

United States Department of Agriculture

Food and Nutrition Service



Manager and Director Role User Manual for Professional Standards Training Tracker Tool (PSTTT)

May 2023

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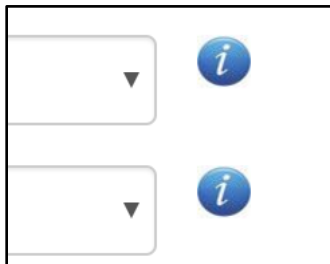
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Glossary

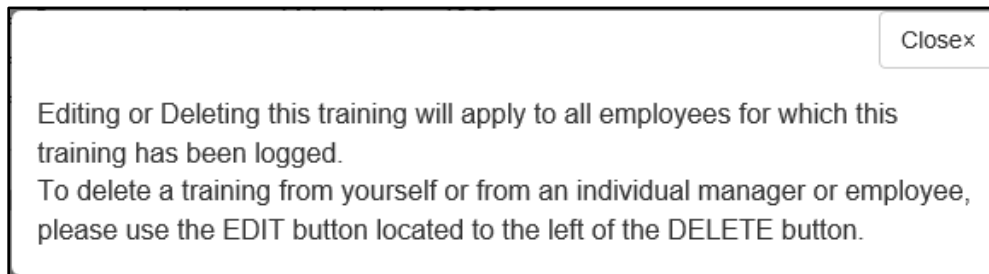
Acronym	Description
PSTTT	Professional Standards Training Tracker Tool
FNS	Food and Nutrition Service
USDA	United States Department of Agriculture
* (Use of the asterisk)	On form pages within PSTTT, the asterisk character is used to note that the field is required for the form shown on the page.

Information Icons: “i”

Some fields on some pages within the application have a small, blue circle icons labeled “i” (in white italic text). These are information icons that, when clicked, provide information relevant to the field to which they are associated.



Below is an example of the information that will pop up when clicking the “i” icon. This page shows the Manager role’s Edit Training, pop-up text window:



This manual has sections dedicated to each page. We will be showing the specific wording for each information icon with the page on which it appears.

1 Introduction

The Web-based Professional Standards Training Tracker Tool (PSTTT) has been created by the Food and Nutrition Service (FNS), an agency of the United States Department of Agriculture (USDA), to provide an easy and accessible way for school nutrition professionals to keep track of their annually required training hours.

The web-based Professional Standards Training Tracker Tool (PSTTT) provides users with many improved features, including:

- Database of training titles which allow users to select the course information and have additional elements such as length of the course (i.e. training hours) and training provider to auto-populate.
- User controls that allow them to add, edit, upload training documents, or delete training records for themselves.
- Manager controls that allow managers to inherit employees/staff based upon the manager's user profile settings, to maintain training records for their employees/staff, including logging a training record for multiple people at the same time.
- Provide all users with information regarding:
 - How many training courses they have logged,
 - What types/categories of training were provided in the training course (i.e. Key Area, Training Topic, and Learning Objectives),
 - Length of the training for each course, and
 - How many hours remain to be completed to fulfill the annual training requirement.
- Additional databases of schools built from the Department of Education information, which will allow users to quickly select their school. If needed, school-related users can also Add New Schools into this database.
- There are other time-saving features, such as: reports, and the auto-population of school contact information, and making this tool more user-friendly and easier to navigate.

1.1 Accessibility

Please report website accessibility problems to cnpntab@usda.gov via email or using the Contact Us feature of the application (as described in Section 4.4.4). In your message, include the page address or URL and the specific problems you have encountered.

1.1.1 Keyboard Navigation

The PSTTT application can be navigated without a mouse using the keyboard only. Use the following shortcuts to navigate PSTTT screens:

- **Menus:**
 - ***Tab*** and ***Shift + Tab*** to move between items in the main menu
 - ***Down Arrow*** to open a menu

- *Tab* and *Shift + Tab* to move between sub-menus
- *Enter* to open a sub-menu
- **Accordions:**
 - *Up and Down Arrows* to move between accordions
 - *Enter* to open an accordion
 - *Enter* to collapse an accordion
 - *Tab* to move down within accordion body
 - *Shift + Tab* to move up within accordion body
 - *Shift + Tab* to move up from accordion body to the accordion header
- **Text Fields:**
 - *Tab* into a text field, type in a value, then *Tab* to the next control
- **Drop-downs:**
 - *Tab* into a drop-down and use *Up and Down Arrows* to select a value, then *Tab* to the next control
- **Radio Buttons:**
 - *Tab* into a radio button group and use *Left and Right Arrows* to select a value, then *Tab* to the next control
- **Buttons:**
 - *Tab* onto a button, then press *Enter* to activate it
- **Links:**
 - *Tab* onto a link, then press *Enter* to activate it
- **Tooltips:**
 - *Tab* onto a tooltip anchor (“i” in a circle) to bring up the tooltip bubble with text
 - *Tab off* a tooltip anchor to close the tooltip bubble with text
- **Pagination Controls:**
 - *Tab* between page number buttons
 - *Enter* on page number button to display the corresponding page
 - *Enter* on First, Last, Next, and Previous buttons to display the corresponding page
- **Training Video Page and Video Player:**
 - *Tab* between the Chapter headings, and use *Enter* to expand a Chapter. *Tab* between the sub-chapters. Use *Shift+Tab* to go back. Use *Enter* on a sub-chapter heading to load it into the video player.
 - *Tab* onto the video player, then
 - *Tab* onto the main Play button that overlays the video, then
 - *Tab* to video player controls
 - *Tab* to move between video player controls
 - *Shift + Tab* to move backwards between video player controls
 - *Enter* to press the Play buttons
 - *Tab* onto the Progress Bar and use *Left and Right Arrows* to scroll, *Tab* off
 - *Tab* onto the Caption Control and use *Up and Down Arrows* to choose None or a Language, *Tab* off
 - *Tab* onto the Full Screen Control and use *Enter* to activate full screen mode, *Escape* to exit

1.2 Overview

1.2.1 Key Information

Site URL: <https://pstrainingtracker.fns.usda.gov/>

1.2.2 Site Header

The site header is a collection of images showing the following:

- USDA Logo Image
- USDA Department Name: U.S. Department of Agriculture
- Site Title: Professional Standards Training Tracker Tool
- Image of 5 smiling people representing the Nutrition Professionals who might be logging their required training in PSTTT

1.2.3 Site Footer

The site footer contains 12 hyperlinks arranged at the bottom of the page. The links found in the footer remain consistent throughout the application. There are no other objects in the footer, except these links. Here are the links available:

- [FNS](https://www.fns.usda.gov/) (https://www.fns.usda.gov/)
- [CNPP](https://www.fns.usda.gov/cnpp) (https://www.fns.usda.gov/cnpp)
- [USDA](https://www.usda.gov/wps/portal/usda/usdahome) (https://www.usda.gov/wps/portal/usda/usdahome)
- [FOIA](https://www.dm.usda.gov/foia/) (https://www.dm.usda.gov/foia/)
- [USDA Policies and Links](https://www.usda.gov/policies-and-links) (https://www.usda.gov/policies-and-links)
- [Accessibility Statement](https://www.fns.usda.gov/web-accessibility-statement) (https://www.fns.usda.gov/web-accessibility-statement)
- [Privacy Policy](https://www.usda.gov/privacy-policy) (https://www.usda.gov/privacy-policy)
- [Information Quality](https://www.fns.usda.gov/information-quality) (https://www.fns.usda.gov/information-quality)
- [No Fear Act](http://www.usda.gov/nofear/fns/indexfns.html) (http://www.usda.gov/nofear/fns/indexfns.html)
- [Nondiscrimination Statement](https://www.fns.usda.gov/usda-nondiscrimination-statement) (https://www.fns.usda.gov/usda-nondiscrimination-statement)
- [USA.gov](https://www.usa.gov/) (https://www.usa.gov/)
- [Whitehouse.gov](https://www.whitehouse.gov/) (https://www.whitehouse.gov/)

1.3 User Categories and Roles

PSTTT has three User Categories:

1. SCHOOL: Any user belonging to school type organization. Refer to School Types Guidance Chart for more information.
2. STATE: State Agency Personnel
3. USDA: USDA Staff.

Within each User Category, users are assigned a Role:

1. Director: responsible for tracking and recording training hours for all staff in the district/organization

2. Manager: responsible for tracking and recording training hours for only staff you supervise (ex. Supervisor for one or more schools, but not the entire district)
3. Employee or Staff: responsible for tracking and recording training hours only for yourself
4. Training Director (Multiple Districts): responsible for tracking and recording training hours for all staff in multiple school districts.

1.4 Additional Resources or Assistance

This manual has been put together to walk users through the general usage steps. If there are additional questions or concerns, please send an email to: cnpntab@usda.gov.

2 Logging In and Creating a User Profile

In order to log into PSTTT, the users must have an USDA eAuthentication account for PSTTT. The USDA eAuthentication account allows the user to enter USDA Website portals and applications using a login and password.


USDA eAuthentication accounts are created and managed outside of the Professional Standards Training Tracker Tool (PSTTT). The chapter sections will walk you through the user account creation and login steps.

2.1 PSTTT Page (the “About” page)


This is the page that will display each time you come back to the main site URL (see graphic of the page below).

It provides the user with:

- the site’s OMB Number and Expiration Date
- a site summary text area, including a hyperlink for the Professional Standards site
- an USDA eAuthentication information text area (i.e. this section has a blue outline, and starts with “PLEASE NOTE”)
 - Includes a hyperlink to direct the user to create a new USDA eAuthentication account
- a contact email for users needing login assistance
- the OMB Burden statement
- the “Login with eAuth Account” button
- and the bottom navigation bar linking to other USDA, FNS, and government sites

 An official website of the United States government [Here's how you know.](#)

Professional Standards Training Tracker Tool
U.S. DEPARTMENT OF AGRICULTURE



Professional Standards Training Tracker Tool

OMB Number: 0584-0626
Expiration Date: 08/31/2023

The USDA Child Nutrition Program's Professional Standards Training Tracker Tool (PSTTT) is designed to assist School Nutrition Professionals in keeping track of their annually required training hours. For additional information on Professional Standards, please visit USDA Professional Standards site at <https://www.fns.usda.gov/cn/professional-standards>.

PLEASE NOTE: An USDA eAuthentication account is needed to access the tool. New and existing users who have an USDA eAuthentication account can proceed to the Tool by clicking on the 'Login with eAuth Account' button.

If you do not have an USDA eAuthentication Account, go to [Create Account](#). You will immediately receive an email with a link to activate your account with one simple click.

The following training videos may be helpful in creating or setting up a new eAuth account:

- [Create a new eAuth Account](#)
- [Login for the first time](#)

Contact cnptab@usda.gov for assistance in accessing the site.

[Login with eAuth Account](#)

OMB Burden Statement:
This information is being collected to assist the Food and Nutrition Service as it helps local educational agencies and school food authorities to meet the training requirements and assist in keeping track of training as required by the Healthy Hunger Free Kids Act. This is a voluntary collection and information entered into the free web-based application tool is solely for the benefit of the local education agencies and school food authority's staff for the tracking of training and storing staff training information. According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0584-0626. The time required to complete this information collection is estimated to average 1 hour and 12 minutes (1.208 hours) per response, including the time for reviewing instructions, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: U.S. Department of Agriculture, Food and Nutrition Service, Office of Policy Support, 1320 Braddock Place, 5th Floor, Alexandria, VA 22314 ATTN: PRA (0584-0626).

Privacy Act Notice

Authority: This information is being collected under the authority of [Healthy Hunger Free Kids Act 2010](#), a reauthorization of the Child Nutrition Act.

Purpose: The Professional Standards Training Tracker Tool (PSTTT) is designed to help school nutrition professionals track their annual training hours for professional standards as required by the [Healthy Hunger-Free Kids Act \(HHFKA\) 2010 \(Section 306\)](#).

Routine Uses: The PSTTT is used optionally by school nutrition professionals to track their annual training hours for professional standards as required by the [Healthy Hunger-Free Kids Act \(HHFKA\) 2010 \(Section 306\)](#).

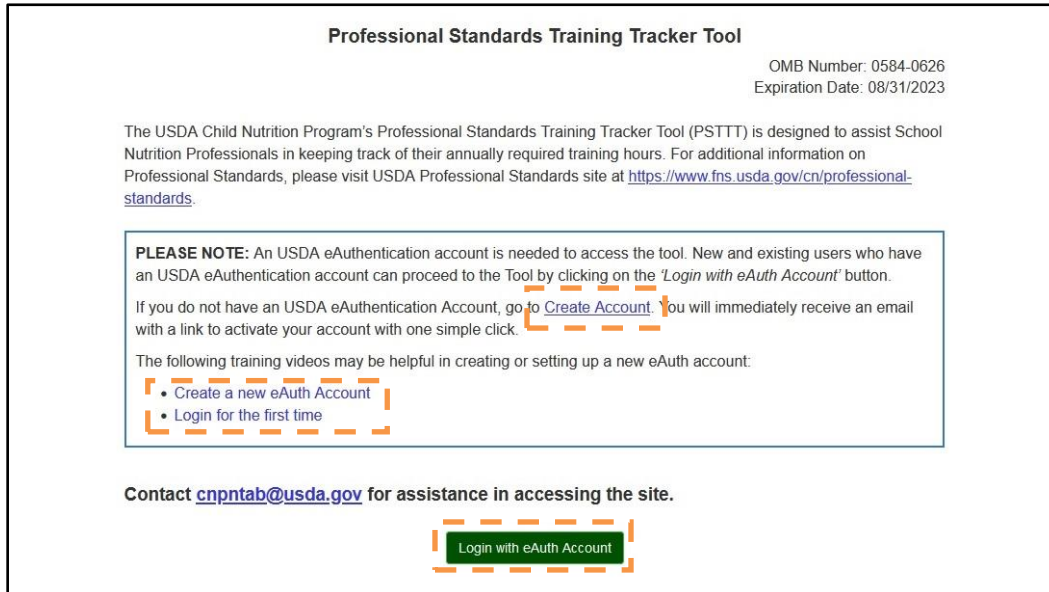
Disclosure: Disclosing the information is voluntary. Failure to provide accurate information when creating the user profile will prevent school nutrition professionals from accessing the full capabilities of the PSTTT.

FNS | CNRP | USDA | FOIA | USDA Policies and Links | Accessibility Statement | Privacy Policy | Information Quality | No Fear Act | Nondiscrimination Statement | USA.gov | Whitehouse.gov

2.2 PSTTT Page Elements

The tracking tool’s “About” page contains all the elements needed to access the tool.

All users who currently hold an eAuthentication account, can continue to enter the site by clicking on “Login with eAuth Account” button at the bottom of the page. Please see Section 2.3 “Login to PSTTT – eAuthentication” of this manual for more information.



To create a new eAuthentication account the user would click the “Create Account” link. Please see Section 2.3.12.3.1, “Create a New eAuthentication Account” of this manual for more information.

The eAuthentication section, also contains two training video links. These videos will walk users through creating an eAuthentication account and setting up their profile inside PSTTT (required at when logging in for the very first time).

2.3 Login to PSTTT - eAuthentication

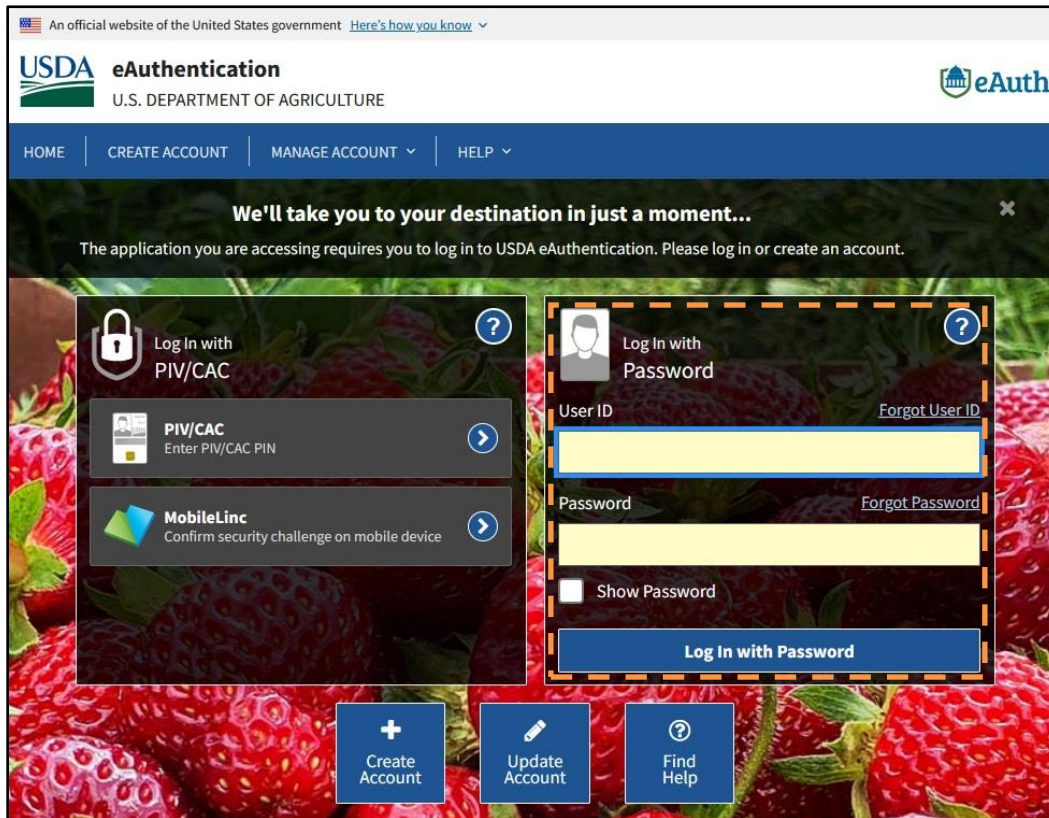
The user clicks the “Login with eAuth Account” button, on the “About” page. The user will be sent to the eAuthentication Login page. This page provides User ID and Password fields, links that will allow you to recover a forgotten ID or Password or to Change your Password, and a “Register” and “Login” buttons. It also provides a lot of information regarding the eAuthentication system.

To login the user should enter in their eAuthentication account User ID and Password and click the “Login” button.

The “Register” button may also be used to create an account. Please see Section 2.3.1 “Create a New eAuthentication Account” of this manual. The eAuthentication section of the

“About” page, contains a link to the “Create a new eAuth Account” video. This video will show how to create an eAuth Account.

Please see the image of the eAuthentication Login page below. This manual does not cover the function of the eAuthentication system, as it is separate from PSTTT.



2.3.1 Create a New eAuthentication Account

After the user clicks the “Create Account” hyperlink in the eAuthentication section of the “About” page, or the “Register” button on the eAuthentication site, they will be brought to the eAuthentication Account Registration page. The user will be asked to select type of user (Customer or USDA Employee), enter in the email address, and submit.

A confirmation page will be displayed with a message stating that an email was sent to the email address entered. Clicking the “Confirm email address” button provided in the email message will redirect the user to the eAuth registration page to complete the registration process to enter in the name and create a password. The email address will become the eAuthentication ID.

2.4 Create Your Profile – First Time Entry Only

Once you have created your eAuthentication account, you can return to PSTTT and use your User ID and Password to login to the tool. For your initial account login, the tool will prompt you to create a user account in PSTTT.

NOTE: If a non-eAuthenticated user account has been already created for you by your manager with the email address, first name, and last name matching your eAuthentication account, the two accounts will automatically be combined in the Training Tool. In this case, you will not be asked to create a new profile when logging in for the first time, and you will see training records if any were logged for you previously.

2.4.1 Available User Categories, Roles, and Job Titles

It is important that you select the correct User Category, Role, and Job Title while creating your account.

- **User Category** will determine the organizational structure your account will be associated with. For example, School users will need to select a school district and one or more schools to be associated with.
- **Role** will determine the functionality available to you, and the set of data you will be able to view.
- **Job Title** will determine your number of required training hours.

PSTTT has three User Categories:

1. **SCHOOL:** Any user belonging to school type organization. Refer to School Types Guidance Chart for more information.
2. **STATE:** State Agency Personnel
3. **USDA:** USDA Staff.

