Professional Development Registry

Early Learning / School-Age Facility & Legal Entity Administrator Policies & Procedures
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1. **Document Revision History**

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<th>Date</th>
<th>Author</th>
<th>Notes</th>
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<tr>
<td>1.0</td>
<td>January 7, 2015</td>
<td>PA Key</td>
<td>Initial roll-out</td>
</tr>
<tr>
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<td>March 17, 2015</td>
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<td>Section 5.4 Added</td>
</tr>
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<td>July 1, 2015</td>
<td>PA Key</td>
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</tr>
</tbody>
</table>

2. **Who Should Read This Document**

This document is intended for users who have been assigned to the permission groups of Early Learning / School-Age Facility Administrator and the Legal Entity Administrator in the Pennsylvania Keys to Quality Professional Development Registry.

3. **Introduction**

3.1 **Overview**

The Professional Development Registry is a learning management system (LMS) that supports the professional development of Pennsylvania’s early learning and school-age workforce.

Using this system, each early learning and school-age professional is able to create and manage a personal professional development plan, access hundreds of courses offered throughout the state and online, print certificates for completed courses at any time, and view a transcript containing a personal history of professional development achievements and PQAS (Pennsylvania Quality Assurance System) credit hours.

Early Learning / School-Age Facility Administrators and Legal Entity Administrators can view and print Professional Development Plan compliance and forecasting reports and purchase and distribute course catalog credit to the staff within their facility or legal entity.
3.2 Purpose

This document contains the policies and processes for using the Pennsylvania Key Professional Development Registry.

3.3 Organization Nodes

The Professional Development Registry contains an organization hierarchy. Each user is associated with one or more organization nodes in the hierarchy. A student, who takes courses, is associated with the node where s/he works, for example an early learning facility or State agency. An administrator may be associated with the State or a region.

When accessing the Professional Development Registry, most users are automatically taken to the organization node with which s/he is associated. However, some users may be associated with more than one organization node.

Examples:

1. A user works at more than one early learning facility.
2. A user is both a "student" who takes courses, and a Professional Development Registry administrator.
3. A user has more than one administrator role.

When accessing the Professional Development Registry, users who are associated with more than one organization node are presented with an opening page that asks them to choose a node. Users may not be aware of the node structure or its purpose and will need to be trained in what to do when presented with this choice.

For a student who works in two or more early learning facilities, the chosen node will not make a difference unless specific training has been assigned to the student by a specific facility administrator, such as Technical Assistance. For this reason, it is a good practice for students to check the My Courses page in all nodes.

Users who have access to more than one node can identify their current node. It is displayed in the upper right corner of the page, just below the Tabs and Date. The prompt reads, "Working in: [Node]." The user can change nodes by clicking "Change Hierarchy Node."

Students who work in multiple nodes will see these prompts on all tabs. Users who are associated with only one node do not see these prompts at all.
4. **Policies**

4.1 **User Account Creation and Maintenance Policy**

Pennsylvania Key’s policy is to allow early learning and school-age professionals to create their own accounts and maintain their account information in the Pennsylvania Key Portal (www.pakeys.org). User data is automatically transferred from the Portal to the Professional Development Registry on a nightly basis. Any changes made to user data will take 24 hours to appear in the Professional Development Registry.

4.2 **Organization Creation and Maintenance Policy**

Each user is associated with a work location. Pennsylvania Key's policy is to synchronize work locations between the Pennsylvania Key Portal and the Professional Development Registry on a nightly basis. The source of early learning and school-age facility information is Pennsylvania Department of Human Services' PELICAN system. Work locations such as State and Regional Keys, CCIS, Certification, and Contracted (State-Funded) Professional Development Organizations are maintained by authorized Pennsylvania Key administrators in the Pennsylvania Key Portal. All work locations are organized by County and Regional Key. Practitioners who do not work at one of these locations are associated with a catchall location in their county of residence labeled, "Other". A practitioner whose county of residence is unknown or out of state is associated with a catchall location at the State level.
Additionally, early learning and school-age facilities are organized by the legal entity to which they belong.
4.3 Administrator Creation and Maintenance Policy

Pennsylvania Key's policy is to allow Pennsylvania Key Portal SUPER Admins to manage administrator roles manually in the Portal. These roles are automatically transferred from the Portal to the Professional Development Registry on a nightly basis.

Administrator role assignment requests will be submitted by Pennsylvania Key, Regional Keys, OCDEL, early learning / school age legal entities and facilities.

