not a required field, unless offering course credits.

References: Protocol 02-15: Offering Courses for Credit

Course Provider List:

<table>
<thead>
<tr>
<th>DHS – use major program and operation names or abbreviations</th>
<th>OHA – use division names</th>
</tr>
</thead>
<tbody>
<tr>
<td>DHS – APD</td>
<td>OHA – Operations and Finance</td>
</tr>
<tr>
<td>DHS – Home Care Commission</td>
<td>OHA – Equity and Inclusion</td>
</tr>
<tr>
<td>DHS – CW</td>
<td>OHA – Oregon State Hospital</td>
</tr>
<tr>
<td>DHS – CW&amp;SSP Field Offices</td>
<td>OHA – Public Health</td>
</tr>
<tr>
<td>DHS – DD</td>
<td>OHA – Health Systems</td>
</tr>
<tr>
<td>DHS – Other (Central Ops and DO)</td>
<td>OHA – External Relations</td>
</tr>
<tr>
<td>DHS – Shared Services</td>
<td>OHA – Health Policy and Analytics</td>
</tr>
</tbody>
</table>
DEFINITIONS:

- Course Provider – In iLearnOregon, it is defined as the organization developing and/or sponsoring the training. It is the same as a Sponsor Organization in the Learning Center.

CONTACT: DHS|OHA Domain Administrators:

- DHS.Training@state.or.us

BACKGROUND: This protocol is for the general classes, not offered for credit. The goal is to reduce the number of fields used in iLearnOregon to reduce the chance for errors. Since most courses in iLearnOregon are not for credit, the protocol team decided to separate the two protocols.

Course Provider: In the Learning Center, sponsor organizations were listed multiple times in varying formats. This protocol was developed to standardize the course provider names listed in iLearnOregon and ensure organizations are only listed once.

PROTOCOL HISTORY:

- Initial draft: (12/11/15)
- Version 2: (12/17/15) Removed instructions for offering courses for credits and created a new protocol for that process.
- Version 3: (03/03/16) Added Course Provider List under references.
- Version 4: (03/07/16) Merged protocol for Adding a Course Provider (previously 06:02) with this one. Corrected course number information. Removed what was 06:02 from this document.
Course Administration
02-08: Privacy / Security

**Purpose:** To ensure all training materials loaded into iLearnOregon is compliant with Privacy and Security guidelines.

**Protocol:** Training materials in iLearnOregon must never contain any personally identifying information (PII) nor any protected health information (PHI).

**References:** General Privacy Policy (OHA-100-001), Administrative, Technical, and Physical Safeguards (OHA-100-009)

**Definitions:** None

**Contact:** DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

**Background:** None

**Protocol History:**
- Initial draft: (12/1/15)
Course Administration
02-09: Keywords

Approved by: Effective Date:

PURPOSE: To provide guidelines for using keywords, which will help users search for and find courses more easily. Keywords are words and phrases that are used in course information and registration searches.

PROTOCOL: Keywords are a required field in iLearn. When creating a course, keywords that are not already listed in the title should be added to the Keywords field. Keywords are not shown to users.

I. Keywords should include the following:
   a. Course creator’s name and initials.
   b. Misspellings and abbreviations of words in course title.
   c. Words, misspellings, and abbreviations that users are likely to use to search for the class.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
   • DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
   • Initial draft: (12/1/15)
Course Administration
02-10: Notifications

Approved by:  Effective Date:

PURPOSE: To provide guidelines for sending class notification emails.

PROTOCOL: iLearnOregon allows the course administrator to set times for notification emails to be sent to participants. The standard notification times should be used for classes in iLearnOregon.

I. Notifications should be sent for all of the following time frames:
   a. 2 weeks before class starts
   b. 1 week before class starts
   c. 2 days before class starts

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
- Initial draft: (5/10/16)
Course Administration
02-11: Waitlist

PURPOSE: To identify when it is appropriate to create a waitlist in iLearn. Waitlists are provided as a customer service. Having a cutoff date allows time for participants to adjust their schedules.

PROTOCOL: Classroom courses that are open for registration should include a waitlist. This ensures full classes and allows users to attend a course if a registered user backs out.

I. Waitlists are required for open courses.
   a. Registration cutoff date is suggested as 3 days before class start date.
   b. Waitlist cutoff date is suggested as 2 days before class start date.