Within each User Category, users are assigned a Role:

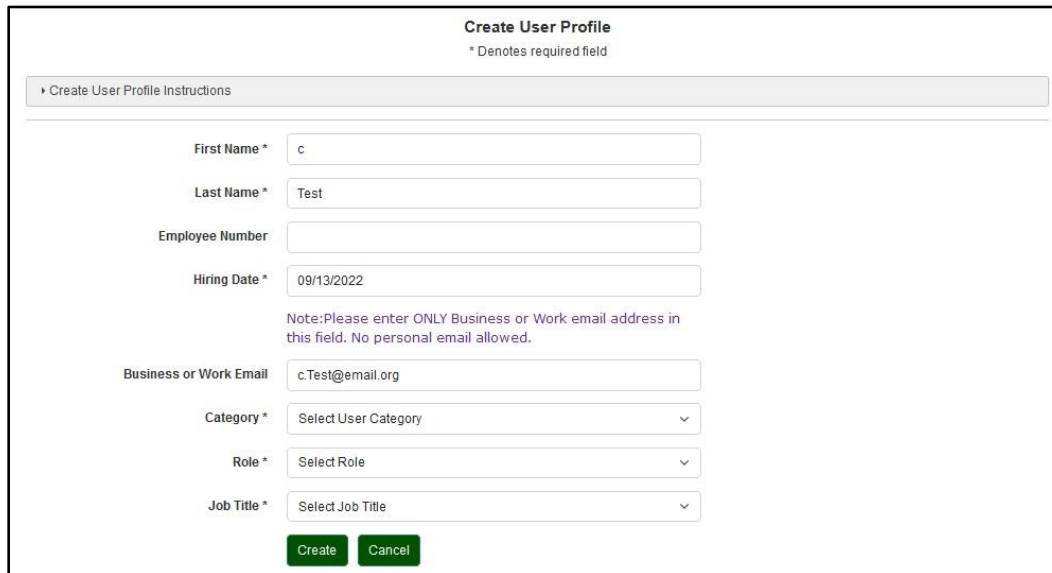
1. **Director:** responsible for tracking and recording training hours for all staff in the district/organization
2. **Training Director (Multiple Districts):** responsible for tracking and recording training hours for all staff in multiple districts
3. **Manager:** responsible for tracking and recording training hours for only staff you supervise (ex. Supervisor for one or more schools, but not the entire district)
4. **Employee or Staff Role:** responsible for tracking and recording training hours only for yourself

Each User Category and Role combination gives user access to one or more Job Titles. See the table below for the available User Category, Role, and Job Title combinations:

User Category	Role	Job Title
SCHOOL	TRAINING DIRECTOR (Multiple Districts)	School Food Authority - Training Director
	DIRECTOR	School Food Authority - District Director
		School Food Authority - Assistant Director
		School Food Authority - Staff Manager
		School Food Authority - Staff Full Time
		School Food Authority - Staff Part Time
		School Food Authority - Non-Food Service Employee
		School Food Authority - Volunteer
	MANAGER	School Food Authority - Staff Manager
	EMPLOYEE	School Food Authority - Staff Full Time
		School Food Authority - Staff Part Time
		School Food Authority - Non-Food Service Employee
		School Food Authority - Volunteer
STATE	DIRECTOR	State Agency - Director
		State Agency - Assistant Director
		State Agency - Staff
	MANAGER	State Agency - Staff
STAFF	State Agency - Staff	
USDA	MANAGER	FNS Manager
	MANAGER with Admin flag	FNS Manager

2.4.2 Step 1: Create User Profile

The “Create User Profile” page will automatically open when user logs in to PSTTT for the first time.



The first seven fields on the “Create User Profile” page will display for any user role. Required fields are denoted by the asterisk (*).

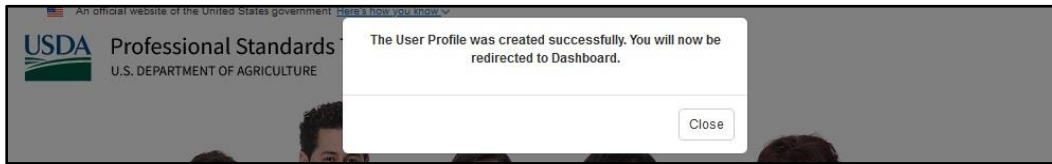
- **First Name** – required, read-only; pre-populated from the eAuthentication system.
- **Last Name** – required, read-only; pre-populated from the eAuthentication system.
- **Employee Number** – optional; employee ID or number in your system.
- **Hiring Date** – required; enter your date of hire for your current position.
- **Business or Work Email** – required, read-only; pre-populated from the eAuthentication system.
- **Category** – required; select the most appropriate value from the list: SCHOOL, STATE, or USDA.
- **Role** – required; select the most appropriate value from the list of values based on the Category you selected.
- **Job Title** – required; select the most appropriate value from the list of values based on the Category and Role you selected.

The set of fields displayed further on the “Create User Profile” page will depend on your User Category, Role and Job Title selections. Please see Sections 2.4.3 – 2.4.5 for more information.

The following actions are available:

- **Create** – save the data entered to create your user profile.
- **Cancel** – cancel all the changes and log out.

When finished with all required fields, click “Create” button to create your user profile. A confirmation dialog will be displayed.



You will be able to edit your profile settings later using the “Edit User Profile” page as described in Section 4.5.5.

2.4.3 Step 2a: Create User Profile – School User Category

The following fields are available for a user in the SCHOOL User Category. Required fields are denoted by the asterisk (*).

- **State** – required; select the most appropriate value from the list.
- **School District** – required; select the most appropriate value from the list of values based on the State you selected. Type the first letter of the school district name into this field to have it jump to the closest match, then continue selection from the drop-down.

NOTE: If your School District is not in the list, Director users can add a new school district (Refer to Section 2.5 for instructions). Manager and Employee-users can send requests to add a new district to cnpntab@usda.gov.

- **School** – required for Manager (multiple selection) and Employee (single selection) roles; select the most appropriate value from the list of values based on the School District you selected. School name is followed by its zip code in parenthesis. Type the first letter of the school district name into this field to have it jump to the closest match, then continue selection from the drop-down.
- **“Add New District” button** – available only for Director Role; click this button to add a new district. For more information see Section 2.5.
- **“Add New School” button** – not available for Director Role; click this button to add a new school. For more information see Section 2.6.
- **Manager** – not available for Director Role; select the most appropriate value from the list of values based on the School District you selected.

School Director view:

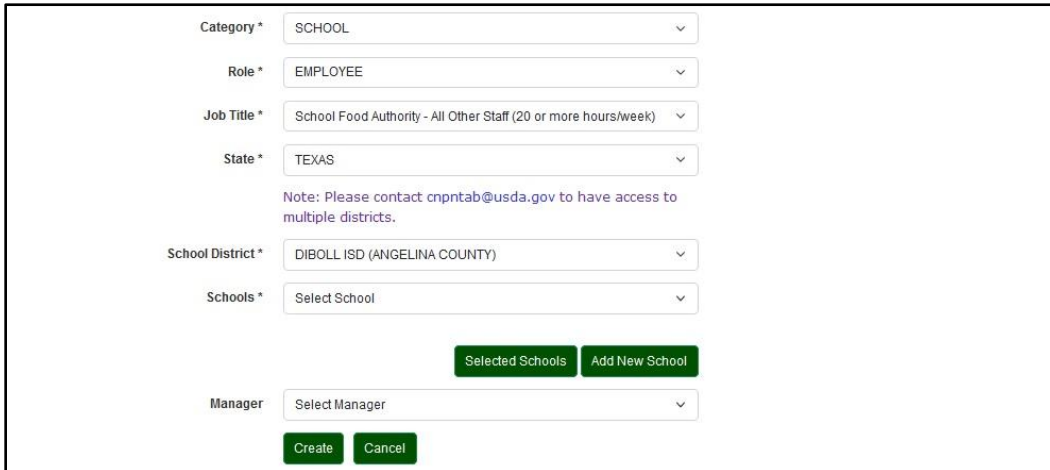
The screenshot shows a form for creating a School Director account. It includes dropdown menus for Category (SCHOOL), Role (DIRECTOR), Job Title (School Food Authority - District Director), State (TEXAS), and School District (DIBOLL ISD (ANGELINA COUNTY)). There is an 'Add New District' button and a note: 'Note: Please contact cnpntab@usda.gov to have access to multiple districts.' At the bottom are 'Create' and 'Cancel' buttons.

NOTE: To manage multiple school districts, create a Director account and then contact FNS staff at cnpntab@usda.gov with the request to grant the Training Director (Multiple Districts) role.

School Manager view:

The screenshot shows a form for creating a School Manager account. It includes dropdown menus for Category (SCHOOL), Role (MANAGER), Job Title (School Food Authority - Manager), State (TEXAS), and School District (DIBOLL ISD (ANGELINA COUNTY)). There is a note: 'Note: Please contact cnpntab@usda.gov to have access to multiple districts.' Below this is a 'Schools' dropdown menu with a list of schools: 'Select School', 'CRIMSON CHRISTIAN ACADEMY (75941)', 'DIBOLL ADMINISTRATION (75941)', and 'DIBOLL H S (75941)'. There are 'Selected Schools' and 'Add New School' buttons. At the bottom is a 'Manager' dropdown menu and 'Create' and 'Cancel' buttons.

School Employee view:



Press the “Create” button to save your selections. See Sections 4.5.4 and 4.5.5 for information on how to view and edit your profile.

2.4.4 Step 2b: Create User Profile – State User Category

The following fields are available for a user in the STATE User Category:

- **State** – required; select the value for your State Agency from the list.
- **Manager** – not available for Director role; select the most appropriate value from the list of values based on the State you selected.



2.4.5 Step 2c: Create User Profile – USDA User Category

The following fields are available for a user in the USDA User Category. Required fields are denoted by the asterisk (*).

- **FNS Office** – required; select the value for your USDA FNS Offices’ registered location from the list.
- **Manager** – select the most appropriate value from the list of values based on the USDA FNS Office you selected.

A screenshot of a web form with the following fields:

- Category * (dropdown menu, value: USDA)
- Role * (dropdown menu, value: MANAGER)
- Job Title * (dropdown menu, value: FNS Manager)
- FNS Office * (dropdown menu, value: Select USDA FNS Office)
- Manager (dropdown menu, value: Select Manager)

At the bottom of the form are two green buttons: "Create" and "Cancel".

2.5 Adding a New School District (School User Category Only)

Clicking the “Add New District” button opens Add New District pop-up. You will need to select your State and School District on the “Create User Profile” page before clicking the “Add New School” button because users are only allowed to add schools to their school district, and the corresponding fields are not editable on the pop-up dialog.

A screenshot of the "Add New District" pop-up dialog. The dialog has a close button (X) in the top right corner. It contains the following fields:

- * Denotes required field
- State/Territory * (dropdown menu, value: TEXAS)
- County * (dropdown menu)
- District Name * (text input field)
- Zip * (text input field)

Below the fields is a message: "Once you save, you will return to your Profile page. Remember to select your new district from the available list." At the bottom are two green buttons: "Save" and "Cancel".

The following fields are available on Add New District pop-up. Required fields are denoted by the asterisk (*).

- **State/Territory** – required.
- **County** – required, populated based on the State selected.
- **District Name** – required; enter your district name.
- **Zip** – required; enter mailing address zip code.

NOTE: The combination of the District Name and County is required to be unique.

The following actions are available:

- **Save** – save the data entered to create a new school district record.
- **Cancel** – cancel all the changes and close the Add New District dialog.

Fill out the required fields and then click Save. You will return to the previous “Create User Profile” page where you will be able to make the selection in the School District field.

2.6 Adding a New School (School User Category Only)

Clicking the “Add New School” button opens Add New School pop-up. You will need to select your State and School District on the “Create User Profile” page before clicking the “Add New School” button because users are only allowed to add schools to their school district, and the corresponding fields are not editable on the pop-up dialog.

The following fields are available on Add New School pop-up. Required fields are denoted by the asterisk (*).

- **State/Territory** – required; populated with your State.
- **School District** – required; populated with your District.
- **School Type** – required. Please select your school type.
- **School Name** – required. Please enter the full, official school name.
- **Address** – Please enter the street address.
- **City** – required. Please enter the City from the School’s mailing address.
- **Zip** – required. Please enter the Zip Code from the School’s mailing address.

NOTE: The combination of the School Name and Zip is required to be unique.

The following actions are available:

- **Save** – save the data entered to create a new school record.
- **Cancel** – cancel all the changes and close the Add New School dialog.

Fill out the required fields and then click Save. You will return to the previous “Create User Profile” page where you will be able to make the selection in the School(s) field.

3 PSTTT Home Page (Dashboard)

After logging into PSTTT, the user will see the “Home” page displayed. This page can also be accessed from the Top Navigation Menu by using the “Home” button.

The “Home” page displays:

1. the site header, top navigation menus, and a small introduction paragraph on the purpose of PSTTT
2. the training calendar countdown – how many hours are required and how many days are left,
3. training badges earned (if any),
4. the list of up to 5 most recent trainings sorted first by the school year, and the by Date Completed.

The screenshot shows the PSTTT Home Page. At the top left is the USDA logo and the text "Professional Standards Training Tracker Tool U.S. DEPARTMENT OF AGRICULTURE". Below this is a navigation bar with links: Home, Training, Employees, Reports, Online Resources, Help, and Welcome A Test. A large banner features five diverse people. Below the banner is a welcome message: "Welcome to the Professional Standards Training Tracker Tool (PSTTT)!". A paragraph follows: "The PSTTT provides easy navigation and user-friendly time saving features! Some of the features include a database of trainings to auto-populate training information, the ability for managers to enter trainings for multiple employees, reminder alerts for remaining annual training requirements, and notifications for annual training requirement completion. Please click on [info icon] for helpful tips. 12/1/2020". A blue notification bubble says "2 You Have 211 Days To Complete 7.50 Hours of Training." Below this are two circular badges: "3 BADGE" and "OPERATION". A section titled "Recent Trainings (up to 5 latest trainings taken):" contains a table with 4 columns: Training, School Year, Date Completed, and Hours Completed. The table lists three training entries.

Training	School Year	Date Completed	Hours Completed
EPISD- CIT- INTRODUCTION/CLASS RULES/CIT CONTRACT	2020-2021	9/1/2020	1:00
CENTRALIZED ORDERING & HACCP TRAINING	2020-2021	8/11/2020	3:30
CT1 - INTRODUCTION	2019-2020	5/12/2020	1:00

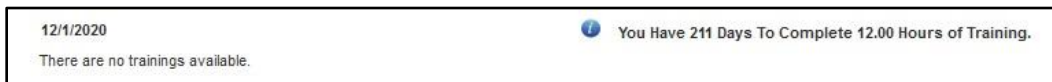
3.1 PSTTT Introduction Text

This section of text provides the user with a welcome statement, and a recap of the changes that users can expect in the current version.

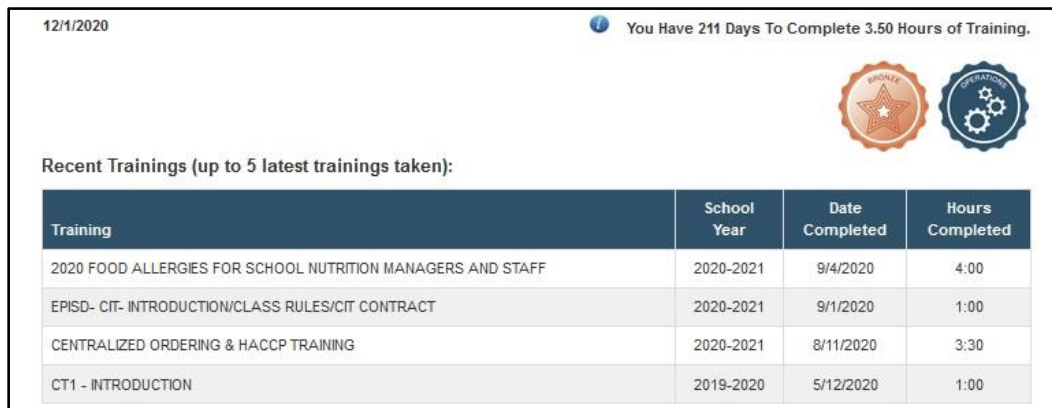
3.2 Calendar Countdown

Each nutrition professional is required to meet a minimum training standard each year. The actual value needed is determined by the job title of the user.

This function provides the user with the current date, the number of hours left to meet the training requirement, and how many days are left in the school year - in order to meet their goal. (The school year starts/ends on July 1st of a given year.)



Once a user has met the minimum training requirements, this message will change to a Congratulations message, and will allow the user to print out a certificate for use in their annual/periodic review by pressing the “Print/Save Certificate” button.



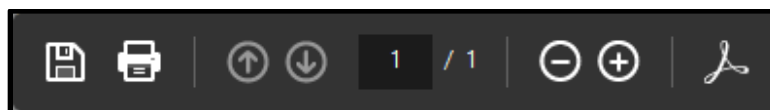
3.3 Training Certificate

After you click the “Print/Save Certificate” button, a PDF certificate will display with the following information listed:

- Your Full Name
- Employee Number
- Job Title
- Required Training Hours
- Completed Training Hours
- Today’s Date
- School Year
- Training Badges Earned



The Download and Print options appear as a floating bar towards the bottom of the page containing the Save a Copy, Print (Ctrl + P), Page Up (grayed out), Page Down (grayed out), 1 (Go to a specific page) / 1 (Total number of pages), Zoom Out, Zoom In, Show Adobe Acrobat Reader Toolbar symbol controls.



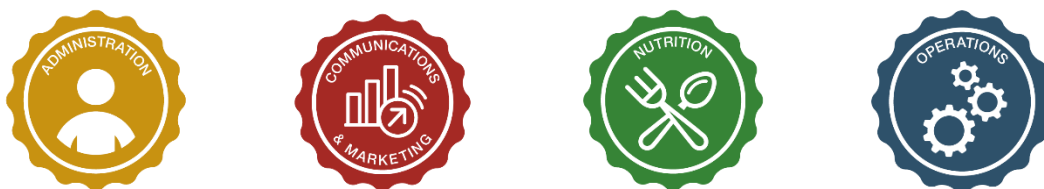
3.4 Training Badges Earned

Make the completion of annual training requirement exciting by rewarding and motivating staff with badges.

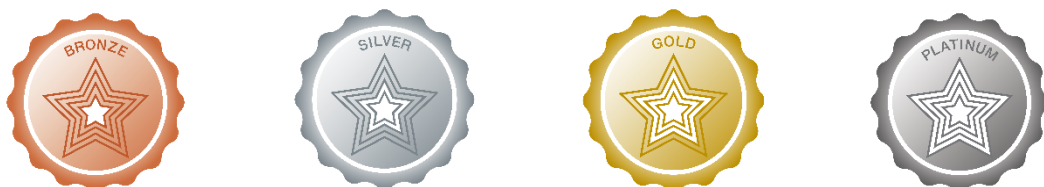
Each of the trainings covers topics in one or more Key Areas:

- Nutrition
- Operations
- Administration
- Communications and Marketing

To earn a badge for a particular Key Area for a school year, the user needs to complete two trainings covering topics from that key area:



At the same time, a user earns a cumulative achievement badge, which reflects the number of Key Area badges earned: a Bronze badge for one Key Area badge earned, Silver for two, Gold for three, and Platinum for four:



3.5 Recent Trainings

Recent Trainings are also displayed on the “Home” page. This data area displays the Training Title, School Year, Date Completed, and Hours Completed for the last 5 trainings logged - according to the Date Completed.

This data is displayed in a table format on the page.

3.6 Email Reminders

PSTTT sends out automatic email reminders for users to complete their required training hours twice a year, on April 1st and October 1st. Individual emails are sent to users who have not completed their required training hours. Users who have no required training

hours assigned based on their Job Title or have completed their required training hours do not get an individual email.

The emails are titled “Reminder to Complete the Required Professional Standards Training Hours for the School Year” and have the following format:

Hello Jessica Bryan,

You have Professional Standards training records logged for your profile in the USDA Professional Standards Training Tracker Tool (PSTTT). This tool tracks training records by School Year. These records may have been entered by you, or your manager.

As part of a biannual reminder, your profile with our system shows the following information:

Annual required training hours: 12:00

Training hours logged in PSTTT: 06:00

Summary: You have 54 days remaining to complete your required hours for the 2020-2021 school year.

Click on following link to open the Professional Standards Training Tracker Tool to review your records or enter additional training records: <https://pstrainingtracker.fns.usda.gov>

Please direct questions first to your manager, and then to PSTTT administrators at cnpntab@usda.gov. You may also use the Contact Us page once you have logged into the tool.