Pennsylvania Key requires 30 days advance notification to add, change or remove an administrator assignment. Requests will be fulfilled within 30 days and requestors will receive email notification when requests have been fulfilled.

Early Learning / School Age facility administrators and legal entity administrators are restricted to authorized facilities that have a valid State-assigned MPI (Master Provider Index) number, which can be found in PELICAN.

No more than one administrator per facility/legal entity may be assigned.

Users must submit a request to assign or remove an Early Learning / School Age facility or legal/entity administrator.

Requests must be approved by Pennsylvania Key.

4.4 Course Catalog Credit

4.4.1 Course Catalog Credit Overview

This process has been created to allow a Facility or Legal Entity Administrator to pay for courses for facility or legal entity staff. An Administrator can purchase credit that can be used by staff to purchase courses in the PD Registry Course Catalog. Credit can then be distributed to staff members so that they are able to log into their own PD Registry accounts and use the balance to purchase courses.

4.4.2 Course Catalog Credit Transfer Policy

Course catalog credit may only be transferred to users who have an active user profile in the Portal and who have selected this facility. Once a transfer has been made to a student, the transaction cannot be reversed or refunded. Any disputes between the facility and the staff person over transferred course catalog credit are the responsibility of the facility or legal entity. Check with your...
facility/legal entity’s financial advisor to determine what policies must be put in place to utilize this feature. Pennsylvania Key and Professional Development Registry are not responsible for retrieving unused funds from the staff.

5. PROCESSES

5.1 Purchase and Distribute Course Catalog Credit Process

<table>
<thead>
<tr>
<th>Step #</th>
<th>Page You’re On</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Home</td>
<td>Click the <img src="image" alt="Course Catalog button" /></td>
</tr>
<tr>
<td>2</td>
<td>Course Catalog</td>
<td>Enter Credit into the search field and click the Search button.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><img src="image" alt="Search field" /> Credit</td>
</tr>
<tr>
<td>3</td>
<td>Course Catalog</td>
<td>Locate the Course Catalog Credit indicated by the <img src="image" alt="icon" /> and click the <img src="image" alt="Buy button" />.</td>
</tr>
<tr>
<td>4</td>
<td>Course Catalog Credit Details</td>
<td>Enter the amount of credit you want to purchase in the Price field and click the <img src="image" alt="Buy button" />.</td>
</tr>
<tr>
<td>Step</td>
<td>Section</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>-----------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| 5    | Shopping Cart         | Click **Checkout with Credit Card** to pay for the course catalog credit with a credit card and complete the steps on the screen.  
|      |                       | Click the **Checkout with PayPal** to pay for the course catalog credit with a PayPal account and complete the steps on the screen. |
| 6    | Shopping Cart         | Click the **My Learning Path** tab.                                    |
| 7    | My Learning Path      | Click **My Account Information**                                       |
| 8    | My Account Information| Click **My Course Catalog Credit Balance**                             |
| 9    | My Course Catalog     | The top section will show you the Available Course Catalog Credit Balance in green.  
|      | Credit Balance        | The second section: Course Catalog Credit Activity shows you the credit that you’ve purchased.  
|      |                       | The third section: Balance Transfer is where you transfer credit to your staff. |
| 10   | Balance Transfer      | Click **Transfer an amount to other people**                           |
| 11   | Balance Transfer      | Click the **search** button.                                           |
| 12   | Balance Transfer      | In the search results, check the box next to the name of the person(s) to whom you want to transfer credit and then click the **** button. |
### 5.2 Run a Professional Development Plan Compliance Report

The compliance report will show you the status of staff’s professional development plans and self-assessment completion. STARS designators will use this report for designation visits. It is important that the staff list contains all active employees. If staff are missing from this report, please work with them to update their PA Key Portal User Profile with the proper facility information. Any changes to the user profile will take twenty-four (24) hours to transfer to the PD Registry.

<table>
<thead>
<tr>
<th>Step #</th>
<th>Page You’re On</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Home</td>
<td>Click the <img src="image" alt="Reporting" /> tab.</td>
</tr>
</tbody>
</table>

For STARS facilities seeking reimbursement through a grant: You will need to provide a copy of the My Course Catalog Credit Balance page as well as a copy of the student’s receipt when they register for the course.
2. Reporting

Click and select

Competency and Professional Development

and then

PA Key Professional Development Plan Compliance Report

3. Professional Development Plan Compliance Report

Scroll to the bottom of the page and click the button.