II. Waitlists are not required for course sections when the administrator enrolls the participants.

III. Paid courses should not use waitlists, as there is no system ability for refunding payments.
   a. Do not use the waitlist feature for course sections that participants can pay for. The system will continue to accept registrations and allow users to pay for courses, even when the course capacity has reached its limit. Paying registrants must find alternate course dates if courses are full.
   b. If a class is divided between paying and non-paying participants, two sections must be created. The open section may have a waitlist, but the paid course may not. An example of this is a class set up for OIS employees which will allow other DHS|OHA employees to attend for a fee.

REFERENCES: None

DEFINITIONS:
- Open course – A class that is available for general registration through iLearn.
- Section – Similar to session in the Learning Center, a section refers to a single instance of a course. For example, there are 10 available class dates for Understanding Yourself and Others, each class date is a section in iLearnOregon.
- Paid course – A class that requires payment to attend

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us
BACKGROUND: Waitlists are provided as a service to allow participants to take a space in a full class, if another user drops the course. Our system allows for a participant to be waitlisted for multiple sections of a course.

Once the user is enrolled in a course, they will be automatically removed from all other sections within that course.

In the Learning Center, users were able to be waitlisted for a class and enrolled for a later section of that same class. If they were moved from waitlist status to enrolled in the earlier class, their name was removed from the later class. That function is NOT an option in iLearn. Users cannot be waitlisted and enrolled in different sections of the same course.

PROTOCOL HISTORY:
- Initial draft: (12/1/15)
- Version 2: (12/11/15) Changed the background to list functioning of the Learning Center, which is different than the iLearnOregon process.
- Version 3: (12/17/15) Added definition of section. Removed references to closed courses.
Course Administration
02-12: Deep Links

**PURPOSE:** To provide guidelines for creating and providing deep links for course content links.

**PROTOCOL:** When setting up a course it is expected that the course owner will create a shortened link directly to the course and paste the shortened link into the content link field in the course details.

1. Course owners will use http://go.usa.gov/ as the tool to create a shortened course link.

**REFERENCES:** None

**DEFINITIONS:** None

**CONTACT:** DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

**BACKGROUND:** The State of Oregon Department of Human Services and Oregon Health Authority are in the process of transitioning to a new learning management system. Protocols are needed to establish best practices for creating shortened links for course content.

**PROTOCOL HISTORY:**
- Initial draft: (12/1/15)
Course Administration
02-13: Course Sharing

Approved by:  
Effective Date:

PURPOSE: To provide guidelines for sharing courses between agencies.

PROTOCOL: When setting up a course please follow agency or program policy to determine which employee groups should have access to the course. It is the course owner’s responsibility to share the course between DHS and OHA’s organizational domains in iLearn.

I. Courses are created in your home domain then shared across domains as appropriate.
   a. For courses that are available to multiple employee groups, the course should be shared across both DHS and OHA domains.

II. For courses that are limited to specific employee groups, the course owner can restrict course sharing and only make the course available to the single domain where the employee groups resides.
   a. There is a $10 fee for classes that are not shared across domains. DAS will bill the agencies for this amount.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
   • DHS.Training@state.or.us

BACKGROUND: The State of Oregon Department of Human Services and Oregon Health Authority are in the process of transitioning to a new learning management system. The prior learning management system (DHS|OHA Learning Center) only had a single domain which did not require sharing of courses. Due to this, protocols needed to be established to help govern the process in which courses are shared between DHS and OHA agency domains.

PROTOCOL HISTORY:
   • Initial draft: (12/1/15)
   • Version 2: (12/11/15) added that courses will be created in the home domain.
   • Version 3 (12/17/15) added II.a. there will be a fee for classes that are not shared across domains.
Course Administration
02-14: Assigning Mandatory Training

**Approved by:**

**Effective Date:**

**PURPOSE:** Identify when it is appropriate to assign a person or group to mandatory training.

**PROTOCOL:**

I. Before using this feature, you must first seek approval from the manager who oversees training for your program area.

II. Mandatory Training should only be used under limited circumstances, including:
   a. When the course is required to be taken by an entire department or program area.
   b. When a specific training is required for all persons within a specific classification to meet federal, state, competency, or program requirements.
   c. Special courses as identified by upper management.