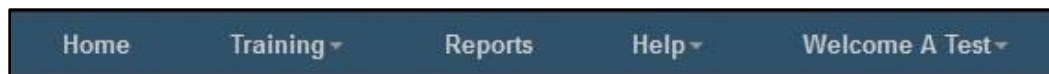
This is an autogenerated message. Please do not reply to this email.

Regards,
Professional Standards Training Tracker Tool
USDA, Food and Nutrition Service

The email will be sent from the donotreply@usda.gov email address. Please do not reply to this email.

4 Top Navigation Menus

PSTTT main menus are located at the top of the page. The menu items remain consistent throughout the site.



- **Home** - Returns the user to the site Dashboard, showing recent trainings and a Calendar Countdown message.
- **Training** - Provides access to view the Training Title list and to Log Training (record a completed training).
- **Reports** - Opens the reports area where a user may print reports.
- **Help** - The user will find the User Guide, Training Videos, and Contact Us in this menu.
- **Welcome 'User Name'** - Provides navigation to the user's Profile, Training History, Certificates, and site Logout. The username field is customized for each user, in the menu header.

A user signed on will have the ability to track their own required training hours, print a certificate once required hours are met, and run detailed or summary reports.

The Manager User has expanded options available to them. For their own records, they have access to everything that a school or state agency employee user would be able to access. In addition, the Manager role has access to the “Employees” menu, which provides an Employee Search feature, and a virtual roster. Managers may add, edit or delete training records for any employee on their roster. Please see the Functions/Features of Manager Users for more details on the additional privileges granted to Manager Users.

All pages accessible from the top navigation menu, will display the site header and footer sections. As we go through the following pages, we will focus on the main content for each page.

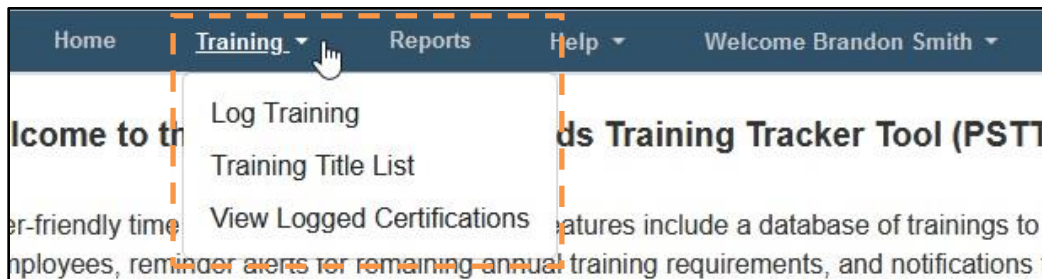
4.1 Home Menu

This top navigation bar and the buttons/menus on it are accessible from anywhere on the site.



The “Home” top navigation button will take the user back to the “Home” page.

4.2 Training Menu



The “Training” dropdown menu has the following options:

- **Log Training** – enter new trainings
- **Training Title List** – view training titles available
- **View Logged Certifications** – view logged certifications.

4.2.1 Log Training

The “Log Training” option under the “Training” menu opens the “Log Training” page which allows users to enter in all the relevant information related to their training that they are in the process of completing or have completed.

The “Log Training” page has two groups: the training information and the Employee selection.

The following training information will display for any user role: Training Title, Training Categories, Training Provider, Training Format, Training Length (Hours and Minutes), Completion Date, School Year, and Comments. Required fields are denoted by the asterisk (*).

Log Training
* Denotes required field

Training Title * Please start typing and the USDA Professional Standards Training Database list will auto-populate in the following format: Training Title (Provider, Format).

 If you do not find your training listed, please add the training title by clicking on the 'Add New Training Title' button below.

Training Categories *
 Select all Training Categories in the table below

Select	Key Area	Training Topic	Learning Objective
<input type="checkbox"/>	Nutrition - 1000	General Nutrition - 1300	1310-Dietary Guidelines for Americans, MyPlate, and School Nutrition
<input type="checkbox"/>	Nutrition - 1000	General Nutrition - 1300	1320-General Nutrition

Training Provider

Training Format

Training Length **Hours** **Minutes**

Completion Date *

School Year *

Comments

- **Training Title** – required; a dynamic search field.
 - Enter a few letters or a word, and a drop-down populated with the training titles matching the string entered will be displayed.

Training Title * Please start typing and the USDA Professional Standards Training Database list will auto-populate in the following format: Training Title (Provider, Format).

 BOURBON/SEASONING OF VEGETABLES (JUDITH GURNEE, Face-to-Face)
 Crediting Fruits, Vegetables and Food Buying Guide (GUSD Colorado DOE, Other)

- Training title information is displayed in the following format: Training Title (Training Provider, Training Format)
- Search is performed on Training Title and Training Provider values.
- Enter more words to narrow down the selection until the best possible match is found.
- Click on the training title to select it.
- If the training title you are searching for is not listed, click the “Add New Training Title” button to create it (see Section 4.2.2.2).
- **Training Categories** – required; a combination checkbox field that is populated once a Training Title is selected.
 - Select all combinations that apply by clicking on checkboxes.
 - Use the “Select all Training Categories in the table below” checkbox to select all rows.
 - The training categories available for a training are set when a training title is created in the database. If there is a category needed for a training that is not available, please contact the PSTTT help at cnpntab@usda.gov.
- **Training Provider** – a non-editable field that displays the provider of the selected Training Title.
- **Training Format** – a non-editable field that displays the format of the selected Training Title.
- **Training Length (Hours and Minutes)** – non-editable fields that display the duration of the selected Training Title.
- **Completion Date** – required; completion date of the training. Use the calendar option to select a date. The date cannot be in the future.
- **School Year** - required; the school year for the training. Use the drop-down to select a value.
- **Comments** – enter comments, if any.

The **Employee selection field** allows the user to select their name for the training to be documented.

- Employee Name, Employee Number, and Role are listed for the employee, and for School User Category employee their schools are listed as well.
- This is a required field, so the checkbox must be selected.

To add this training to your training history page, please choose the name outlined below and click the Record Training button.

Search:

Select	Employee Name	Employee Number	School Name	Role
<input type="checkbox"/>	Smith, Brandon	143567	BLUE ROCK MIDDLE SCHOOL	EMPLOYEE

The Search field narrows down the selection of employees when you type in one or more keywords, but you will not need to use it since you will only see your own name in the table.

NOTE: If your Hiring Date is after the School Year selected for this training, or your PSTTT account was inactive during the School Year selected, the Employee selection field will be empty.

The following actions are available:

- **Log Training** – save the data entered to save a new training record.
- **Cancel** – return to Dashboard.

After entering all the required information, press the “Log Training” button to save a new training record.

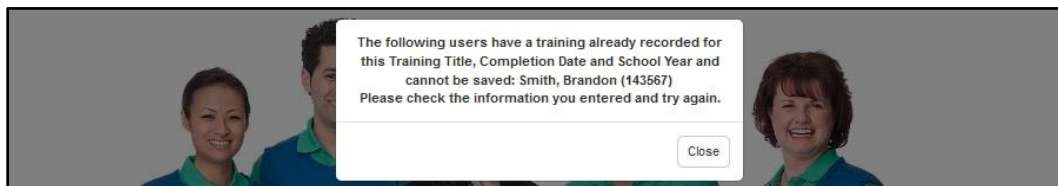
To add this training to your training history page, please choose the name outlined below and click the Record Training button.

Search:

Select	Employee Name	Employee Number	School Name	Role
<input type="checkbox"/>	Smith, Brandon	143567	BLUE ROCK MIDDLE SCHOOL	EMPLOYEE

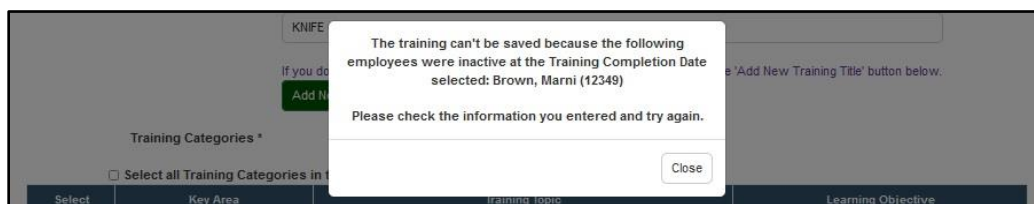
NOTE: Data entered will be checked for the employee selected to make sure no duplicate training records are being created. Uniqueness of a training record is determined by checking the combination of Employee, Training Title, Completion Date, and School Year.

If duplicate trainings are found, user is notified by an error message:



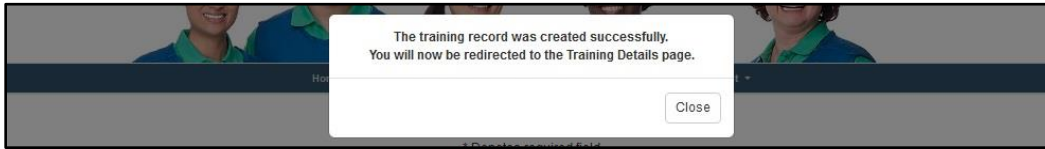
NOTE: Data entered will be checked for the employee selected to make sure that training’s Completion Date is during a period when employee’s PSTTT account was active.

If the Completion Date does not fall into a period when the employee’s PSTTT account was active, user is notified by an error message:



Press the “Close” button on the dialog, and then correct the data and press the “Log Training” button again.

Once the training is successfully saved, user is notified by a confirmation dialog:



Press the “Close” button on the confirmation dialog to go to the “Training Details” page (see Section 4.2.1.1). Training information can be later edited if necessary – see Section 4.2.1.2.

4.2.1.1 Training Details

The “Training Details” page provides a view of all the details for the training.

The following information is shown for the training:

- **Training Title**
- **Training Categories** – combinations of Key Area, Training Topic, and Learning Objective selected
- **Training Provider**
- **Completion Date**
- **School Year**
- **Length of Training**
- **Comments**
- **Employees** – a list of employees who participated in this training.

NOTE: Inactive employees who participated in the training, if any, will be listed in the “Invalid Employees” section below the “Employee” section.

- **Training Documents** – documents uploaded
- **Certifications Logged** – associated certifications logged by user or Manager (see Section 4.2.3)

Training Details			
Training Title		ALLERGY AND ANAPHYLAXIS	
Training Categories			
#	Key Area	Training Topic	Learning Objective
1	Administration - 3000	Human Resources and Staff Training - 3400	3430-Training Plans and Tracking
Training Provider		EDUHERO	
Training Format		Webinar/Video/Online Training	
Completion Date		04/26/2023	
School Year		2022-2023	
Training Length		1 Hour(s) 00 Minutes	
Comments			
Employees		Smith, Brandon (143567)	
Certifications Logged			
Certification Name	Employee Name	Completion Date	Expiration Date
ALLERGY AND ANAPHYLAXIS Certificate	Smith, Brandon (143567)	2/26/2023	9/19/2023
<input type="button" value="Back to List"/> <input type="button" value="Edit Training"/> <input type="button" value="Upload Training Documents"/> <input type="button" value="Delete"/>			

The following actions are available:

- **Back to List** – returns the user to the User’s “Training History” page or “View Logged Trainings” page.
- **Edit Training** – opens the “Edit Training” page.
- **Upload Training Documents** – opens the “Upload Training Documents” page.
- **Delete** – allows the user to completely delete the training record and any documents uploaded.

NOTE: A user may edit, upload documents for, or delete training records for which the user has proper authority over all the training attendees.

If even one attendee is not under the user’s authority, then the “Training Details” page will display the message below, and “Back to List” will be the only button available:

NOTE: This training record cannot be modified or deleted. Please contact cnpntab@usda.gov for assistance.

4.2.1.2 Edit Training

To edit a specific training record, press the “Edit Training” button on the “Training Details” page as described in the previous section. The “Update Training” page displays the same set of fields as the “Log Training” page (see Section 4.2.1), however, the Training Title field is not editable.

The user can change the following information:

- **Training Categories** – required; a combination checkbox field that is populated once.
- **Completion Date** – required; completion date of the training. Use the calendar option to select a date. The date cannot be in the future.

- **School Year** - required; the school year for the training. Use the drop-down to select a value.
- **Comments** – enter comments, if any.
- **Employee** selected.

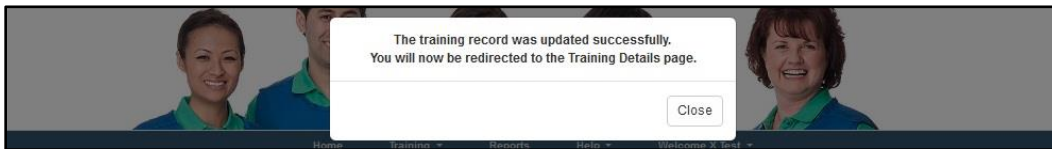
The following actions are available:

- **Save Training** – save the data entered to update training records.
- **Cancel** – cancel all the changes and return to the “Training Details” page.

NOTE: Data entered will be confirmed for the employee selected to make sure no duplicate training records are being created. Uniqueness of a training record is determined by checking the combination of Employee, Training Title, Completion Date, and School Year.

If duplicate trainings are found, user is notified by an error message listing all employees. Press the “Close” button on the dialog, and then correct the data and press the “Save Training” button again.

Once the training is successfully saved, user is notified by a confirmation dialog.



Press the “Close” button on the confirmation dialog to go to the “Training Details” page (see Section 4.2.1.1).

4.2.1.3 Upload Training Documents

Training classes often have informative handouts, and other elements that some people would like to keep with their training records. Use the Upload Training Documents functionality to upload documents for your training.

To upload documents for your training, press the “Edit Training” button on the “Training Details” page to access the “Upload Training Documents” page.

The user needs to enter the following information:

- **Document Title** – a descriptive title for the document.
- **Document Type** – select a document type.
- **Choose Document** – select a file in Adobe PDF, MS Word or MS Excel format, and less than 2.5 MB in size.

The following actions are available:

- **Upload** – upload the document.
- **Clear** – clear out the document information.

All files uploaded for this training will be displayed in the “Uploaded Documents” section of the page. Click on the document title to open and view the document.

Press the corresponding “Delete” button to delete the document. A confirmation dialog will be displayed.

Use the “Return to Training” button to go back to the “Training Details” page.

4.2.1.4 Delete Training

The “Delete” button on the “Training Details” page allows the user to delete an incorrectly entered training record. To prevent accidental deletion, a succession of two confirmation dialogs is displayed.

- **Step 1:** Click the “Delete” button. The system will open a confirmation dialog box. Click “Delete” to confirm or “Cancel” to cancel.

#	Key Area	Learning Objective
1	Operations - 2000	versus Serve

- Step 2: If “Delete” was pressed, the system will open the second confirmation dialog box. Click Yes to confirm or No to cancel.

#	Key Area	Please confirm you want to delete this training.	Learning Objective
1	Operations - 2000	<input type="button" value="Yes"/> <input type="button" value="No"/>	Versus Serve
Training Provider		SCHOO	

- Step 3: If “Yes” was pressed, the training record and all associated documents will be deleted. If “No” was pressed, “Training Details” page is displayed.

4.2.2 Training Title List

The “Training Title List” option under the “Training” menu opens the “Training Title List” page which allows users to search and view all training titles available in the system and their information.

The “Training Titles List” page displays training titles in a table with the following columns: Training Title, Training Provider, Training Format, and Training Length.

Training Title List			
Add New Training Title			
Show <input type="text" value="10"/> entries		Search: <input type="text" value="safety"/>	
Training Title	Training Provider	Training Format	Training Length
20-21 RRISD COVID SAFETY TRAINING	JESSICA JOHNSON	Webinar/Video/Online Training	1 Hour(s) 00 Minutes
2019 BELL COUNTY FOOD SAFETY TRAINING VIDEO	BELL COUNTY HEALTH - AISD VIDEO	Webinar/Video/Online Training	2 Hour(s) 00 Minutes
2019-2020 WPS FOOD HANDLER TRAINING	CINDY RICE, RS - EASTERN FOOD SAFETY	Face-to-Face	2 Hour(s) 00 Minutes
2019-2020 WPS REWIND & REPEAT: SCIENCE-BASED BASICS TO FOOD SAFETY, PART 1	SCHOOL NUTRITION ASSOCIATION	Webinar/Video/Online Training	1 Hour(s) 00 Minutes
2019-2020 WPS REWIND & REPEAT: SCIENCE-BASED BASICS TO FOOD SAFETY: PART 2	SCHOOL NUTRITION ASSOCIATION	Webinar/Video/Online Training	1 Hour(s) 00 Minutes
2019-2020 WPS SERV SAFE MANAGER TRAINING	CINDY RICE, RS - EASTERN FOOD SAFETY	Face-to-Face	6 Hour(s) 00 Minutes
2020 SFSP FOOD SAFETY	CDE	Webinar/Video/Online Training	0 Hour(s) 30 Minutes
21 SCHOOL SAFETY RULES	SCHOOL PRINCIPAL	Face-to-Face	0 Hour(s) 30 Minutes
2600 - FOOD SAFETY & HACCP	CAFETERIA MANAGER/CNS	Face-to-Face	0 Hour(s) 45 Minutes
2600 - FOOD SAFETY & HACCP/CONTACT SURFACES	CAFETERIA MANAGER/CNS	Face-to-Face	0 Hour(s) 15 Minutes

Showing 1 to 10 of 1,025 entries (filtered from 15,801 total entries) Previous 2 3 4 5 ... 103 Next

You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.

You can narrow-down the list of training titles displayed by entering one or more keywords in the Search field. Search is performed on Training Title and Training Provider values.

If the training title you are searching for is not listed, click the “Add New Training Title” button to create it (see Section 4.2.2.2).

You can click on the training titles to view their full detailed information.

4.2.2.1 Training Title Details

The “Training Title Details” page provides a view of all the details for the training title.

Training Title Details

Training Title ANNUAL ALLERGY TRAINING

Training Length 1 Hour(s) 15 Minutes

Training Format Webinar/Video/Online Training

Training Provider ABC DISTRICT

Additional Information

Created Date 09/15/2022

Training Categories

#	Key Area	Training Topic	Learning Objective
1	Nutrition - 1000	Menu Planning - 1100	1120-Cycle Menus
2	Nutrition - 1000	Menu Planning - 1100	1140-Standardized Recipes
3	Operations - 2000	Food Production - 2100	2130-Culinary Skills
4	Operations - 2000	Serving Food - 2200	2230-Maintaining Food Quality and Appearance
5	Operations - 2000	Serving Food - 2200	2240-Serving Lines

[Edit](#)
[Delete](#)
[Log Training](#)
[Back to List](#)

The following information is shown for the training title:

- **Training Title**
- **Training Length (Hours and Minutes)**
- **Training Format**
- **Training Provider**
- **Additional Information**
- **Created Date** (if available)
- **Training Categories** – combinations of Key Area, Training Topic, and Learning Objective selected

The following actions are available:

- **Edit** – opens the “Edit Training Title” page.

- **Delete** – allows the user to completely delete the training title record.
- **Log Training** – opens the “Log Training” page (see Section 4.2.1) with this training title selected.
- **Back to List** – returns the user to the “Training Title List” page.

NOTE: A user may edit training title records that

- **are not older than the previous school year AND**
- **for which the user has proper authority.**

NOTE: A user may delete training title records that

- **are not older than the previous school year AND**
- **do not have corresponding logged trainings AND**
- **for which the user has proper authority.**

4.2.2.2 Add New Training Title

If the training title that you wish to enter is not present in the system, you may create a new training title. This functionality is available via the “Add New Training Title” button available at the following locations:

- On “Log Training” page below the Training Title field, and
- On top of the “Training Titles List” page.

After pressing the button, you will be taken to the “Create Training Title” page. This page provides fields for entering the Training Title, Training Length (Hours and Minutes), Training Format, Training Provider, Additional Information, and Training Categories. Required fields are denoted by the asterisk (*).

Create Training Title

To add a new training title, enter the new training title details and click Save Training Title button.

* Denotes required field

Training Title *

Training Length * Hours Minutes

Training Format *

Training Provider *

Additional Information

Training Categories *

▶ Nutrition - 1000

▶ Operations - 2000

▶ Administration - 3000

▶ Communications and Marketing - 4000

- **Training Title** – required; enter a descriptive training title.