4. Professional Development Plan Compliance Report

Click the next to your node name.

Example:

<table>
<thead>
<tr>
<th>Node Name</th>
<th>Total Users</th>
<th>Active Plans</th>
<th>Pending Plans</th>
<th>Expired Plans</th>
<th>Unpopulated Plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA Registry Facility/Legal Entity Admin Policies</td>
<td>10</td>
<td>4</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
</tbody>
</table>

The top row indicates the total numbers of users within the facility with active accounts in the PD Registry. Then it shows the number of users with an active plan (fully completed), the number of users with a pending plan (partially completed), the number of users with expired plans and the number of users with unpopulated plans (have not even started the self-assessment). The list below shows each of the staff in your facility, their plan status and a link to view their Self-Assessment or Professional Development Plan. For staff with unpopulated plans, there will be no link to their Professional Development Plan or Self-Assessment as they don’t have one yet. Only staff with Active Plans will show an expiration date. To reset an expiration date, staff must clear at least one knowledge area and reassess themselves in that area.

5.3 Run a Professional Development Course Forecasting Report

This report replaces the former Facility Professional Development Plan (FPDP).

The top section of this report: Data for “My Self-Assessment Priorities” section of PDP shows courses that students are enrolled in that are related to their priorities as indicated on their self-assessments.
The second section of this report: Data for “Courses Added to My Plan from the Course Catalog” section of PDP shows courses that students are enrolled in that they added to their plan, but do not correspond directly to their priorities as indicated on their self-assessment.

The final section: Knowledge Area Data shows which questions and courses the students in your facility have prioritized and enrolled in related to each Knowledge Area, Big Idea and Essential Question.

<table>
<thead>
<tr>
<th>Step #</th>
<th>Page You’re On</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Home</td>
<td>Click the [ ] tab.</td>
</tr>
<tr>
<td>2</td>
<td>Reporting</td>
<td>Click [ ] and select Competency and Professional Development and then PA Key Professional Development Course Forecasting Report</td>
</tr>
<tr>
<td>3</td>
<td>Request PA Key Professional Development Course Forecasting Report</td>
<td>In the report name field, enter Forecasting Report and the date you’re running the report in this format MMDD-YYYY.</td>
</tr>
<tr>
<td>4</td>
<td>Forecasting Report</td>
<td>In the email address field, enter the email address(es) of anyone you want to email the report to. This step is optional.</td>
</tr>
<tr>
<td>5</td>
<td>Forecasting Report</td>
<td>Scroll to the bottom of the page and click the Save &amp; Run button.</td>
</tr>
<tr>
<td>6</td>
<td>Reporting</td>
<td>In the Completed Reports column, wait for the report to finish processing and indicate Complete. Then click View Report</td>
</tr>
</tbody>
</table>
### 5.4 Run a Transcript Report

The transcript report will show you a list of the courses your staff has taken. Each course will indicate the name, number of PQAS hours and whether or not the course was a part of their Professional Development Plan.

<table>
<thead>
<tr>
<th>Step #</th>
<th>Page You’re On</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Home</td>
<td><img src="Image" alt="Click the Reporting tab." /></td>
</tr>
<tr>
<td>2</td>
<td>Reporting</td>
<td><img src="Image" alt="Click Create New Report and then select" /></td>
</tr>
</tbody>
</table>
| 3      | Request Transcript Report | **Section 1:**  
Report Name: Enter the [Facility Name] Transcript [MM-DD-YY]  
Email Address (Optional): Enter the email address(es) of anyone to whom you want to email the report. Separate multiple emails with a semi-colon (;)  
**Section 2 (Optional):** This section can be used to schedule this report so it runs automatically on a specific schedule.  
**Section 3:** Leave at Default  
**Section 4:**  
Check **Specific User(s)** checkbox.  
Check **Automatically Add Search Results to 'Selected' List**  
Click the **search** button. |
**Section 5:**

Completion Date is after or equal to: Enter the beginning date of the period you want to view.

Completion Date is before or equal to: Enter the end date of the period you want to view.

Result type(s) to report on (pass, fail or pass & fail): Pass means that a student successfully completed the course. Fail means they did not attend or did not fully complete the requirements of the course.

Include Students With No Completions/Failures: Checking this box will show students who have not taken any courses within the PD Registry.