**REFERENCES:** None

**DEFINITIONS:** None

**CONTACT:** DHS|OHA Domain Administrators:
   - DHS.Training@state.or.us

**BACKGROUND:** The Core Implementation Team has recommended conservative use of this feature. Each program area needs to strategize how to use the ability to identify mandatory training in iLearn. This is an organization and culture change within DHS|OHA, and will take some planning and communication first.

**PROTOCOL HISTORY:**
   - Initial draft: (12/2/15)
   - Version 2 (12/17/15) Clarified that mandatory training can be for departments or program areas.
Course Administration
02-15: Approval-Required Training or Access Approval

Approved by:  Effective Date:

PURPOSE: Identify when it is appropriate to require electronic approval to attend a course.

PROTOCOL:

I. Before using this feature, you must first seek approval from the manager who oversees training for your program area.

II. Approval requirement should only be used under limited circumstances, including:
   a. When there is a cost to attend the course or special event.
   b. For high-profile training with limited seats.
   c. Special courses as identified by upper management.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
   • DHS.Training@state.or.us

BACKGROUND: The ability to require electronic approval of training requests is a feature that comes with the iLearnOregon implementation for DHS|OHA. Use of this feature has been identified as a workload issue.

PROTOCOL HISTORY:
   • Initial draft: (12/2/15)
Purpose: To ensure the My Responsibilities > Course > Course Information section of iLearnOregon is filled out completely and accurately for classes that offer credits.

Protocol: After following steps I through III in protocol 02-01: Course Information, complete the fields listed below to ensure course credit is correctly offered and applied. These fields are all required when offering credits.

I. Duration: This is the actual number of training hours offered in this classroom.
   a. Break times should be subtracted from the total class time to come up with the duration.
   b. Ex.: A class that runs from 8:00 am to 5:00 pm with a one hour lunch and two 15 minute breaks has a total duration of 7.5 hours.

II. Credit Value: It is used when offering credits, such as Continuing Education Units (CEU), college credit, or certification credits for the course. If used, this field should match the Duration field.

III. Credit Type: It is used in conjunction with Credit Value. Frequently used fields are:
   a. Continuing Education Units: Course hours fulfill continuing education requirements for licensing, certification, etc.
   b. College Credit: Course hours fulfill college credit requirements.

IV. If alpha or numeric (A,B,C,100%, etc.) scoring is required for a course to comply with accreditation for college courses or CEUs, you must follow the standards and requirements of the board or college issuing the credits or CEUs.

Note: A training course has to be accredited (or approved) prior to a program area granting CEUs to attend. There is usually a fee associated with proving that the course content and the instructors meet the requirements of the CEU granting body.

References:
- Protocol 02-07: Course Information
- Employee Training Council Guidelines About Continuing Education Unit (CEU)

Definitions: None

Contact: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

Background: Since most classes offered through iLearnOregon are not for credit, a separate protocol was needed for classes offered for credits.
PROTOCOL HISTORY:
- Initial draft: (12/17/15)
- Version 2 (03/07/16) – Updated NOTE: with better language regarding accreditation information. Added reference to Training Council Guidelines.
Course Administration
02-17: Retiring a Curriculum

PURPOSE: To provide guidelines for how to retire a curriculum.

PROTOCOL: Sometimes curriculums have so many changes that we need to replace the entire curriculum and replace with a new one. If the courses within a curriculum have significant changes, retire the old one and replace with a new version.

I. Add “Retired” to the curriculum name to distinguish the old curriculum from the new one.

II. Change retired curriculum status to Inactive, which will hide it from searches.

REFERENCES:
- Protocol 02-06: Naming conventions

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
Initial draft: (05/10/16)
Training Administration
03-01: Notes and Assignments

PURPOSE: To ensure that registrants are informed of notes and assignments.

PROTOCOL: If notes and assignments are added to a course, an email message must be sent to registrants informing them that they are available.

I. **Option 1:** Create the classroom course and create documents separately. Provide instructions for learners to find the information in the Learning Catalog via the course description or Notes.

II. **Option 2:** Upload the classroom course and the documents and then create a curriculum so users can enroll once and have everything in one place. They would simply search the Learning Catalog for the curriculum or be provided a deeplink to the curriculum. (Best recommendation)

III. **Option 3:** Create Notes in the classroom course description or event level detail that directs learners to an outside website or SharePoint to retrieve the course materials.
   a) Go to: Classroom Course – Section> Event level and include “Notes” in the event letting participants know to search for additional Documents in the Learning Catalog. Users will see these Notes prior to registering for a course.
   b) These notes could use deeplinks to route the user to the documents or simply list the document name as a search reference.