- **Training Length (Hours and Minutes)** – required; enter a numeric value for Hours and select a value for Minutes from a drop-down.
- **Training Format** – required; select a value from a drop-down.
- **Training Provider** – required; enter the name or the provider organization or person.
- **Additional Information** – enter additional information and/or comments, if any.
- **Training Categories** – required; click and drill in to select one or more values that apply:

- Click on category names to expand and view the available values
- Click on checkbox(es) to select
- Repeat with other categories as needed
- The number of items selected for each parent category will be displayed next to its name.

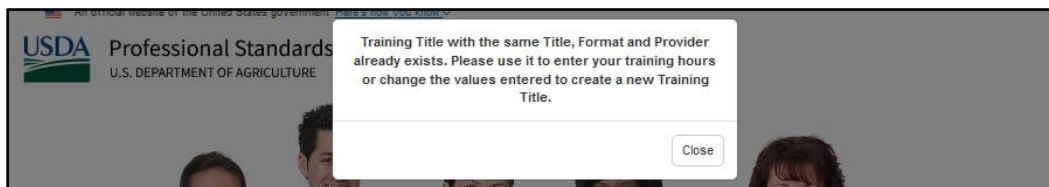
The following actions are available:

- **Save Training Title** – save the data entered to save a new training title record.
- **Cancel** – return to the “Training Title List” page.

After entering all the required information, press the “Save Training Title” button to save a new training title record.

NOTE: Data entered will be checked to make sure a duplicate training title record is not being created. Uniqueness of a training title record is determined by checking the combination of Training Title, Training Provider, and Training Format.

If an existing training title record with the same combination of the Training Title, Training Provider, and Training Type is found, user is notified by an error message:



Press the “Close” button on the dialog to get back to the “Create Training Title” page. Correct data if needed or cancel if you should be using the existing training title.

Once the training title is successfully saved, user is notified by a confirmation dialog:



Press the “Close” button on the confirmation dialog to go to the “Training Title Details” page (see Section 4.2.2.1). Training Title information can be later edited if necessary – see Section 4.2.2.3.

4.2.2.3 Edit Training Title

To edit a specific training title record, press the “Edit” button on the “Training Title Details” page as described in the previous section. The “Update Training Title” page displays the same set of fields as the “Create Training Title” page (see Section 4.2.2.2).

The user can change the following information:

- **Training Title** – required; enter a descriptive training title.
- **Training Length (Hours and Minutes)** – required; enter a numeric value for Hours and select a value for Minutes from a drop-down.
- **Training Format** – required; select a value from a drop-down.
- **Training Provider** – required; enter the name or the provider organization or person.
- **Additional Information** – enter additional information and/or comments, if any.
- **Training Categories** – required; click and drill in to select one or more values that apply:

NOTE: Training Categories can be edited only if there are no trainings logged for this training title.

The following actions are available:

- **Save Training Title** – save the data entered to save a new training title record and return to the “Training Title Details” page.
- **Cancel** – return to the “Training Title Details” page.

NOTE: Data entered will be checked to make sure a duplicate training title record is not being created. Uniqueness of a training title record is determined by checking the combination of Training Title, Training Provider, and Training Format.

If an existing training title record with the same combination of the Training Title, Training Provider, and Training Type is found, user is notified by an error message.

Once the training title is successfully saved, user is notified by a confirmation dialog. Press the “Close” button on the confirmation dialog to go to the “Training Title Details” page (see Section 4.2.2.1).

4.2.2.4 Delete Training Title

The “Delete” button on the “Training Title Details” page allows the user to delete an incorrectly entered training title record. To prevent accidental deletion, a confirmation dialog is displayed.

The screenshot shows a confirmation dialog box with the title "Are you sure you want to delete this Training Title?". The dialog is overlaid on a form with the following visible fields: "Training Format" with the value "Face-to", "Training Provider" with the value "CNP", and a partially visible "Training Title" field. At the bottom right of the dialog, there are two buttons: "Ok" and "Cancel".

4.2.3 View Logged Certifications

The “View Logged Certifications” option under the “Training” menu opens the “View Logged Certifications” page which allows users to search and view their certifications.

The “View Logged Certifications” page displays certifications in a table with the following columns: Certification Name, Employee Name, Completion Date, and Expiration Date.

The certifications displayed in the table are selected using the following controls:

- Completion Date range controls:
 - “From” and “To” date fields
- Expiration Date range controls:
 - “From” and “To” date fields
 - “Next 30 Days” radio button – populates “From” date with today’s date and “To” date with the date 30 days from today’s date
 - “Next 90 Days” radio button – populates “From” date with today’s date and “To” date with the date 90 days from today’s date
 - “Custom Range” radio button – populates “From” date with today’s date and leaves “To” date empty

View Logged Certifications

Select employee(s) and/or dates.

Completion Date From: To:

Expiration Date Next 30 Days Next 90 Days Custom Range

From: To:

Show entries

Certification Name	Employee Name	Completion Date	Expiration Date
ALLERGY AND ANAPHYLAXIS Certificate	Smith, Brandon (143567)	2/26/2023	9/19/2023
CDE NSD COVID 19 UPDATE	Smith, Brandon (143567)	10/4/2021	10/4/2023
ServSafe	Smith, Brandon (143567)	3/7/2023	3/6/2028

Showing 1 to 3 of 3 entries

Users can re-sort the values by clicking on the table headers. Users can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.

Click on the certification names to edit the information.

NOTE: If no certifications are logged, “No employees with Certifications found” message will be displayed, and all controls will be hidden.

View Logged Certifications

Select employee(s) and/or dates.

No employees with Certifications found

4.2.3.1 Add New Certification

A new certification can be added using the “Log Certification” button on your “User Profile” page. After pressing the button, you will be taken to the “Log New Certification” page. This page provides fields for entering the certification details. Required fields are denoted by the asterisk (*).

The following fields are available:

- **Certification Name** – required; enter a descriptive certification name.
- **Completion Date** – required; enter the completion date or select from the calendar control.
- **Expiration Date** – required; enter the expiration date or select from the calendar control.

The Employee selection field allows the user to select their name for the certification.

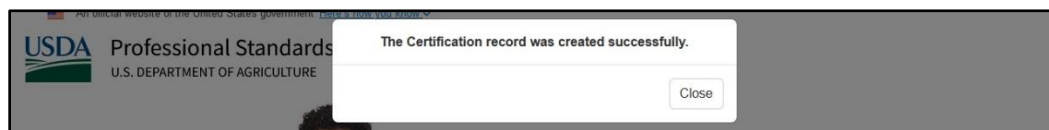
- Employee Name and Employee Number are listed for the employee.

The following actions are available:

- **Log Certification** – save the data entered to save a new certification record.
- **Cancel** – return to the “User Profile” page.

After entering all the required information, press the “Log Certification” button to save the new certification record.

Once the certification is successfully saved, user is notified by a confirmation dialog:



Press the “Close” button on the confirmation dialog to go to the “User Profile” page.

4.2.3.2 View Certification

To view certification details, click on its name on “View Logged Certifications” page. The “Certification Details” page displays containing the following information:

- **Certification Name**

- **Completion Date**
- **Expiration Date**
- **Employees** - Employee Name and Employee Number are listed for the employee

Certification Details

Certification Name ServSafe
 Completion Date 03/07/2023
 Expiration Date 03/06/2028

Employee Name	Employee Number
Smith, Brandon	143567

The following actions are available:

- **Edit Certification** – edit certification data.
- **Delete Certification** – delete certification.

4.2.3.3 Edit Certification

To edit a certification record, press the “Edit Certification” button on “Certification Details” page. The “Edit Certification” page displays the same set of fields as the “Add New Certification” page.

Edit Certification

Update Certification details and click the Update Certification button.
 * Denotes required field

Certification Name * ServSafe
 Completion Date * 03/07/2023
 Expiration Date * 03/06/2028

Select all employees in the table below

Search:

Select	Employee Name	Employee Number
<input checked="" type="checkbox"/>	Smith, Brandon	143567

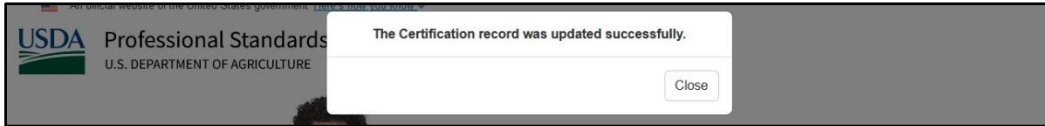
The user can change the following information:

- **Certification Name** – required; enter a descriptive certification name.
- **Completion Date** – required; enter the completion date or select from the calendar control.
- **Expiration Date** – required; enter the expiration date or select from the calendar control.
- **The Employee selection field** – required; check the box by your name.

The following actions are available:

- **Update Certification** – save the data entered to update the certification record.
- **Cancel** – return to the “View Certifications” page.

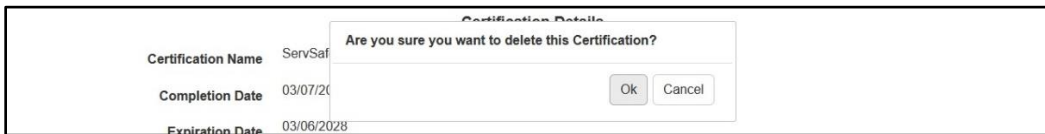
Once the certification is successfully saved, user is notified by a confirmation dialog. Press the “Close” button on the confirmation dialog to go to the “View Certifications” page.



4.2.3.4 Delete a Certification

The “Delete” button on the “Certification Details” page allows the user to delete an incorrectly entered certification record. To prevent accidental deletion, a confirmation dialog is displayed.

Press the “Delete” button. The system will open a confirmation dialog box. Click “Ok” to confirm or “Cancel” to cancel.



After the certification is deleted, the “View Logged Certifications” page is displayed.

4.3 Reports Menu

Selecting the “Reports” button on the top navigation bar will open the “Reports” page.



There are two types of reports currently available to the user: Detailed report and Summary report. Both report types provide information on training logged for employees that match the selected search criteria, with Detailed report allowing for more search criteria to be entered and listing more data fields than the Summary report.

User needs to select the desired Report Type from the drop-down on top of the page:

- Detailed Report
- Summary Report
- Summary Report by a criterion: Summary Report by Key Area, Summary Report by Training Topic, Summary Report by Learning Objective, and Summary Report by Training Title

The user may enter other search criteria and press the “Generate Report” button to generate the report. Press the “Reset Search” button to clear the search criteria.

Detailed Report

This report will provide the detailed information for all logged training, that matches the report criteria selected. Each training record will have its own row in the final report.
Please select at least one Employee name, as a minimum, to run this report.

* Denotes required field

Report Type:

School Year:

Training Title: Please start typing and the USDA Professional Standards Training Database list will auto-populate.

Key Area:

Training Topic:

Learning Objective:

Date Completed:

Training Hours:

Training Minutes:

Show Document Uploaded:

The report results are displayed in a separate browser tab that allows for the report to be printed, exported as a CSV file, exported as an MS Excel file, and exported as a PDF file. See Section 4.3.2 for more information.

4.3.1 Selecting the Report Type

The report type chosen by the user can be determined based on the search criteria the user wants to enter an on the information the user wants to see in the report. Please see the sections below for report descriptions.

4.3.1.1 Detailed Report

The Detailed Report provides the most robust search criteria selection and displays the most fields for the training matches found. This report will display results for all employees with logged trainings.

The Detailed Report allows the user to enter the following search criteria:

- School Year
- Job Title
- Training Title
- Key Area
- Training Topic
- Learning Objective
- Training Hours/Minutes
- Document Uploaded (whether to list the document names)

The Detailed Report returns the following information for each training record that matches the search criteria:

- Employee Name and Employee Number (if provided)
- Job Title
- Hiring Date
- Training Title
- Key Area
- Training Topic
- Learning Objective
- Training Hours
- School Year
- Document Uploaded (if this option is selected)

4.3.1.2 Summary Report

The Summary Report provides the abbreviated search criteria selection and displays fewer fields for the training matches found. This report will display results for all employees (with or without logged trainings).

The Summary Report allows the user to enter the following search criteria:

- School Year
- Job Title
- Training Hours/Minutes

The Summary Report returns the following information for each training record that matches the search criteria:

- Employee Name and Employee Number (if provided)
- Job Title
- Location
- Hiring Date
- Required Training Hours
- Completed Training Hours
- School Year

4.3.1.3 Summary Reports by a Criterion

The Summary Reports by Key Area, Training Topic, Learning Objective, and Training Title are similar to the Summary Report, but allow one additional search criteria to be entered (that matches the report title). These four reports will display results for all employees with logged trainings.

Key Area, Training Topic, Learning Objective need to be selected by the user from a drop-down.

Training Title needs to be entered using the Training Title field (same as on the “Log Training” page, see Section 4.2.1 for more information).

These Summary Reports allow the user to enter the following search criteria:

- School Year
- Job Title
- Key Area or Training Topic or Learning Objective or Training Title
- Training Hours/Minutes

These Summary Reports return the same following information for each training record that matches the search criteria:

- Employee Name and Employee Number (if provided)
- Job Title
- Hiring Date
- Completed Training Hours
- School Year

4.3.2 Viewing Report Output

Report output is displayed in a separate browser tab with the Report Type listed on top. For Summary Reports by a Criterion the selected criterion value is displayed under the report type in parenthesis.

Report results are displayed in a table initially sorted by Employee Name. The information can be re-sorted by clicking on table column headings. The total number of records found is displayed below the table. Employee and Staff users will only see their own trainings in the reports output.

Summary Report						
Close Report	Print Report	Export CSV	Export Excel	Export PDF		
Employee Name	Job Title	Hiring Date	Required Training Hours	Completed Training Hours	School Year	
Test, a	School Food Authority - District Director	1/31/2021	06:00	01:00	2020-2021	

Showing 1 to 1 of 1 entries

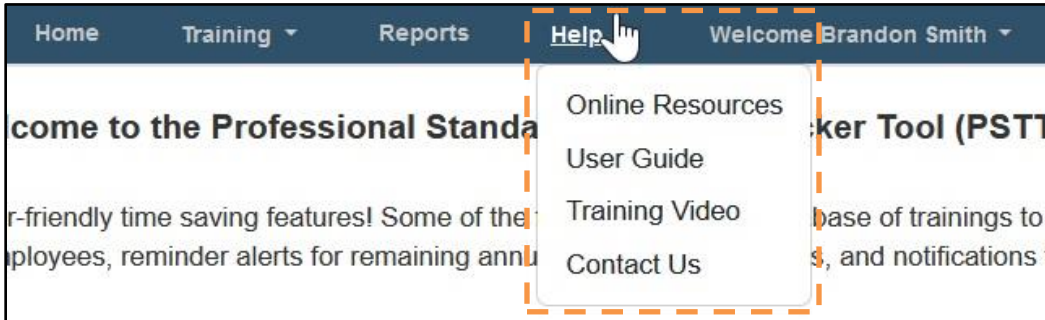
The following actions are available from the “Report Results” page:

- Close Report – closes report browser tab
- Print Report – brings up the system Print dialog
- Export CSV – generates a delimited file of report results; the file will open in MS Excel or other software installed on user’s computer based on its local settings.

- Export Excel – generates a MS Excel spreadsheet of report results; the file will open in MS Excel.
- Export PDF – generates a PDF file of report results.

Close the browser tab to close the report results.

4.4 Help Menu



The “Help” dropdown menu has the following options:

- **Online Resources** - This page holds links to other sites which may be of interest.
- **User Guide** - Provides a PDF of the current User Guide with step-by-step instructions on how to utilize the tool,
- **Training Video** - Provides training videos with chapters and subchapters demonstrating how to utilize the tool, and
- **Contact Us** - Provides the generation of an email for additional assistance.

4.4.1 Online Resources

The “Online Resources” menu item opens a page for resources on Professional Standards.

This page displays Overview links and Resources links:



Overview

- USDA Professional Standards Web site (<https://www.fns.usda.gov/cn/professional-standards>)
- Final Rule Summary (https://www.fns.usda.gov/sites/default/files/cn/profstandards_flyer.pdf)
- Learning Objectives (https://www.fns.usda.gov/sites/default/files/cn/ps_learningobjectives.pdf)
- Training Topics (https://www.fns.usda.gov/sites/default/files/cn/ps_trainingtopics.pdf)
- Frequently Asked Questions (Memo SP05-2020) (<https://www.fns.usda.gov/cn/questions-answers-regarding-professional-standards-state-and-local-school-nutrition>)

Resources

- Professional Standards- Find A Training (<https://professionalstandards.fns.usda.gov/>)
- Guide to Professional Standards for School Nutrition Programs (<https://www.fns.usda.gov/tn/guide-professional-standards-school-nutrition-programs>)
- Team Nutrition (<https://www.fns.usda.gov/tn/team-nutrition>)
- Professional Standards: Resources (<https://www.fns.usda.gov/tn/professional-standards-resources>)
- Professional Standards Training Reward Badges (<https://www.fns.usda.gov/tn/professional-standards-training-reward-badges>)

The links on this page all have pop-up messages letting the user know they are leaving our site. The pop-up message is as follows:

“The links on this page will connect to FNS resources that are outside of the Professional Standards Training Tracker Tool.”

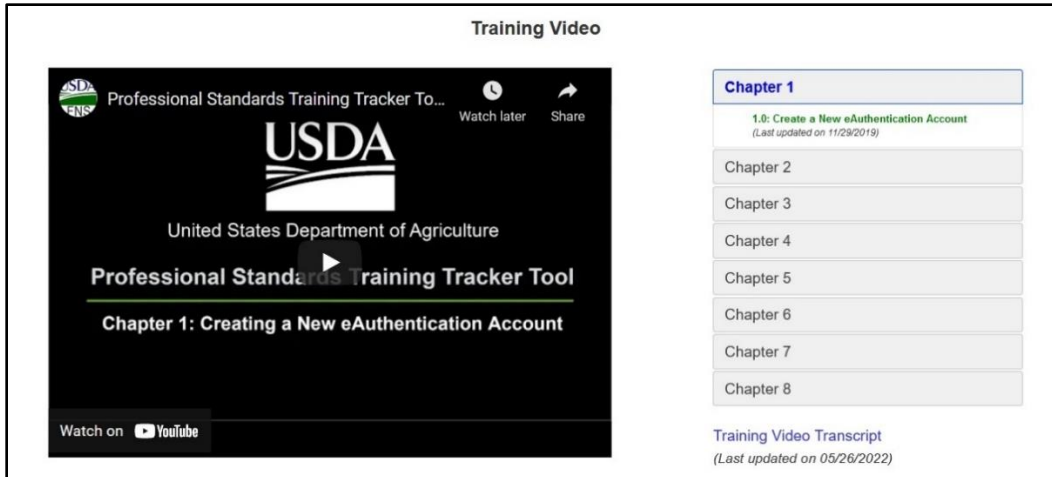
Each internet browser adds their own formatting around pop-up messages; however, the function will be consistent. If you click the “OK” button, the destination page will open in a new tab. If you click the “Cancel” button, you will remain on the “Online Resources” page.

4.4.2 User Guide

The “User Guide” menu item opens the PSTTT user guide for the appropriate user role in PDF format.

4.4.3 Training Video

The training video page provides access to PSTTT training videos. These videos will play embedded in the screen or maximized and are closed captioned. There are multiple videos which cover broad topics for our system. All published videos appear on this page. The first two videos are also available via links on the Tool’s “About” page.



The cumulative transcript for the videos in PDF format is linked from the Training Video page.