For Each User and Course: Include the Most Recent Completion/Failure Date Online: Checking this will show only the most recent completion of a course if they have taken it multiple times.

Hide Detailed Completion/Failure Information: Unchecked

Hide Score Information: Unchecked

**Section 6:** Leave at Default

If you want to Save this Report click **Save & Run**

If you do not want to Save the Report click **Run without Saving**

| 4  | Reporting | In the Completed Reports column, wait for the report to finish processing and indicate **Complete**. Then click **View Report** |
Example:

**Student_Name RegistryID# (Active)**
Hierarchy Node: Pennsylvania > Region > County > Facility name
Hire Date: N/A
Total Completions: 2
Total Hours: 2.00

<table>
<thead>
<tr>
<th>Completion Date</th>
<th>Overall Score</th>
<th>Course Information</th>
</tr>
</thead>
</table>
| 02/12/2015 03:20 PM   | Overall Score: 0 | PQA5 Instructor and Consultant Assurances  
Course Number: 3.0.0.0 PQA5/3.0.0.0  
Course Provider: PA Keys to Quality Professional Development Registry  
Address: -  
Phone Number: -  
Price: - |
| 10/21/2014 12:00 PM   | Overall Score: 0 | ERS: Environment Rating Scale (ERS) 101 - Foundations  
Course Number: 0.0.1.0 ERGERS101  
Course Provider: PA Keys to Quality Professional Development Registry  
Address: -  
Phone Number: -  
Price: - |

Notes:

Completion Date: The completion date indicates the date the student completed the evaluation of the course. It does not reflect the actual date of the event.

Overall Score/Credit(s) Earned: The overall score is irrelevant for our purposes. Under the score, the PQAS hours will be listed.

Course Information: The course name and number are listed.

If the course was a part of the student’s Professional Development Plan, it will have a green notice to the right of the course name indicating **This enrollment is applicable to Professional Development**. This is shown next to the second entry in the example above.
5.5 Switching Nodes for PQAS Instructors or Administrators for Multiple Facilities Only

If you are also a PQAS Instructor or an Administrator for multiple facilities, you will see a different screen upon logging into the PD Registry.

To ensure you are able to complete your tasks successfully, please follow these instructions:

When Logging In:

<table>
<thead>
<tr>
<th>Step #</th>
<th>Page You’re On</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1      | Select Your Node Affiliation | Admin Node  
|        |                 | ![Type here to begin searching...] |
|        |                 | ![Type here to begin searching for Hierarchy Node(s)] |

From the Admin Node dropdown menu select the following:

- If you want to perform PQAS Instructor tasks (Managing Courses or Scheduled Events) always select Pennsylvania.
- If you want to perform Facility Admin tasks select the facility for which you are an admin. You can begin typing the name of the facility slowly to locate it more quickly on the dropdown menu. Make sure you select the facility with a yellow folder icon ( )
- If you want to perform Legal Entity Admin tasks select the Legal Entity for which you are an admin. You can begin typing the name of the legal slowly to locate it more quickly on the dropdown menu. Make sure you select the facility with a blue folder icon ( ). (Please note: The legal entity will not show an MPI# behind it, if you select an item with a blue folder and an MPI#, then you’re actually choosing one of the facilities within the legal entity, not the legal entity itself.)

After you have selected the appropriate node, click the button.
To change nodes after you’re logged in:

<table>
<thead>
<tr>
<th>Step #</th>
<th>Page You’re On</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Manage Content, Manage Learning, or Reporting</td>
<td>If you want to switch tasks after you are already logged into the system, follow these instructions. The Working In node is listed on the right side of the Page Identification Bar. If you want to complete PQAS Instructor tasks, ensure that it says <img src="image" alt="Working In: Pennsylvania" />. If you want to complete Facility Admin tasks, ensure that it lists the name of your facility. Example: <img src="image" alt="Working In: Facility Name" />. If you want to complete Legal Entity Admin tasks, ensure that it lists the name of your legal entity. Example: <img src="image" alt="Working In: Legal Entity Name" />. If the node is not correct for the tasks you want to complete, then click Change Hierarchy Node, by clicking on <img src="image" alt="Change Hierarchy Node" />, select the appropriate node (Pennsylvania for PQAS tasks, the Facility Name for Facility Admin tasks, the Legal Entity Name for Legal Entity tasks) from the dropdown list and click the button labeled Choose Selected.</td>
</tr>
</tbody>
</table>