REFERENCES: None

DEFINITIONS:
- **Document** – there is a feature within iLearnOregon that we are asking to have separated as a role to only allow access to Documents. Documents allow you to upload Word, PDF, Powerpoint, etc. as a separate document that is searchable in the Learning Catalog. The recommended format is PDF.

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: There is not a way to attach documents or course materials to a section or classroom course like there was in the Learning Center. Team rooms were a Learning Center feature and do not exist in iLearnOregon. Team rooms are where documents were stored for learners previously.

In iLearnOregon, you can edit a Section at the Event level and include “Notes”. Notes are for users to read before they enroll in a classroom course section. You could include a url to pre-work here, although the html will not be active with it.
PROTOCOL HISTORY:

- Initial draft: (12/11/15)
- Version 2: (12/23/15) Corrected information and added options for creating notes and assignments; added definition and background.
Training Administration
03-02: Completion of Attendance

Approved by: 

Effective Date: 

PURPOSE: To ensure that participants receive credit for classes attended.

PROTOCOL: Attendance status must be entered into iLearnOregon within 30 days of the training session.

I. When a participant contests their attendance, grade, or score, follow the procedure identified by your program area.

II. Exception: When a course provides CEUs or other certification credit, refer to the course/section instructor.

III. Once a participant is scored as complete, the system does not allow that status to be changed. All other completion statuses can be edited.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
- Initial draft: (12/11/15)
- Version 2: (12/17/15) Added note that completed status cannot be changed.
Training Administration
03-03: Course Scoring Criteria

**Approved by:**

**Effective Date:**

**PURPOSE:** To define scoring criteria for a course.

**PROTOCOL:** You must have management approval to apply grading/scoring that is other than Complete, Incomplete, No-Show, Pass or Fail.

**REFERENCES:** Protocol 02-02: Offering Courses for Credit

**DEFINITIONS:** None

**CONTACT:** DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

**BACKGROUND:** DHS|OHA does not generally apply alpha or numeric scoring to DHS|OHA sponsored training. If the class is for credit, the administrator should follow the protocol for Offering Courses for Credit.

**PROTOCOL HISTORY:**
- Initial draft: (12/11/15)
- Version 2: (12/17/15) Removed scoring protocol related to for-credit classes. They are now in Protocol 02-02.
Survey, Reports, and Tests
04-01: End of Course Surveys

PURPOSE: To provide guidelines for end of course surveys.

PROTOCOL: When setting up a course it is expected that a course survey will be assigned for participants to evaluate the course. Surveys can be paper or electronic (ex. Created in Survey Gizmo or using the survey tool in iLearnOregon).

I. When setting up a course that will only be used by your program area, follow the procedures and requirements of your organization.

II. Once a survey is attached to a course, altering questions contained in the survey will skew the results of past respondents.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
  - DHS.Training@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
  - Initial draft: (12/1/15)
  - Version 2: (12/17/15) Revised to remove indication that surveys must be created using the iLearnOregon survey tool.
Self-Reported Learning
05-01: Self-reported Certification

Approved by: ___________________________ Effective Date: ___________________________

PURPOSE: iLearnOregon has over 100 certifications and licenses that users can add to their transcript.

PROTOCOL: If the certification or license the user has is not listed, they should contact DHS|OHA Domain Administrators (listed below).

REFERENCES: None

DEFINITIONS:
- Certification – refers to the confirmation of certain characteristics of an object, person, or organization. This confirmation is often, but not always, provided by some form of external review, education, assessment, or audit. Accreditation is a specific organization’s process of certification.
- License – refers to the officially or legally authorized approval to perform acts and procedures not permitted to those without a license (ex. A state board of medical licensure).

CONTACT: DHS|OHA Domain Administrators:
- DHS.Tranining@state.or.us

BACKGROUND: None

PROTOCOL HISTORY:
- Initial draft: (12/1/15)
- Version 2: (12/18/15) Added definitions.
Content Administration
06-01: Linking to an External URL

PURPOSE: To prevent linking to inappropriate or outdated websites

PROTOCOL: Administrators who post external links to a course are responsible for ensuring the accuracy and relevance of a posted link.