4.4.3.1 The Current Video Catalogue

- Chapter 1: Create a New eAuthentication Account
- Chapter 2: Login for the First Time
 - Chapter 2.1: Start Your Profile
 - Chapter 2.2: Create a School Employee User Profile
 - Chapter 2.3: Create a School Manager User Profile
 - Chapter 2.4: Create a School Director User Profile
 - Chapter 2.5: Create a User Profile for a State User
 - Chapter 2.6: Create a User Profile for a USDA User
 - Chapter 2.7: Once You Are Logged In
- Chapter 3: Navigation, Help, and the Dashboard page
 - Chapter 3.1: Navigation Overview
 - Chapter 3.2: Help Menu
 - Chapter 3.3: Manager and Director Menu Options
 - Chapter 3.4: PSTTT Dashboard
- Chapter 4: Adding, Editing, and Deleting Training Records and Training Titles
 - Chapter 4.1: Your Training Status
 - Chapter 4.2: Viewing Training Record Details
 - Chapter 4.3: Browsing Available Training Titles
 - Chapter 4.4: Adding a Training Record
 - Chapter 4.5: Managing a Training Record
 - Chapter 4.6: Adding a Training Title
 - Chapter 4.7: Managing a Training Title
- Chapter 5: Reports
- Chapter 6: Manager and Director - Employees Functionality
 - Chapter 6.1: View Employee List
 - Chapter 6.2: Search Employees
 - Chapter 6.3: User Profile Page for an Employee

- Chapter 6.4: Print Certificates
- Chapter 6.5: Create User Profile
- Chapter 6.6: Upload Bulk Employee Profiles
- Chapter 6.7: Deactivate Employees
- Chapter 7: Manager and Director - Additional Functionality
 - Chapter 7.1: Log Training
 - Chapter 7.2: View Logged Trainings
 - Chapter 7.3: Upload Bulk Training Records
 - Chapter 7.4: Managing Training Titles
 - Chapter 7.5: Upload Bulk Training Titles
 - Chapter 7.6: Additional Reports Functionality
 - Chapter 7.7: Additional Help Menu Functionality
- Chapter 8: School Manager and Director Functionality
 - Chapter 8.1: Employee Selection Options
 - Chapter 8.2: Manage Schools
 - Chapter 8.3: Generate School List
 - Chapter 8.4: Manage School Districts
 - Chapter 8.5: Training Director (Multiple School Districts) Functionality

4.4.3.2 Training Video Controls

The PSTTT “Training Video” page allows user to review all available training videos. There are multiple videos which cover broad topics for our system. All published videos appear on this page. The first two videos are also available via links on the Tool’s “About” page.

Each video has a chapter number and a title. The chapters that have a number that ends in a zero (e.g. 3.0 or 4.0) are considered ‘main’ chapters. If a chapter number is displayed as a decimal (e.g. 3.1 or 4.3), then they are considered sub-chapters.

Clicking on the main chapter link will play all sub-chapters, and any other content as a single video. These videos might take a long time to finish. It is possible to only watch a portion of the video by either clicking on a sub-chapter link, or by jumping to the sub-chapter section using the built-in video controls.

To access the video controls, use your mouse to hover over a video. The controls will appear at the bottom of the video screen. The most helpful controls are:

- “Play/Pause” button
- Volume Control
- Video Time Display/Bar
- Closed Captioning toggle
- Settings
- Full/Reduced Screen

In the center you will see the video time bar. Your current point in the video will show up starting from the left as a bright colored line progressing to the right (towards end of

video). If you click and drag on the end of this, or click somewhere else in the timeline, the video will jump to that point.

Your computer's video player software will also affect viewing videos. For video quality issues, it is recommended to adjust the “Quality” setting to 1080p HD. If there are any problems that are not fixed with the displayed controls, please request your computer’s technical support team to help you.

4.4.4 Contact Us

The “Contact Us” form page displays data entry fields for the user to allow them to submit a request for assistance. The asterisks following the field names, indicate that the field is a required field. The “User Name” and “Email” from the logged in user are populated by default but may be changed by the user.

This form provides the following fields. Required fields are denoted by the asterisk (*).

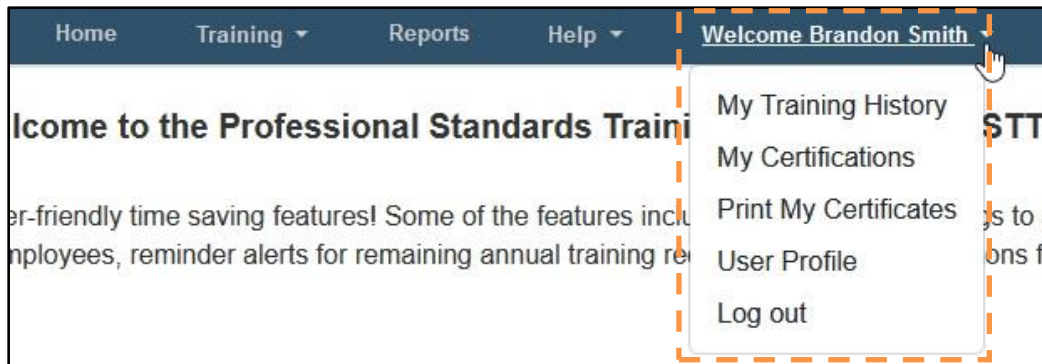
- **Title** - required; the preferred title of address for correspondence.
- **Name** - required; he name that should be used. By default, this value shows the logged in user.
- **Email Address** - required; he email address that should be used for correspondence. By default, this value shows the logged in user.
- **Phone Number** - the user may choose to provide this method of correspondence.
- **Message** - required; the details of the problem, observation, or suggestion. This is the statement upon which the user would like assistance.
- **Accessibility or Section 508-related Inquiry** - a checkbox field. If this is an accessibility assistance request, please check this box.

The following actions are available:

- **Send Message** – submit the assistance request.
- **Cancel** – cancel the assistance request and return the user to the “Home” (“Dashboard”) page of the tool.

4.5 Welcome User

The two links in the “Welcome...” dropdown menu will take the user to their “User Profile” page or log them out of the site.



The “Welcome User” dropdown menu has the following options:

- **My Training History** – View your training history,
- **My Certifications** – View your certifications,
- **Print My Certificates** – Print your training certificates,
- **User Profile** – View and edit your user profile information, and
- **Log out** – Log out of the PSTTT web application.

4.5.1 My Training History

The “My Training History” option under the “Welcome User” menu opens the “My Training History” page which provides a quick view of the user’s training by school year.

The User’s “My Training History” page provides a selectable school year option, and a course information area showing a hyperlinked Training Title, Completion Date, and Training Hours for each course taken for the selected program year.

You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.

Use the Search field to narrow down the selection by typing in one or more keywords of the training title. The entries in the table will be updated as you type.

Clicking the hyperlink for a course will navigate the user to the “Training Details” page for that training.

My Training History

FNS Manager, 0.00 hours are required for 2021-2022 school year

Show 10 entries Search:

Training Title	Completion Date	Training Length
#GCS2022 NO TIME TO TRAIN-FIVE STEPS FOR FOOD-SAFE TASTE TESTING	03/11/2022	00:15
07/28/21 LOCAL - REIMBURSABLE MEALS	01/25/2022	00:30
Total Hours:		00:45

Showing 1 to 2 of 2 entries

[View Profile](#)

The following actions are available:

- **View Profile** – view your “User Profile” page.
- **Click on each training title** to view training details.

4.5.2 My Certifications

The “My Certifications” option under the “Welcome User” menu opens the “My Certifications” page which provides a quick view of the user’s certifications.

The user’s “My Certifications” page displays certification information in a table with the following columns: Certification Name, Completion Date, Expiration Date.

My Certifications

Show 10 entries

Certification Name	Completion Date	Expiration Date
ALLERGY AND ANAPHYLAXIS Certificate	2/26/2023	9/19/2023
CDE NSD COVID 19 UPDATE	10/4/2021	10/4/2023
ServSafe	3/7/2023	3/6/2028

Showing 1 to 3 of 3 entries

[View Profile](#)

You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.

Clicking the hyperlink for a certification will navigate the user to the “Certification Details” page for that certification (see Section 4.2.3.2).

4.5.3 Print My Certificates

The “Print My Certificates” option under the “Welcome User” menu opens the “Print My Certificates” page which provides a quick view of the user’s training by school year.

The User’s “Print My Certificates” page lists information for every school year the user was active in a table, a row per school year. Required hours and Completed hours are listed for

each school year, as well as the Key Area badges earned, School years for which the user has completed their training requirements, has a checkbox in the Select column of the table. Check one or more the checkbox and press the Print Certificates button to print the certificates. Please see Section 3.3 “Training Certificate” of this manual for more information.

Print My Certificates

Please click on for helpful tips.

Select all certificates.

Select	School Year	Badges	Required	Completed
Not Available	2018-2019		6:00	0:00
<input type="checkbox"/>	2019-2020		12:00	0:30
Not Available	2020-2021		12:00	8:30

Print/Save Certificate

4.5.4 User Profile

The “User Profile” page displays user profile information. Manager’s information is displayed if available. For users with the School User Category, District information will be displayed, and School information will be displayed if entered.

User Profile

User Information	
First Name	Brandon
Last Name	Smith
Employee Number	143567
Hiring Date	05/10/2018
Business or Work Email	sm04@yahoo.com
Category	SCHOOL
Role	EMPLOYEE
Job Title	School Food Authority - All Other Staff (20 or more hours/week)
State	ALABAMA
District	ABC DISTRICT (AUTAUGA COUNTY)

School Information					
School Name	School Type	District Name	City	State	Zip
BLUE ROCK MIDDLE SCHOOL	Regular School	ABC DISTRICT	SILVER SPRING	AL	11111

Edit
View Training History
View Certifications
Log Certification

From the “User Profile” page, the following actions are available:

- **Edit** – edit your user profile information,
- **View Training History** – view your logged trainings (see Section 4.5.1),
- **View Certifications** – view your logged certifications (see Section 4.2.3),
- **Log Certification** – log a new Certification (see Section 4.2.3.1).

4.5.5 Edit User Profile

The “Edit” button on the “User Profile” page will open the “Edit User Profile” page and allow the user to make selected changes to their own profile.

The functionality of the “Edit User Profile” page is the same as the “Create User Profile” page that is described in Section 2.4. The fields displayed on Edit User Profile are the same as the fields on the “Create User Profile” page with the following differences in field population/content:

- **First Name** – required, read-only; pre-populated from the eAuthentication system.
- **Last Name** – required, read-only; pre-populated from the eAuthentication system.
- **Employee Number** – optional; employee ID or number in your system.
- **Hiring Date** – required; enter your date of hire for your current position.

NOTE: Hiring Date is validated to make sure it is before the Completion Date for any trainings logged for the employee.

- **Business or Work Email** – required, read-only; pre-populated from the eAuthentication system.
- **User Category** – required, read-only; populated with your User Category.
- **Role** – required; select the most appropriate value from the list of values based on User Category you selected.
- **Job Title** – required; select the most appropriate value from the list of values based on User Category and Role you selected.
- **State** – required, read-only; populated with your State.
- **School District** (for SCHOOL User Category only) – required, read-only; populated with your School District.

NOTE: If your School District is not in the list or has changed, Director users can add a new school district or make edits to the current district (Refer to Section 2.5 for instructions). Manager and Employee-users can send requests to add a new district to cnpntab@usda.gov.

- **School** (for SCHOOL User Category only) – required for Manager (multiple selection) and Employee (single selection) roles; select the most appropriate value from the list of values based on the School District you selected. School name is followed by its zip code in parenthesis. Type the first letter of the school district name into this field to have it jump to the closest match, then continue selection from the drop-down.
- **“Selected Schools” button** (for SCHOOL User Category only) – not available for Director Role; click this button to view your school(s) that are currently saved for the user.

- **“Add New School” button** (for SCHOOL User Category only) – not available for Director Role; click this button to add a new school. For more information see Section 2.6.
- **Organization Assignment Date** – The “Organization Assignment Date” defaults to today’s date and is enabled when employee’s Organization (State, District, School combination) is changed. For example, when editing your school, you can set the “Organization Assignment Date” to the date when your transfer from one school to another occurred. The value of the “Organization Assignment Date” has to fall within the employee’s last activity period and be after the last organization assignment date.
- **Manager** – not available for Director Role; select the most appropriate value from the list of values.

The following actions are available:

- **Update** – save the changes and return to the “User Profile” page.
- **Cancel** – cancel all changes and return to the “User Profile” page.

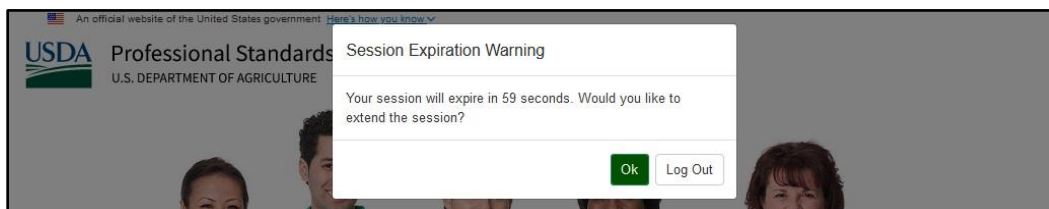
4.5.6 Log Out

Selecting the Log out option will log the user out of PSTTT. For security purposes, the eAuthentication tool will attempt to close the browser window. For IE users, the browser window will close, but other browsers will continue to display the eAuthentication tool log out page.

4.5.6.1 Session Time-Out

User sessions in PSTTT will time out in 20 minutes due to user inactivity. A Session Expiration Warning dialog will be displayed with two buttons:

- **OK** – extend your session and continue using PSTTT.
- **Log Out** – log out of PSTTT.



If the user does not respond to the session expiration warning, the PSTTT will automatically log them out after 20 minutes.

5 Manager and Director-Specific Functions

There are many functions available to Employees that have been enhanced for use by Managers and Directors. There are also functions reserved for Managers and Directors. This section of the manual details those functions.

5.1 Changes to the Standard Functions – Email Reminders

PSTTT sends out automatic email reminders for users to complete their required training hours twice a year, on April 1st and October 1st. In addition to the personal emails, Managers and Directors will receive a summary status email when one or more of their employees has not completed their required training hours. Employees who have no required training hours assigned based on their Job Title or have completed their required training hours are not included in Manager/Director emails' employee table.

The emails are titled “Status of Required Professional Standards Training Hours for the School Year” and have the following format:

Hello Test, v,					
You are a registered user of the USDA Professional Standards Training Tracker Tool (PSTTT).					
Below is a list of employees under your jurisdiction that have 54 days remaining to complete their required training hours for the 2020-2021 school year:					
Employee Name	Required Training Hours	Completed Hours	Role	Job Title	Can Login to the Tool
Chavez, Janet	10:00	00:00	MANAGER	School Food Authority - Manager	No
Herrada, Maria	10:00	09:00	MANAGER	School Food Authority - Manager	No
Martinez, Cecilia	06:00	05:00	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	No
Santana, Virginia	06:00	05:00	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	No
Thompson, Brenda	06:00	05:00	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	No
This is an autogenerated message. Please do not reply to this email.					
Regards, Professional Standards Training Tracker Tool USDA, Food and Nutrition Service					

The email will be sent from the donotreply@usda.gov email address. Please do not reply to this email.

5.2 Changes to the Standard Functions – Trainings

The “Training” menu for Managers and Directors has three extra options:

- “View Logged Trainings” allows managers to view the list of training classes that have been created for any employee

- “Upload Bulk Training Records” allows Managers and Directors to bulk upload training records for their employees
- “Generate Training Titles List” produces a list of all training titles in Excel file format.



5.2.1 View Logged Trainings

The “View Logged Trainings” option under the “Training” menu is available to Managers and Directors only. It opens the “View Logged Trainings” page which allows managers to view the list of training classes that have been created for any employee.

This page lists the Training Title, Employee Name(s), Training Length, and Completion Date for the employees visible to the user logged in (based on their permissions) that were active during the School Year selected in the drop-down and are currently active.

View Logged Trainings

School Year 2017-2018

Show 10 entries Search:

Training Title	Employee Name	Training Length	Completion Date
CREDITING THE FOOD COMPONENTS IN SCHOOL NUTRITION PROGRAMS: GIVING CREDIT WHERE CREDIT IS DUE!	Heetbkwair, Kauewsask	01:00	09/13/2017
FRESH FRUIT AND VEGETABLE PROGRAM TRAINING	Jamjd, Ebolu	01:00	03/11/2018
POWER UP!	Jamjd, Ebolu	00:30	03/11/2018

Showing 1 to 3 of 3 entries

NOTE: Only employees who were active during the School Year selected are listed for each training on View Logged Trainings page.

You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.

Use the Search field to narrow down the selection by typing in one or more characters (letters or numbers) of the training title. The entries in the table will be updated as you type.

Clicking on the Training Title for a training record shown on the “View Logged Training” page will take the manager to the “Training Details” page for that training record. For more information, please see Section 4.2.1.1.

5.2.2 Log Training

The “Log Training” functionality for Managers and Directors is as described in Section 4.2.1, and they can select multiple participants for each training session.

The Employee selection field allows the user to select one or more names (including their own), via checkboxes, for the training to be documented.

- The field is populated with the list of employees based on the user’s access level, with the user’s own name on top.
- Employee Name and Role are listed for each employee, and for the School User Category employee’s schools are listed as well.
- This is a required field, so at least one checkbox must be selected.

The employees listed in the Employee selection field are selected based on the School Year selected for the training. If you select some employees and then change the School Year value, the list of employees will be updated, and your selections will be cleared out.

To make Employee selection process easier, School Manager and Director users can select one or more schools using the “Filter Employees By Schools” control to filter the employees shown in this area.

Use the “Hide Current Inactive Employees in the table below” checkbox to limit the employees displayed to those who are currently active.

Use the “Search” field to narrow down the selection by typing in one or more keywords of the employee name and/or employee number. The entries in the table will be updated as you type.

Re-sort the values by clicking on the table headers.

To add this training to your training history page or your employee's training history page, please choose the names outlined below and click the Record Training button.

Note: Please use the CTRL key when selecting or deselecting schools, to keep multiple selections.

Filter Employees By Schools

All Employees
 BLUE ROCK MIDDLE SCHOOL
 ROCK CREEK HIGH SCHOOL
 ROSE GARDEN MIDDLE

Hide Current Inactive employees in the table below

Select all employees in the table below

Search:

Select	Employee Name	Employee Number	School Name	Role
<input type="checkbox"/>	Smith, Brandon	143567		DIRECTOR
<input type="checkbox"/>	Alder, Mary	12345	BLUE ROCK MIDDLE SCHOOL	EMPLOYEE
<input type="checkbox"/>	Bratski, William	12347	BLUE ROCK MIDDLE SCHOOL	EMPLOYEE
<input type="checkbox"/>	Bright, Alma	12111		DIRECTOR
<input type="checkbox"/>	Brown, Marni	12349	SILVER SPRING ELEMENTARY SCHOOL	EMPLOYEE
<input type="checkbox"/>	Carter, Marina	123488	THE BEST SCHOOL	EMPLOYEE
<input type="checkbox"/>	DONALD, CRAFTER		THE BEST SCHOOL	EMPLOYEE
<input type="checkbox"/>	Greyes, Simon		THE BEST SCHOOL	EMPLOYEE
<input type="checkbox"/>	Horn, Rachel		SILVER SPRING ELEMENTARY SCHOOL	EMPLOYEE
<input type="checkbox"/>	LOPEZ, DANIEL			DIRECTOR
<input type="checkbox"/>	Meyer, Linda	12435	ROCK CREEK HIGH SCHOOL, BLUE ROCK MIDDLE SCHOOL	MANAGER

After entering all the required information, press the “Log Training” button to save a new training record.

NOTE: Data entered will be validated for each employee selected to make sure no duplicate training records are being created. Uniqueness of a training record is determined by checking the combination of Employee, Training Title, Completion Date, and School Year.

NOTE: Data entered will be validated for each employee selected to make sure that training’s Completion Date is during a period when employee’s PSTTT account was active.

5.2.3 Training Details

The “Training Details” page provides a view of all the details for the training.

NOTE: A user may edit, upload documents for, or delete training records for which the user has proper authority over all the training attendees.

Any employees no longer valid for the training will be listed in the “Invalid Employees” section.

If you have proper authority over all training attendees, “Edit Training” button will be available allowing you to edit the training record. In addition to that, if all employees

selected for the training were active during the selected School Year, the “Delete” button will be available allowing you to delete the training record.

An employee can become invalid for an existing training if they were deactivated with a Deactivation Date that is before the School Year selected for the training (see Section 5.5.10).

5.2.3.1 Training Details Page – Back to List Button

The behavior of the “Back to List” button on the “Training Details” page for Managers and Directors depends on how you reached the “Training Details” page:

Coming From:	Back to List Takes you to:
Clicking on a Training Title on YOUR “Training History” page	YOUR “Training History” page
Creating or Editing a training with you as the only employee selected	YOUR “Training History” page
Creating or Editing a training with you and other employees selected	YOUR “Training History” page
Creating or Editing a training with other employees only	“View Logged Trainings” page (correct school year selected)
Clicking on a Training on the “View Logged Trainings” page	“View Logged Trainings” page (correct school year selected)
Clicking on a Training on an employee’s “Training History” page	Employee’s “Training History” page

5.2.3.2 Delete an Existing Training Record

You can delete it and all associated information using the “Delete” button on “Training Details” page. For more information see Section 4.2.1.4.

Use this functionality if:

- The incorrect training title was selected for a class.
- All training records should be removed for all indicated training attendees.

5.2.3.3 Log Certification

You can log a certification for one or more employees using the “Log Certification” button on “Training Details” page. The “Log Certification” button opens the “Add New Certification” page (see Section 4.2.3.1).

The “Certification Name” field will be editable and pre-populated with the Training Title.

NOTE: You will be able to log multiple certifications for the same Training, so make sure that each employee is only selected once.

5.2.4 Edit Training

To edit a specific training record, press the “Edit Training” button on the “Training Details” page. The “Update Training” page for Managers and Directors functions the same as described for Employees in Section 4.2.1.2.

The “Employees” control will list all employees that were active in the School Year selected. Employees that were assigned to the training will have their checkboxes checked.

If you change the School Year value, the list of employees available for this training will change and “Employees” control will be updated accordingly. Employees who were assigned to the training but are invalid for the School Year selected will be listed in the “Invalid Employees” section, preventing you from saving the training record.

Select all employees in the table below

Search:

Select	Employee Name	Employee Number	School Name	Role
<input checked="" type="checkbox"/>	Alder, Mary	12345	BLUE ROCK MIDDLE SCHOOL	EMPLOYEE
<input checked="" type="checkbox"/>	Bratski, William	12347	BLUE ROCK MIDDLE SCHOOL	EMPLOYEE
<input checked="" type="checkbox"/>	Brown, Marni	12349	SILVER SPRING ELEMENTARY SCHOOL	EMPLOYEE
<input checked="" type="checkbox"/>	Meyer, Linda	12435	BLUE ROCK MIDDLE SCHOOL, ROCK CREEK HIGH SCHOOL	MANAGER

The following employees are not valid for the selected School Year.

Invalid Employees

Status	Employee Name	Employee Number	Role
Invalid	Smith, Brandon	143567	DIRECTOR

5.2.4.1 Add Employees to an Existing Training Record

To add employees to an existing training record, use the “Edit” button on the “Training Details” page to edit the training. On the “Update Training” page check the checkboxes for any additional employees and save as described in Section 4.2.1.2.

5.2.4.2 Remove Employees from an Existing Training Record

To remove employees from an existing training record, use the “Edit” button on the “Training Details” page to edit the training. On the “Update Training” page uncheck the checkboxes for any additional employees and save as described in Section 4.2.1.2.

Use this functionality if:

- The training class was correctly recorded.
- The employee list logged for the training has one or more incorrect employees listed.
- The training should only be removed for some (not all) of the training attendees.

5.2.5 Bulk Import of Trainings

Managers and Directors have the ability to perform a bulk upload of trainings for their employees using the “Upload Bulk Training Records” sub-menu under the Training menu. The “Upload Bulk Training Records” sub-menu takes you to the “Upload Bulk Training Records” page.

Click on the “template” link, shown in blue, and save the template file to your computer. The template contains the following columns:

- **Training Title ID** – required; enter the training title ID(s) for the training(s) being logged. Please refer to the Generate Training Title List (available under Training menu) to add the requested training title information to the template.
- **Learning Objectives (comma-separated)** – required; enter numeric values for Learning Objectives, separated by commas.
- **Completion Date** – required; enter the date the training was completed.
- **School Year** – required; enter a school year (e.g. 2021-2022).
- **Comments** – enter additional information and/or comments, if any, for the training(s) being logged.
- **PSTTT Employee IDs (comma-separated)**– required; enter the PSTTT employee IDs of the employees who completed the training(s), separated by commas. Please refer to the “View Employee List” page (available under the Employees menu) to Generate Employee List to add the requested employee information to the template.

The file also contains a sample row. Use this row as an example, then delete it from the spreadsheet.

Please make sure to include all of the required information (marked with *). Delete the example row (marked in red) prior to uploading.					
Training Title ID*	Learning Objectives* (separated by commas)	Completion Date*	School Year*	Comments	PSTTT Employee IDs* (comma-separated)
123	1170, 1210, 1230, 1310	3/5/2021	2020-2021	This is a very interesting training.	1234, 1235, 1238

Fill out and save the spreadsheet to your computer. Click “Browse” to locate the spreadsheet you just saved, then use the “Upload File” button on “Upload Bulk Training Records” page to upload the file.

Upload Bulk Training Records

» Upload Bulk Training Records Instructions

Add multiple training records by uploading a Microsoft Excel file based on the provided [template](#). Please note that files with more than 100 training records may take a long time to upload. For faster results, it is recommended to upload in batches of 100.
Make sure to enter in all required fields (*), remove the example row, and save and close the template file prior to uploading.

No file selected.

The “Review Uploaded Training Records” page is displayed once the file is uploaded. The page displays a block of data entry controls for each training record imported from the MS Excel file.

The data entry fields are:

- Training Title, Training Provider, Training Format, Training Length (Hours and Minutes) – derived from the Training Title ID,
- Completion Date,
- School Year,
- Comments,
- Training Categories, and
- Selected Employees – derived from the PSTTT Employee IDs in the file uploaded.

Required fields are denoted by the asterisk (*).

Review Uploaded Training Records

Please review the uploaded values. Required fields are marked with an asterisk (*). Records with validation errors are marked in red.

Training Title A GUIDE TO TASTE TESTING LOCAL FOODS IN SCHOOLS	Training Provider VERMONT FEED.		
Training Format Print Materials/Training Materials	Training Length 0 Hour(s) 30 Minutes	Completion Date * 07/31/2021	School Year * 2020-2021

Comments
This is a mandatory training

Training Categories *

- Nutrition - 1000 / Menu Planning - 1100 / 1130-Local Foods - Farm to School
- Nutrition - 1000 / Nutrition Education - 1200 / 1220-Classroom and Cafeteria Integration
- Nutrition - 1000 / Nutrition Education - 1200 / 1230-School Gardens
- Operations - 2000 / Food Production - 2100 / 2130-Culinary Skills
- Administration - 3000 / Program Management - 3200 / 3230-Healthy School Environment
- Communications and Marketing - 4000 / Communications and Marketing - 4100 / 4120-Program Promotion

Selected Employees *

- Meyer, Linda (12435) - MANAGER

Additional Eligible Employees

The “Show List” button in the “Selected Employees” section expands the list of employees available for the School Year and Completion Date selected. If you change the School Year or Completion Date value, the list of employees available for this training will change.

Blocks for training records that were flagged by the import data validation as having errors, will be displayed in red. Error messages will be displayed for each field that has invalid or missing values in it.

Edit the fields to correct the errors, and as you do so, the error messages will disappear.

The “Selected Employees” control may have up to three sections, as applicable. The “Invalid Employees” section lists employee IDs imported from your spreadsheet that are not valid for the School Year and/or Completion Date selected. “Selected Employees” section displays employees, whose IDs were successfully imported from your spreadsheet; you can uncheck them if necessary. “Additional Eligible Employees” section lists additional employees who were valid for the School Year and Completion Date selected; you can select them if necessary.

Use the “Remove Invalid Selection(s)” buttons in the “Training Categories” and “Invalid Employees” sections to remove invalid selections, if any. Once there are no validation errors detected for a particular training title, the block will become blue.

You can also delete any training record block by pressing the “Remove Training Record” button.

A confirmation dialog will be displayed. Once removed, this action cannot be undone.

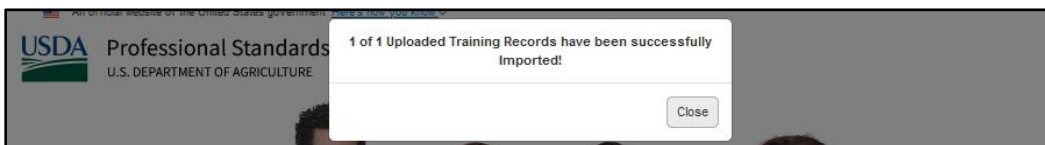


Once you are done correcting and modifying the training records data, use the “Import Training Records” button to save the training records.



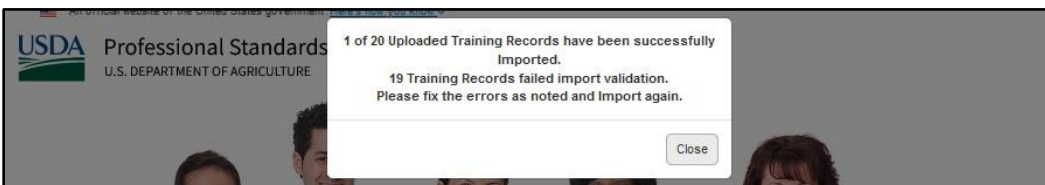
NOTE: Data entered will be checked to make sure no duplicate training records are being created. Uniqueness of a training record is determined by checking the combination of Employee, Training Title, Completion Date, and School Year.

If all training records are saved without errors, a confirmation dialog will be displayed, and you will be taken to the “View Logged Trainings” page after pressing the “Close” button.



If all or some training records caused further errors while being saved, an error message will be displayed in the dialog.

NOTE: The training records that did not have any errors will be saved at this point and will be accessible through the PSTTT screens.



Any records with errors will be listed on “Review Uploaded Training Records” page with the appropriate error messages.

The following users have a training already recorded for this Training Title, Completion Date and School Year and cannot be saved: Tovic, Mina
Please check the information you entered and try again.

Remove Training Record

Training Title
A GUIDE TO TASTE TESTING LOCAL FOODS IN SCHOOLS

Training Provider
VERMONT FEED.

Training Format
Print Materials/Training Materials

Training Length
0 Hour(s) 30 Minutes

Completion Date *
07/31/2021

School Year *
2020-2021

Comments
duplicate row for a training that does not already exist (one of the rows above) and same employees

Training Categories *

- Nutrition - 1000 / Menu Planning - 1100 / 1130-Local Foods - Farm to School
- Nutrition - 1000 / Nutrition Education - 1200 / 1220-Classroom and Cafeteria Integration
- Nutrition - 1000 / Nutrition Education - 1200 / 1230-School Gardens
- Operations - 2000 / Food Production - 2100 / 2130-Culinary Skills
- Administration - 3000 / Program Management - 3200 / 3230-Healthy School Environment
- Communications and Marketing - 4000 / Communications and Marketing - 4100 / 4120-Program Promotion

Selected Employees *

- Tovic, Mina - EMPLOYEE

Additional Eligible Employees

You can edit the data for training records with errors or use the “Remove Training Record” button for each training record block. Once you are done correcting and modifying the data, use the “Import Training Records” button again to save.

Review Uploaded Training Records

Please review the uploaded values. Required fields are marked with an asterisk (*).Records with validation errors are marked in red.

Import Training Records

Remove Training Record

You can also cancel the process of importing the training records at any point by pressing the “Cancel” button on “Review Uploaded Training Records” page. If some of the training records were already saved, they will remain in the system, but the records still displayed on “Review Uploaded Training Records” page will not be saved.

A confirmation dialog will be displayed since this action cannot be undone.

Please review the uploaded values. Required fields are marked with an asterisk (*).Records with validation errors are marked in red.

This page is asking you to confirm that you want to leave — information you've entered may not be saved.

Import Training Records

Remove Training Record

Press “Leave page” button to cancel, or press “Stay on page” button to stay on page and continue editing data in the training title blocks. If you cancel, you will be taken to the “Upload Bulk Training Records” page.

Once import process is complete, a success dialog is displayed, and the user is taken to the “View Logged Trainings” page.

5.2.6 Training Title List - Managing Training Titles

- School Directors can manage all training titles created by employees in their school district.
- State Directors can manage all training titles created by employees in their state.
- Managers can only manage their own training titles.

5.2.7 Training Title List - Generate Training Titles List

Managers and Directors have the ability to generate a list of all training titles in Excel file format by pressing the “Generate Training Titles List” button on the “Training Title List” page or by selecting the “Generate Training Titles List” sub-menu under the Training menu. The following information is included for each training title: ID, Title, Provider, Type, Length, Note, Created On date, and Number of Trainings recorded for the training title.

The screenshot shows the 'Training Title List' interface. At the top, there are three buttons: 'Add New Training Title', 'Upload Bulk Training Titles', and 'Generate Training Titles List'. The 'Generate Training Titles List' button is highlighted with a dashed orange border. Below the buttons, there is a 'Show 10 entries' dropdown and a search field. The main content is a table with the following data:

Training Title	Training Provider	Training Format	Training Length
"CHOPPED" LUNCH LADIES	MARIBEL WASMUTH/ RICH PRODUCTS	Face-to-Face	2 Hour(s) 00 Minutes
"FIRE UP SO YOU DON'T BURNOUT: HOW TO PREVENT, BREAK THROUGH, AND EXTINGUISH BURNOUT"	ISNA	Face-to-Face	1 Hour(s) 00 Minutes

5.2.8 Training Title List - Bulk Import of Training Titles

Managers and Directors have the ability to perform a bulk upload of training titles using the “Upload Bulk Training Titles” button on the “Training Title List” page.

The screenshot shows the 'Training Title List' interface. At the top, there are two buttons: 'Add New Training Title' and 'Upload Bulk Training Titles'. The 'Upload Bulk Training Titles' button is highlighted with a dashed orange border. Below the buttons, there is a 'Show 10 entries' dropdown and a search field. The main content is a table with the following data:

Training Title	Training Provider	Training Format	Training Length
"CHOPPED" LUNCH LADIES	MARIBEL WASMUTH/ RICH PRODUCTS	Face-to-Face	2 Hour(s) 00 Minutes
"WAKE ENVIRONMENTAL SANITATION, FOOD AND PUBLIC HEALTH SAFETY IN SCHOOL CAFETERIAS	SPECIAL GUEST SPEAKER: ASHLEY WHITTINGTON-HEALTH DEPARTMENT	Webinar/Video/Online Training	1 Hour(s) 00 Minutes

After clicking the button, you will be taken to the “Upload Bulk Training Titles” page.

This page provides controls to select and upload an Excel file with training titles data. The file must mirror the template spreadsheet linked from the page.

Upload Bulk Training Titles

» Upload Bulk Training Titles Instructions

Add multiple training titles by uploading a Microsoft Excel file based on the provided [template](#).
Make sure to enter in all required fields (*), remove the example row, and save and close the template file prior to uploading.

No file selected.

Click on the “template” link, shown in blue, and save the template file to your computer. The template contains the following columns:

- **Training Title Name** – required; enter a descriptive training title.
- **Training Hours** – required; enter a numeric value for Hours (whole number, 0 or greater).
- **Training Minutes** – required; enter a numeric value for Minutes (whole number, from 0 to 55 in increments of 5).
- **Training Format** – required; enter one of the following values: Face-to-Face, Webinar/Video/Online Training, Print Materials/Training Materials, Other.
- **Training Provider** – required; enter the instructor name or the provider organization or person.
- **Additional Information** – enter additional information and/or comments, if any.
- **Training Categories** – required; enter Learning Objectives separated by commas.

The file also contains a sample row. Use this row as a sample, then delete it from the spreadsheet.

Please make sure to include all of the required information (marked with *). Delete the example row (marked in red) prior to uploading.						
Training Title Name*	Training Hours* (whole positive number)	Training Minutes* (values from 0 to 55 in increments of 5)	Training Format* (Face-to-Face, Webinar/Video/Online Training, Print Materials/Training Materials, Other)	Training Provider*	Additional Information	Training Category Numbers (Learning Objectives)* (separated by commas)
Example Training Title - remove	1	15	Webinar/Video/Online Training	Best Provider Co	This is a very interesting training.	1120,1230,2130

Fill out and save the spreadsheet to your computer. Click “Browse” to locate the spreadsheet you just saved, then use the “Upload File” button on “Upload Bulk Training Titles” page to upload the file.

Upload Bulk Training Titles

» Upload Bulk Training Titles Instructions

Add multiple training titles by uploading a Microsoft Excel file based on the provided [template](#).
Make sure to enter in all required fields (*), remove the example row, and save and close the template file prior to uploading.

No file selected.

The “Review Uploaded Training Titles” page is displayed once the file is uploaded. The page displays a block of data entry controls for each training title imported from the MS Excel file.

The data entry fields are:

- Training Title,
- Training Provider,
- Training Format,
- Training Length (Hours and Minutes),
- Additional Information, and
- Training Categories - Learning Objective numbers.

Required fields are denoted by the asterisk (*).

The Training Categories control functions the same as on “Create Training Title” page (see Section 4.2.2.2). Click to expand each of the training categories to view sub-categories and the selected values, if any.

You can edit information in the fields on “Review Uploaded Training Titles” page if you want to change any values before being saved.

Blocks for training titles that were flagged by the import data validation as having errors, will be displayed in red. Error messages will be displayed for each field that has invalid or missing values in it.

Edit the fields to correct the errors, and as you do so, the error messages will disappear. Once there are no validation errors detected for a particular training title, its block will become blue.

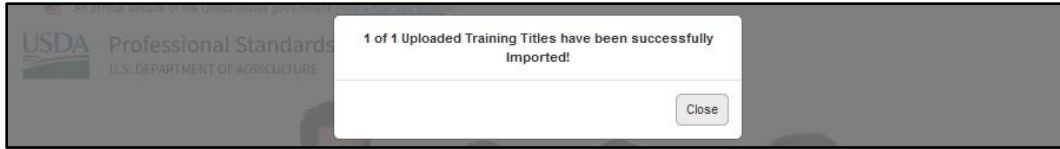
You can also delete any training title block by pressing the “Remove Training Title” button.

A confirmation dialog will be displayed. Once removed, this action cannot be undone.

Once you are done correcting and modifying the training titles data, use the “Import Training Titles” button to save the trainings.

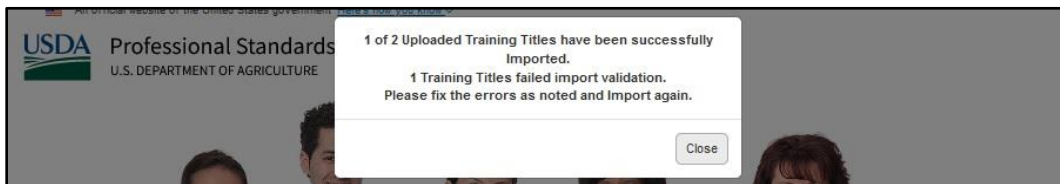
NOTE: Data entered will be checked to make sure no duplicate training title records are being created. Uniqueness of a training title record is determined by checking the combination of Training Title, Training Provider, and Training Format.

If all training titles are saved without errors, a confirmation dialog will be displayed, and you will be taken to the “Training Titles List” page after pressing the “Close” button.



If all or some training title records caused further errors while being saved, an error message will be displayed in the dialog.

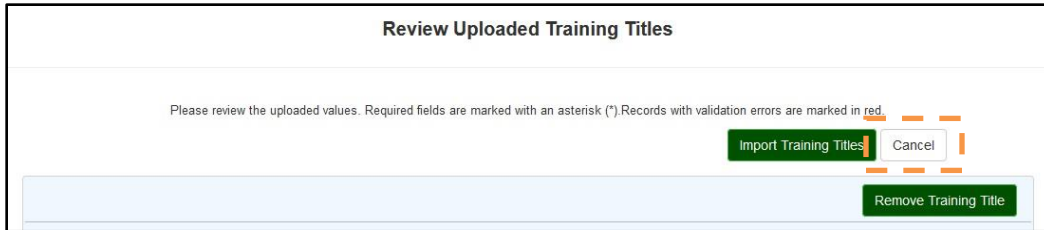
NOTE: The training title records that did not have any errors will be saved at this point and will be accessible through the PSTTT screens.



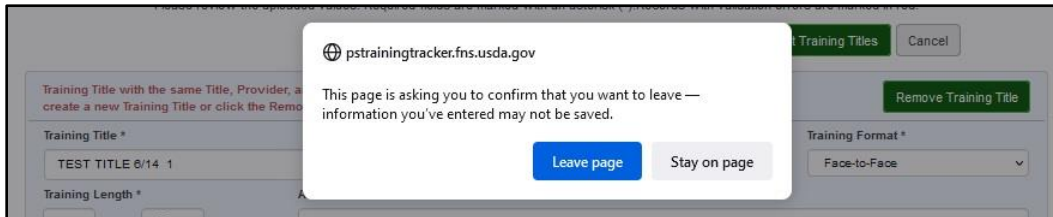
Any records with errors will be listed on “Review Uploaded Training Titles” page with the appropriate error messages.

You can edit the data for training titles with errors or use the “Remove Training Title” button for each training title block. Once you are done correcting and modifying the data, use the “Import Training Titles” button again to save.