I. The site must provide accurate and compelling data and not exhibit defamatory or discriminatory content.
II. Site Administrators have the authority to remove links that are deemed inappropriate.

REFERENCES: None

DEFINITIONS: A link points to a non-DHS|OHA owned webpage.

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: There are concerns about maintaining appropriate internet usage on DHS|OHA websites.

PROTOCOL HISTORY:
- Initial draft: (12/1/15)
- Version 2: (12/18/15) Revised for clarification and correct role names.
Content Administration
06-02: Adding a Room Location to iLearn

Approved by: ___________________________ Effective Date: ___________________________

PURPOSE: To add a new training location to iLearn

PROTOCOL: Confirm that the room does not already exist in iLearn. If a location needs to be added, contact the domain administrators.

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
  • DHS.Training@state.or.us

BACKGROUND: When a new training/meeting location becomes available, the new location’s address and description must be added to iLearnOregon before the new location will appear in the address book.

PROTOCOL HISTORY:
  • Initial draft: (12/1/15)
Payment
07-01: Managing Paid and Unpaid Attendees

Approved by: Effective Date:

PURPOSE: To provide guidelines for maintaining courses with paying and no-cost participants.

PROTOCOL: If the participant audience is split between no-cost and paying users, then two courses need to be created. If the course audience includes all paying participants or all no-cost participants, no additional courses are required. One single course will suffice.

I. When splitting the audience, two courses must be created: one course for non-paying participants and another for paying participants.
   a. The course for the paying participants must not include a waitlist option.
   b. Courses with a fee should include “Fee Required” as part of the name.

II. Two courses cannot use the same location or instructor for simultaneous sections. Different instructors and locations need to be assigned for each course section.
   a. It is recommended to add the information about the differences between the paying user and no-cost courses to the event Notes field. This could include the instructor’s name, room location, and any other key details.

REFERENCES: None

DEFINITIONS:
- Paying participant – User whose program area is charged to take a course. A SPOTS card is required to sign up for this class.
- No-cost participant – User whose program area is not charged to take a course. Often they belong to the Course Provider organization who is hosting the course.

CONTACT: DHS|OHA Domain Administrators:
- DHS.Training@state.or.us

BACKGROUND: The State of Oregon Department of Human Services and Oregon Health Authority are in the process of transitioning to a new learning management system. The prior learning management system (DHS|OHA Learning Center) did not have the functionality of requiring payment for training courses for participants outside of the DHS|OHA organization structure. Due to this change, protocols needed to be established to help govern the use of course sections with two different participant groups.

PROTOCOL HISTORY:
• Initial draft: (12/11/15)
• Version 2: (12/17/15) – changed free to no-cost. Need clarification from Erin Holbrook about how the system works for II.
• Version 3: (12/23/15) – added recommendation to use the event notes to explain the difference between no-cost and paying participant classes. Also added definitions.
• Version 4: (3/17/16) – corrected information so that it is clear that two courses are required, not just course sections.
Payment
07-02: Refunds for Paid Courses

Approved by: ___________________________  Effective Date: ___________________________

PURPOSE: To provide guidelines for issuing refunds to course registrants that are unable to participate in a paid course.

PROTOCOL:

I. Participants may cancel their course registration at any time prior to the start of the course.
   a. For security and to protect against fraud, credit card refunds will only be made to the card from which the payment originated.

II. Participants will not receive a refund due to non-attendance or failure to complete a course.

III. Upon notification that a participant has cancelled their registration the instructor will notify the Office of Financial Services Receipting Unit via email to request the refund.
   a. Notification is to be emailed to OFS-Receipting.DHS-OHA@state.or.us
   b. The email is to include:
      i. Name of registered participant
      ii. Name and date of course registered for
      iii. Reason of refund

REFERENCES: None

DEFINITIONS: None

CONTACT: DHS|OHA Domain Administrators:
   • DHS.Training@state.or.us

BACKGROUND: The State of Oregon Department of Human Services and Oregon Health Authority are in the process of transitioning to a new learning management system. The prior learning management system (DHS|OHA Learning Center) did not have the functionality of requiring payment for training courses for participants outside of the DHS|OHA organization structure. Due to this change, protocols needed to be established to help govern the process in which refunds would be issued for paid attendees who are not able to participate in the course after payment has been issued.

PROTOCOL HISTORY:
   • Initial draft: (12/11/15)