You can also cancel the process of importing the training title records at any point by pressing the “Cancel” button on “Review Uploaded Training Titles” page. If some of the training title records were already saved, they will remain in the system, but the records still displayed on “Review Uploaded Training Titles” page will not be saved.



A confirmation dialog will be displayed since this action cannot be undone.



Press “Leave page” button to cancel, or press “Stay on page” button to stay on page and continue editing data in the training title blocks.

Once import process is complete, a success dialog is displayed, and the user is taken to the “Training Titles List” page.

5.2.9 Generate Training Titles List

The “Generate Training Titles List” option under the “Training” menu is available to Managers and Directors only. It produces an Excel file containing information for all training titles listed on PSTTT training titles database. The following information is included for each training title: ID, Title, Provider, Type, Length, Note, Created On date, and Number of Trainings recorded for the training title.

5.2.10 View Logged Certifications

The “View Logged Certifications” option under the “Training” menu opens the “View Logged Certifications” page which allows Managers and Directors to search and view certifications for their employees.

The “View Logged Certifications” page has an additional “Employees” control that allows to select one or more employees to view the certifications for. Only active employees who had once or more certifications logged are listed in the table.

NOTE: If no employees have any certifications logged, “No employees with Certifications found” message will be displayed, and all controls will be hidden.

Press the “Reset Search” button to clear any employees selected and get back to the original values of the Completion Date range (a year back from today) and Expiration Date range (empty).

View Logged Certifications
Select employee(s) and/or dates.

Employees * Select all employees in the table below

Search:

Select	Employee Name	Employee Number
<input checked="" type="checkbox"/>	Alder, Mary	12345
<input checked="" type="checkbox"/>	Bratski, William	12347
<input checked="" type="checkbox"/>	Brown, Marni	12349
<input checked="" type="checkbox"/>	Meyer, Linda	12435
<input checked="" type="checkbox"/>	Smith, Brandon	143567

Completion Date From: To:

Expiration Date Next 30 Days Next 90 Days Custom Range

From: To:

Show entries

Certification Name	Employee Name	Completion Date	Expiration Date
ALLERGY AND ANAPHYLAXIS Certificate	Smith, Brandon (143567)	2/26/2023	9/19/2023
CDE NSD COVID 19 UPDATE	Alder, Mary (12345)	10/4/2021	10/4/2023
CDE NSD COVID 19 UPDATE	Smith, Brandon (143567)	10/4/2021	10/4/2023
CDE NSD COVID 19 UPDATE	Meyer, Linda (12435)	10/4/2021	10/4/2023
CDE NSD COVID 19 UPDATE	Brown, Marni (12349)	10/4/2021	10/4/2023
CDE NSD COVID 19 UPDATE	Bratski, William (12347)	10/4/2021	10/4/2023
ServSafe	Smith, Brandon (143567)	3/7/2023	3/6/2028

Showing 1 to 7 of 7 entries

5.3 Changes to the Standard Functions – Reports

5.3.1 Selecting Employees

All reports require the user to select the set of employees the report is generated for. The set of employees available to be selected for a report depends on the access privileges of the user logged in. The Employee or Staff user can only run reports on their own training hours, so employee selection controls are hidden for them. Manager and Director users can run reports on their employees’ training hours as well as their own training hours.

The set of employees available for selection depends on the School Year selected – all employees active during this year are listed.

5.3.1.1 Selecting Employees – School User Category

School users select employees within their School District.

School Directors can select all, one, or several schools in their District. The Employees field is then populated with all employees for the school(s) selected, and the user should be able to select all, one, or several employees.

School Managers can select all, one, or several schools they are assigned to. The Employees field is then populated with all employees for the school(s) selected, and the user should be able to select all, one, or several employees.

Use the “Include Deactivated Employees” checkbox to include or exclude employees who are currently inactive in the report output.

The screenshot shows a web interface for selecting schools and employees. At the top, there is a dropdown menu for "School District" set to "ABC DISTRICT (AUTAUGA COUNTY)". Below it is a note: "Note: Please use the CTRL key when selecting or deselecting schools, to keep multiple selections." Underneath is a "School(s)" dropdown menu with options: "All Schools", "BLUE ROCK MIDDLE SCHOOL (11111)", "ROCK CREEK HIGH SCHOOL (11111)", and "SILVER SPRING ELEMENTARY SCHOOL (11111)". Below that is an "Employees" section with a checkbox "Select all employees in the table below" and a search box. A table lists employees with columns for "Select", "Employee Name", "Employee Number", and "Role". At the bottom, there is a checkbox "Include Deactivated Employees" which is checked.

Select	Employee Name	Employee Number	Role
<input type="checkbox"/>	Alder, Mary	12345	EMPLOYEE
<input type="checkbox"/>	Bratski, William	12347	EMPLOYEE
<input type="checkbox"/>	Bright, Alma	12111	DIRECTOR
<input type="checkbox"/>	Brown, Marni	12349	EMPLOYEE
<input type="checkbox"/>	Meyer, Linda	12435	MANAGER
<input type="checkbox"/>	Smith, Brandon	143567	MANAGER

School Employees can only generate reports for their own training records, so for them the Employee selection controls are hidden.

5.3.1.2 Selecting Employees – State User Category

State users select employees within their State.

State Directors and Managers can generate reports on State users in their state or on School users in their state – the selection is driven by the “Category” drop-down.

When SCHOOL is selected in the “Category” drop-down, the Employee selection controls are as described in Section 5.3.1.1, but a school District will need to be selected to populate the “Schools” and “Employees” controls.

When STATE is selected in the “Category” control, the “Employees” control is populated automatically.

Use the “Include Deactivated Employees” checkbox to include or exclude employees who are currently inactive in the report output.

Category: STATE

State: DELAWARE

Employees: Select all employees in the table below

Search:

Select	Employee Name	Employee Number	Role
<input type="checkbox"/>	Bristol, Lorna	13542	MANAGER
<input type="checkbox"/>	Buck, Bristol	24566	MANAGER
<input type="checkbox"/>	Ford, Ros	85414	MANAGER
<input type="checkbox"/>	Jones, Samuel		STAFF
<input type="checkbox"/>	Long, Maxine	789243	STAFF
<input type="checkbox"/>	Mathis, Maria		MANAGER
<input type="checkbox"/>	Naak, Swami		STAFF
<input type="checkbox"/>	Pete, Janica		STAFF
<input type="checkbox"/>	Roswill, Dwayne	13571	MANAGER
<input type="checkbox"/>	Sands, Amaya		STAFF
<input type="checkbox"/>	Seaman, Pete		STAFF

Include Deactivated Employees

State Staff can only generate reports for their own training records, so for them the Employee selection controls are hidden.

5.3.1.3 Selecting Employees – USDA User Category

USDA users select employees within their FNS Office.

FNS Office: NO-National Office

Employees: Select all employees in the table below

Search:

Select	Employee Name	Employee Number	Role
<input type="checkbox"/>	Appleseed, Sheldon		MANAGER
<input type="checkbox"/>	Brown, Janelya		MANAGER
<input type="checkbox"/>	Doe, John		MANAGER
<input type="checkbox"/>	Employee, New		MANAGER
<input type="checkbox"/>	Long, Angela		MANAGER

Include Deactivated Employees

FNS Managers can generate reports on all, one, or several Employees in their FNS Office.

Use the “Include Deactivated Employees” checkbox to include or exclude employees who are currently inactive in the report output.

5.3.2 Summary Report - Include Employees Without Trainings

For Managers and Directors, the Summary report has one additional option – the “Include Employees Without Trainings” checkbox. Summary report is run for employees selected in the Employees control. When the “Include Employees Without Trainings” checkbox is not selected, employees who do not have any trainings logged will not be included in the Summary report output. When the “Include Employees Without Trainings” checkbox is

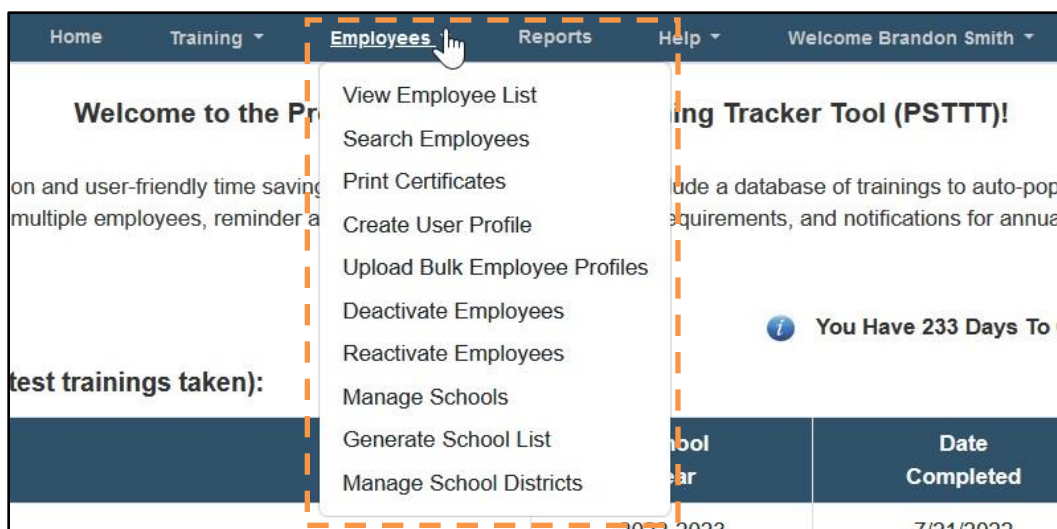
selected, employees without any trainings logged will be included in the Summary report output.

5.4 Changes to the Standard Functions – Welcome Menu

For Managers and Directors, the “User Profile” page under the “Welcome” menu has one extra button – “View User History” – and functions like the employee “User Profile” page described in Section 5.5.7.

The “View User History” buttons opens the “User History” page described in Section 5.5.8.

5.5 Employees Menu



The “Employees” dropdown menu has the following options:

- **View Employee List** – view the employees for which they may log trainings
- **Search Employees** – search for employees
- **Print Certificates** – print training certificates
- **Create User Profile** – create employee profiles
- **Upload Bulk Employee Profiles** – perform a bulk upload of employee profiles
- **Deactivate Employees** – deactivate employee accounts
- **Reactivate Employees** – reactivate employee accounts (Directors only)
- **Manage Schools** – manage schools (School Managers and Directors only)
- **Generate School List** – generate a list of schools in .XSLX format (School Managers and Directors only)
- **Manage School Districts** – manage school districts (School Directors only)

5.5.1 When Is an Employee “Active” And Visible To Me

PSTTT tracks employee activity periods based on their Hire Date, and any Deactivation and Activation dates available. Activity periods are those between the Hire Date and the Deactivation Date (if any), and between Reactivation Date and the next Deactivation Date (if any). If only the Hire Date is available, the employee is deemed active from that date forward.

Chris, Chris (Deactivated on 10/10/2020)	School Food Authority - All Other Staff (20 or more hours/week)		06:00	02:00
Dorman, Dora (Relocated)	School Food Authority - Manager		10:00	00:00

An employee is deemed **Active for a particular Manager or Director logged in** during a particular school year if:

1. **At the end of the school year selected employee’s assigned organization (state, school district, state) falls under the organization of the manager logged in.**
 - If an employee was assigned to your organization at the end of a given school year, they will be visible to you for that school year.
 - If an employee has started the school year under your organization and was moved to another organization before the end of the school year, they will not be visible for that school year.
 - If an employee was assigned to your organization at the end of a given school year, but was moved to another organization later, they will be visible for that school year with the status of Relocated.
2. **Employee has at least one activity period during the school year selected.** For the current school year, PSTTT assumed today’s date as the year end date for this rule.
 - If an employee was active under your organization for at least one day in a given school year, they will be visible to you for that school year.
 - If an employee has started the school year under your organization and was deactivated before the end of the school year, they will be visible for that school year with the status of Deactivated.
 - If an employee was assigned to your organization at the end of a given school year, but was deactivated later, they will be visible for that school year with the status of Deactivated.

5.5.2 View Employee List

The “View Employee List” option under the “Employees” menu opens the “View Employees” page which allows managers to search and view all their employees.

This page lists the Employee Name, Employee Number, Job Title, Badges (earned), Required (training hours), and Completed (training hours) for the employees visible to the user logged in (based on their permissions) that were active during the School Year selected in the drop-down.

NOTE: For School Staff Managers, this page will show the names of employees at each school in the manager's profile (except their own name).

NOTE: For School District Directors, this page will show the employees and managers at each school in the school district (except their own name).

NOTE: For State Agency Managers and Directors, this page will show the staff for their designated State (except their own name).

View Employees

Please click on for helpful tips. **Generate Employee List**

School Year 2022-2023

Note: Please use the CTRL key when selecting or deselecting schools, to keep multiple selections.

Filter Employees By Schools All Employees
BLUE ROCK MIDDLE SCHOOL
ROCK CREEK HIGH SCHOOL
ROSE GARDEN MIDDLE

Hide Current Inactive Employees

Show 10 entries Search:

Name	Employee Number	Job Title	Badges	Required	Completed
Alder, Mary	12345	School Food Authority - All Other Staff (20 or more hours/week)		06:00	00:00
Bratski, William	12347	School Food Authority - All Other Staff (20 or more hours/week)		06:00	00:00
Bright, Alma	12111	School Food Authority - District Director		12:00	00:00
Brown, Marni	12349	School Food Authority - Part Time Staff (less than 20 hours/week)		04:00	00:00
Carter, Marina	123488	School Food Authority - Non-Food Service Employee		00:00	00:00
DONALD, CRAFTER		School Food Authority - All Other Staff (20 or more hours/week)		06:00	00:00
Greyes, Simon		School Food Authority - All Other Staff (20 or more hours/week)		06:00	00:00
Horn, Rachel <small>(Deactivated on 1/6/2023)</small>		School Food Authority - Volunteer		00:00	00:00
LOPEZ, DANIEL		School Food Authority - District Director		12:00	00:00

School Manager and Director users can select one or more schools using the “Filter Employees By Schools” control to filter the employees shown in this area.

Use the “Hide Current Inactive Employees” checkbox to limit the employees displayed to those who are currently active.

Use the Search field to narrow down the selection by typing in one or more characters (letters or numbers) of the employee name and/or employee number. The entries in the table will be updated as you type.


You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.

“Generate Employee List” button opens an Excel file listing employee information for the School Year selected.

Clicking on an employee name on this page will take the manager to the employee’s account profile and allow drill-down into that employee’s information and training history.

If an employee was deactivated during the selected school year or later, the employee name will not be clickable, and the corresponding status will be listed as Deactivated.

If an employee was moved to a different office that does not fall under the jurisdiction of the user logged in after the end of the selected school year, the employee name will not be clickable, and the corresponding status will be listed as Relocated.

Chris, Chris <i>(Deactivated on 10/10/2020)</i>		School Food Authority - All Other Staff (20 or more hours/week)		06:00	02:00
Dorman, Dora <i>(Relocated)</i>		School Food Authority - Manager		10:00	00:00

5.5.3 Print Certificates

The “Print Certificates” option under the “Employees” menu opens the “Print Employee Certificates” page which allows managers to view and print completion certificates for any employee who has met or exceeded their annual training hours for the school year selected. The certificates printed for each employee are described in Section 4.5.2 for more information.

This page lists the Employee Name, Employee Number, Job Title, Badges (earned), Required (training hours), and Completed (training hours) for the employees visible to the user logged in (based on their permissions) that were active during the School Year selected in the drop-down.

NOTE: For School Staff Managers, this page will show the names of employees at each school in the manager’s profile.

NOTE: For School District Directors, this page will show the employees and managers at each school in the school district.

NOTE: For State Agency Managers and Directors, this page will show the staff for their designated State.

Print Employee Certificates

Please click on  for helpful tips.

School year 2019-2020 ▾

Select all employees.

Show 10 ▾ entries Search:

Select	Name ▲	Employee Number ↕	Job Title ↕	Badges 	Required ↕	Completed ↕
<input type="checkbox"/>	Chaveste, Michelle		School Food Authority - Part Time Staff (less than 20 hours/week)		4:00	8:00
<input type="checkbox"/>	De Los Santos, Helen <i>(Deactivated on 12/3/2020)</i>		School Food Authority - Manager		10:00	15:15

Showing 1 to 2 of 2 entries Previous 1 Next

[Print/Save Certificate](#)

You can re-sort the values by clicking on the table headers. You can also select the number of entries displayed per page and use the pagination controls below the table to navigate through all results found.

Use the Search field to narrow down the selection by typing in one or more characters (letters or numbers) of the employee name and/or employee number. The entries in the table will be updated as you type.

If an employee was deactivated during the selected school year or later, the employee name will not be clickable, and the corresponding status will be listed as Deactivated.

If an employee was moved to a different office that doesn't fall under the jurisdiction of the user logged in after the end of the selected school year, the employee name will not be clickable, and the corresponding status will be listed as Relocated.

The checkboxes next to the employee names allow the manager to select one or multiple names. Clicking the "Print Certificate" button will generate the certificates for all selected employees in a single PDF file. Each employee's certificate will be on a separate page in the PDF output.

5.5.4 Create User Profile

The "Create User Profile" option under the "Employees" menu opens the "Create User Profile" page which allows managers to create Employee profiles for employees who will not be logging into PSTTT, so that the manager can track training hours for them.

The functionality of the "Create User Profile" page used by Managers and Directors to create employee profiles is the same as the "Create User Profile" page that is described in Section 2.4. The fields displayed on Create User Profile for an employee are as follows:

- **First Name** – required; enter employee’s first name.
- **Last Name** – required; enter employee’s last name.
- **Employee Number** – optional; employee ID or number in your system.
- **Hiring Date** – required; enter your date of hire for the current position.
- **Business or Work Email** – enter employee’s email address, if available.
- **User Category** – required, read-only; populated with your User Category.
- **Role** – required; select the most appropriate value from the list of values based on User Category you selected.
- **Job Title** – required; select the most appropriate value from the list of values based on User Category and Role you selected.
- **State** – required, read-only; populated with your State.
- **School District** (for SCHOOL User Category only) – required, read-only; populated with your School District.

NOTE: If your School District is not in the list, please contact FNS staff at cnpntab@usda.gov with the request to add it.

- **School** (for SCHOOL User Category only) – required for Manager (multiple selection) and Employee (single selection) roles; select the most appropriate value from the list of values based on the School District you selected. School name is followed by its zip code in parenthesis. Type the first letter of the school district name into this field to have it jump to the closest match, then continue selection from the drop-down.
- **“Add New School” button** (for SCHOOL User Category only) – click this button to add a new school. For more information see Section 2.6.
- **Manager** – not available for Director Role; select the most appropriate value from the list of values.

Press the “Create” button to save your changes or press the “Cancel” button to return to the “Home” page without saving your changes. You will be able to edit your profile settings later using the “Edit User Profile” page as described in Section 4.5.5.

NOTE: if a previously non-eAuthenticated user logs into the tool with eAuthentication, and their email address, first name, and last name match, the two will automatically be combined in the Training Tool. The user will not then be asked to create a new profile when logging in for the first time.

5.5.5 Upload Bulk Employee Profiles

The “Upload Bulk Employee Profiles” option under the “Employees” menu allows Managers and Directors to perform a bulk upload of employee profiles from “Upload Bulk Employee Profiles” page.

This page provides controls to select and upload an Excel file with employee records data. The file must mirror the template spreadsheet linked from the page.

Please note that depending on your computer connection speed, files with more than 100 employee profiles may take a long time to upload. For faster results, it is recommended to upload in batches of 100.

Upload Bulk Employee Profiles

[Upload Bulk Employee Profiles Instructions](#)

Add multiple Employee Profiles by uploading a Microsoft Excel file based on the provided [template](#).
 School users can refer to the [Generate Schools List](#) (available under the Employees menu) to add requested school information to the template.
 Files with more than 100 employee profiles may take a long time to upload. For faster results, it is recommended to upload in batches of 100.
 Make sure to enter in all required fields (*), remove the example row, and save and close the template file prior to uploading.

No file selected.

Click on the “template” link, shown in blue, and save the template file to your computer. The template contains the following columns:

- **First Name** – required; enter employee’s first name.
- **Last Name** – required; enter employee’s last name.
- **Hiring Date** – required; enter employee’s hiring date in the MM/DD/YYYY format.
- **Email Address** – enter employee’s email address.
- **Employee Number** – enter employee number.
- **User Type ID** – required; enter one of the following numeric values:
 - 1 - School
 - 2 - State Agency
 - 3 - USDA FNS
- **User Role ID** – required; enter one of the following numeric values:
 - 1 - School District Director
 - 2 - School Manager
 - 3 - School Employee
 - 4 - State Director
 - 5 - State Manager
 - 6 - State Staff Employee
 - 7 - USDA FNS Manager
- **Job Title ID** – required; enter one of the following numeric values:
 - 7 - School Food Authority - District Director
 - 15 - School Food Authority - Assistant Director
 - 8 - School Food Authority - Manager
 - 9 - School Food Authority - Staff Full Time
 - 10 - School Food Authority - Staff Part Time
 - 21 - School Food Authority - Non-Food Service Employee
 - 22 - School Food Authority - Volunteer
 - 1 - State Agency - Director
 - 14 - State Agency - Assistant Director
 - 2 - State Agency - Staff

12 - FNS Manager

- **State Code** – required for School and State Agency users only; enter a 2-letter state code.
- **School ID/IDs** – required for School Manager and School Employee users only; enter one or more numeric school IDs separated by commas. Please refer to the Generate Schools List (available under the Employee tab) to look up the School ID.
- **District ID** – required for School users only; enter a numeric district ID. Please refer to the Generate Schools List (available under the Employee tab) to look up the District ID.
- **USDA FNS Office ID** – required for USDA FNS users only; enter one of the following numeric values:
 - 1 - NO - National Office
 - 2 - MARO - Mid-Atlantic Office
 - 3 - MWRO - Midwest Office
 - 4 - MPRO - Mountain Plains Office
 - 5 - NERO - Northeast Office
 - 6 - SERO - Southeast Office
 - 7 - SWRO - Southwest Office
 - 8 - WRO - Western Office

The file also contains a sample row. Use this row as a sample, then delete it from the spreadsheet.

Please make sure to include all of the required information (marked with *). Delete the example row (marked in red) prior to uploading.										
1	2	3	4	5	6	7	8	9	10	11
First Name*	Last Name*	Hiring Date* (MM/DD/YYYY)	Email Address (optional)	Employee Number (optional)	User Type ID*	Job Title ID*	State Code 2 letter state code	School ID(s) separated by commas (*required for School Manager and School Employee users only)	District ID (*required for School users only)	USDA FNS Office ID (*required for USDA FNS users only)
John	Doe	7/1/10	john@usda.gov	0345	1	7 - School Food Authority - District Director	TX	123456,789012	001	NO

Fill out and save the spreadsheet to your computer. Click “Browse” to locate the spreadsheet you just saved, then use the “Upload File” button on “Upload Bulk Employee Profiles” page to upload the file.

Upload Bulk Employee Profiles

• Upload Bulk Employee Profiles Instructions

Add multiple Employee Profiles by uploading a Microsoft Excel file based on the provided [template](#). School users can refer to the [Generate Schools List](#) (available under the Employees menu) to add requested school information to the template.

Files with more than 100 employee profiles may take a long time to upload. For faster results, it is recommended to upload in batches of 100. Make sure to enter in all required fields (*), remove the example row, and save and close the template file prior to uploading.

No file selected.

The “Review Uploaded Employee Profiles” page is displayed once the file is uploaded. The page displays a block of data entry controls for each employee profile imported from the MS Excel file.

The data entry fields are:

- First Name,
- Last Name,
- Business or Work Email,
- Employee Number,
- Hiring Date,
- Role,
- Job Title,
- State,
- District, and
- Schools.

Required fields are denoted by the asterisk (*):

- The State field is required for School and State Agency users.
- The District field is required for School users.
- The Schools field is required for School Managers and Directors.

You can edit information in the fields on “Review Uploaded Employee Profiles” page if you want to change any values before being saved.

Review Uploaded Employee Profiles

Please review the uploaded values. Required fields are marked with an asterisk (*). Records with validation errors are marked in red.

First Name * DORE	Last Name * GERON	Business or Work Email DGeron@basdk.net	Employee Number
Hiring Date * 04/20/1990	Role * EMPLOYEE	Job Title * School Food Authority - All Other Staff (20 or more hours/week)	
State * AL	District * ALABASTER CITY (SHELBY COUNTY)	Schools * CHILD COUNT ONLY (35007)	

Blocks for employee profiles that were flagged by the import data validation as having errors, will be displayed in red. Error messages will be displayed for each field that has invalid or missing values in it.

Edit the fields to correct the errors, and as you do so, the error messages will disappear. Once there are no validation errors detected for a particular employee profile, its block will become blue.

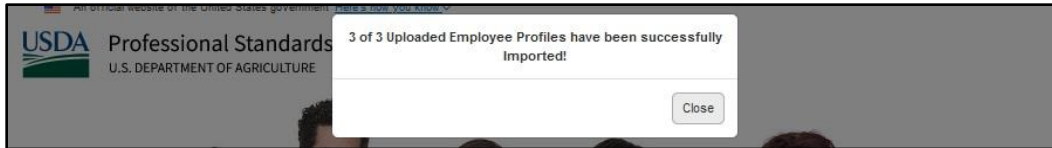
You can also delete any employee profile block by pressing the “Remove Employee Profile” button.

A confirmation dialog will be displayed. Once removed, this action cannot be undone.

Once you are done correcting and modifying the employee profiles data, use the “Import Employee Profiles” button to save the employee profiles.

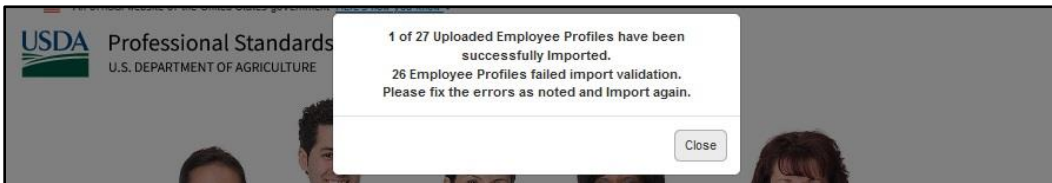
NOTE: Data entered will be checked to make sure no duplicate employee records are being created. Uniqueness of an employee record is determined by checking the combination of First Name, Last Name, Email Address and Employee Number.

If all employee profiles are saved without errors, a confirmation dialog will be displayed, and you will be taken to the “View Employees” page after pressing the “Close” button.



If all or some employee profile records caused further errors while being saved, an error message will be displayed in the dialog.

NOTE: The employee profiles that did not have any errors will be saved at this point and will be accessible through the PSTTT screens.



Any records with errors will be listed on “Review Uploaded Employee Profiles” page with the appropriate error messages.

You can edit the data for employee profiles with errors or use the “Remove Employee Profile” button for each employee profile block. Once you are done correcting and modifying the data, use the “Import Employee Profiles” button again to save.

You can also cancel the process of importing the employee profile records at any point by pressing the “Cancel” button on “Review Uploaded Employee Profiles” page. If some of the employee profile records were already saved, they will remain in the system, but the records still displayed on “Review Uploaded Employee Profiles” page will not be saved.

A confirmation dialog will be displayed since this action cannot be undone.



Press “Leave page” button to cancel, or press “Stay on page” button to stay on page and continue editing data in the employee profile blocks.

Once import process is complete, a success dialog is displayed, and the user is taken to the “View Employees” page.

5.5.6 Search Employees

The “Search Employees” option under the “Employees” menu opens the “Employee Search” page which allows managers to search for their active employees.

This page lists the Employee Name, Employee Number, and School District Name for School employees or State Agency name for State employees.

You can re-sort the values by clicking on the table headers.

Use the Search field to narrow down the selection by typing in one or more characters (letters or numbers) of the employee name and/or employee number. The entries in the table will be updated as you type.

School Manager/Director view – employees in the District:

Employee Search		
Use the fields below to search the table for the employee or employees you are wanting to find. Click on the employee name for more details about that employee.		
Employee Search Results		Search <input type="text"/>
Name	Employee Number	School/District Name
Aguayo, Silvia	abc111	GRACE S. THILLE ELEMENTARY
Aguirre-Castaneda, Kim		RENAISSANCE HIGH
Alamillo, Sandee		GLEN CITY ELEMENTARY
Showing 1 to 3 of 3 entries		Previous 1 Next

State Agency Manager/Director view – employees in the State:

Employee Search

Use the fields below to search the table for the employee or employees you are wanting to find. Click on the employee name for more details about that employee.

Employee Search Results Search

Name	Employee Number	State Agency
Biles, Rhonda		ALASKA
Hutchinson, Kenneth		ALASKA
Olack, Ann		ALASKA

Showing 1 to 3 of 3 entries Previous Next

Clicking on an employee name on this page will take the manager to the employee’s account profile and allows drill-down into that employee’s information and training history.

5.5.7 View Employee User Profile

The employee “User Profile” page is the same as the “User Profile” page described in Section 4.5.4. For managers and directors, this page allows to perform the following actions for the employee selected:

- Viewing the summary data.
- Editing employee’s profile information by pressing the “Edit” button (see Section 4.5.5).
- Viewing employee’s training history by pressing the “View Training History” button (see Section 4.5.1).
- Uploading training documents for this employee’s training records from the “Training History” page (see Section 4.2.1.3).
- Viewing employee history of roles, job titles, and organizations by pressing the “View User History” button (see Section 5.5.8).

User Profile

User Information	
First Name	Mary
Last Name	Alder
Employee Number	12345
Hiring Date	10/21/2018
Business or Work Email	
Category	SCHOOL
Role	EMPLOYEE
Job Title	School Food Authority - All Other Staff (20 or more hours/week)
State	ALABAMA
District	ABC DISTRICT (AUTAUGA COUNTY)

School Information					
School Name	School Type	District Name	City	State	Zip
BLUE ROCK MIDDLE SCHOOL	Regular School	ABC DISTRICT	SILVER SPRING	AL	11111

Edit
View Training History
View User History

5.5.8 View User History

The “View User History” button on “User Profile” page opens the “User History” page which allows the Manager and Director users to view employee’s role, job title, assigned location, and activity periods for every school year. It also allows Managers and Directors to change employee’s role and job title for any given school year within their organization.

School Year	Role	Job Title	State/Region	Assigned Locations	Activity Periods	Action
2018-2019	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	ALABAMA	ABC DISTRICT (AUTAUGA COUNTY) BLUE ROCK MIDDLE SCHOOL	10/21/2018 - 6/30/2019	Update
2019-2020	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	ALABAMA	ABC DISTRICT (AUTAUGA COUNTY) BLUE ROCK MIDDLE SCHOOL	7/1/2019 - 6/30/2020	Update
2020-2021	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	ALABAMA	ABC DISTRICT (AUTAUGA COUNTY) BLUE ROCK MIDDLE SCHOOL	7/1/2020 - 6/30/2021	Update
2021-2022	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	ALABAMA	ABC DISTRICT (AUTAUGA COUNTY) BLUE ROCK MIDDLE SCHOOL	7/1/2021 - 6/30/2022	Update
2022-2023	EMPLOYEE	School Food Authority - All Other Staff (20 or more hours/week)	ALABAMA	ABC DISTRICT (AUTAUGA COUNTY) BLUE ROCK MIDDLE SCHOOL	7/1/2022 - 9/15/2022	

[Back](#)

The table on “User History” page contains a row for every school year an employee was active with the role, job title, location, and activity periods listed.

If an employee held multiple positions in multiple organizations during a given school year, only the last organization / position combination is displayed, since the last position during a school year is used to calculate the number of required hours.

For each school year, activity period start and end date are listed for one or more activity period during which the employee was active.

Manager and Director users can update employee’s role and job title retroactively for each school year by pressing the corresponding “Update” button.

5.5.9 Edit Historical User Profile

The “Update” button on “User History” page opens the “Edit Historical User History” page that allows to update employee’s information retroactively for a particular school year.

The “Edit Historical User History” page is similar to the “Edit User Profile” page, however, it only applies to one school year, and allows to edit only the Role and Job Title. Press the “Update” button to save, or the “Cancel” button to cancel.

Edit Historical User Profile for 2019-2020 School Year
* Denotes required field

Edit User Profile Instructions

First Name *	<input type="text" value="Mary"/>
Last Name *	<input type="text" value="Alder"/>
Employee Number	<input type="text" value="12345"/>
Hiring Date *	<input type="text" value="10/21/2018"/>
Business or Work Email	<input type="text"/>
Category *	<input type="text" value="SCHOOL"/>
Role *	<input type="text" value="EMPLOYEE"/>
Job Title *	<input type="text" value="School Food Authority - All Other Staff (20 or more hours/week)"/>
State *	<input type="text" value="ALABAMA"/>
School District *	<input type="text" value="ABC DISTRICT (AUTAUGA COUNTY)"/>
Schools *	<input type="text" value="BLUE ROCK MIDDLE SCHOOL (11111)"/>

5.5.10 Deactivate Employees

The “Deactivate Employees” option under the “Employees” menu opens the “Deactivate Employees” page which allows the manager to select one or more active employees to deactivate. Controls on this page allow the manager to select one or more employees. Required fields are denoted by the asterisk (*).

The “Deactivation Date” field allows the user to enter the actual employee departure date. This date will be validated for each employee selected to make sure it falls into a time period when this employee was last active. If the employee was never deactivated before, the Deactivation Date has to be after their Hire Date; otherwise, it has to be after their last Activation Date.

State Agency Manager/Director view:

Deactivate Employees
Select one or more employees to deactivate
* Denotes required field

State * DELAWARE

Note: Please use the CTRL key when selecting or deselecting employees, to keep multiple selections.

Employees *
Bristol, Lorna (13542)
Buck, Bristol (24566)
Long, Maxine (789243)
Mathis, Maria

Deactivation Date * 9/15/2022

Deactivate Selected Employees Reset Search

School Manager/Director view:

Deactivate Employees
Select one or more employees to deactivate
* Denotes required field

School District * ABC DISTRICT (AUTAUGA COUNTY)

Note: Please use the CTRL key when selecting or deselecting schools, to keep multiple selections.

School(s) *
All Schools
BLUE ROCK MIDDLE SCHOOL (11111)
ROCK CREEK HIGH SCHOOL (11111)
SILVER SPRING ELEMENTARY SCHOOL (11111)

Note: Please use the CTRL key when selecting or deselecting employees, to keep multiple selections.

Employees *
Alder, Mary (12345)
Bratski, William (12347)
Bright, Alma (12111)
Brown, Marni (12349)

Deactivation Date * 9/15/2022

Deactivate Selected Employees Reset Search

Select one or more employees in the “Employees” field and press the “Deactivate Selected Employees” button. A confirmation dialog listing the selected employees will be displayed.

selections

School(s) * Employees Selected for Deactivation:
Alder, Mary (12345)
Bratski, William (12347)
Greyer, Eva (12345)

Deactivate selected Employees?

multiple

Employees * LOPEZ, DANIEL

Deactivate Cancel

Press the “Deactivate” button to deactivate the selected employees. Press the “Cancel” button to cancel.

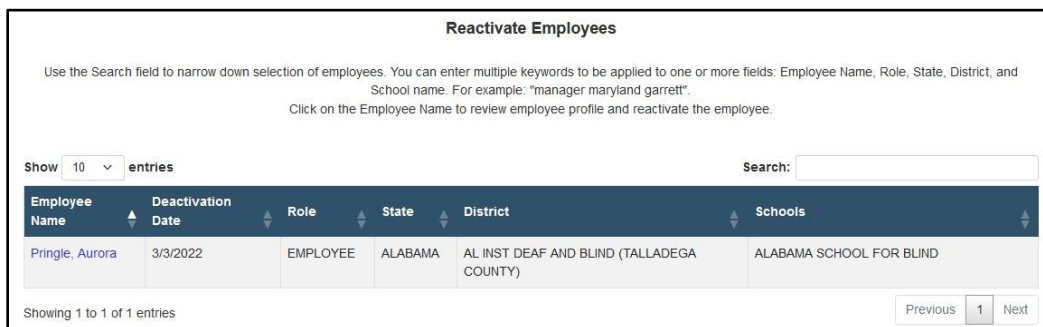
Confirmation dialog displayed after the deactivations are performed lists all employees who could not be deactivated with the corresponding reasons:



5.5.11 Reactivate Employees

The “Reactivate Employees” option under the “Employees” menu is available to Directors only. It opens the “Reactivate Employees” page which allows Directors to view all inactive employees in their organization.

Keywords entered into the Search control apply across all the fields represented in the table: Employee Name, Employee Number (if provided), Deactivation Date, Role, State, District (for School Directors only), and School names (for School Directors only). The simplest way would be to enter the employee name, and then enter additional keywords if necessary.



Click on the employee name to reactivate the employee from the “Edit User Profile” page.

You may need to adjust employee’s role, job title, etc. and enter the Reactivation Date if it is different from today’s date. For these inactive employees, the “Update” button on the “Edit User Profile” page will be replaced with the “Reactivate” button.

5.5.12 Manage Schools (School User Category Only)

The “Manage Schools” option under the “Employees” menu is available to Managers and Directors in the School User Category only. It opens the “Manage Schools” page which allows the manager to view and manage schools in their school district.

Manage Schools
Select a school to edit

State:

School District:

School Name	Type	City	State	Zip	Action
BLUE ROCK MIDDLE SCHOOL	Regular School	SILVER SPRING	AL	11111	Edit
ROCK CREEK HIGH SCHOOL	Regular School	SILVER SPRING	AL	11111	Edit
SILVER SPRING ELEMENTARY SCHOOL	Regular School	SILVER SPRING	AL	11111	Edit
THE BEST SCHOOL	Regular School	BALTIMORE	AL	11112	Edit

[Add New School](#)

Press the “Add New School” button to open the “Create New School” page.

Select a School and click on the corresponding “Edit” link to open the “Edit School” page for the selected school.

5.5.12.1 Create New School

Use the “Create New School” page to add a new school.

Create New School
To add a new school, enter the new school details and click Create button.
* Denotes required field

State *

County *

District *

School Name *

School Type * [School Types Guidance Chart](#)

Address

City *

Zip *

[Create](#) [Back to List](#)

The following fields will display on Create New School page. Required fields are denoted by the asterisk (*).

- **State** – required, populated with your State, disabled.
- **County** – required, populated with your District’s county, disabled.
- **District** – required, populated with your District’s name, disabled.
- **School Name** – required. Please enter the full, official school name.
- **School Type** – required. Please select your school type.
- **Address** – Please enter the street address.

- **City** – required. Please enter the City from the School’s mailing address.
- **Zip** – required. Please enter the Zip Code from the School’s mailing address.

NOTE: The combination of the School Name and Zip is required to be unique.

The following actions are available:

- **Create** – save the data entered to create a new District.
- **Back to List** – cancel all the changes and go back to Manage School Districts page.

When finished with all required fields, click “Create” button to create a district.

5.5.12.2 Edit School

Use the “Edit School” page to edit school information.

Edit School

To update a school, enter the school details and click Update button.

* Denotes required field

State * ALABAMA

County * AUTAUGA COUNTY

District * ABC DISTRICT

School Name * BLUE ROCK MIDDLE SCHOOL

School Type * [School Types Guidance Chart](#)
Regular School

Address

City * SILVER SPRING

Zip * 11111

The following fields will display. Required fields are denoted by the asterisk (*).

- **State** – required, populated with your State, disabled.
- **County** – required, populated with your District’s county, disabled.
- **District** – required, populated with your District’s name, disabled.
- **School Name** – required. Please enter the full, official school name.
- **School Type** – required. Please select your school type.
- **Address** – Please enter the street address.
- **City** – required. Please enter the City from the School’s mailing address.
- **Zip** – required. Please enter the Zip Code from the School’s mailing address.

The following actions are available:

- **Update** – save the data entered.

- **Cancel** – cancel all the changes and return to “Manage Schools” page.

When finished with all the updates, click “Update” button to update District information and return to the Manage School Districts page.

5.5.13 Generate School List

The “Generate School List” option under the “Employees” menu produces an Excel file containing information for all schools in your district. The following information is included for each school: School ID, School Name, District ID, District Name, State, County Name, City, Zip, Created On date, and Number of Employees currently assigned to the school.

5.5.14 Manage School Districts (School User Category Only)

The “Manage School Districts” option under the “Employees” menu opens the “Manage School Districts” page which allows school directors to edit their School District information.

Press the “Edit School District” button to open the “Edit School District” page for your district.

5.5.14.1 Edit School District

School directors have capability to edit their School District information.

The following fields will display on Edit School District page. Required fields are denoted by the asterisk (*).

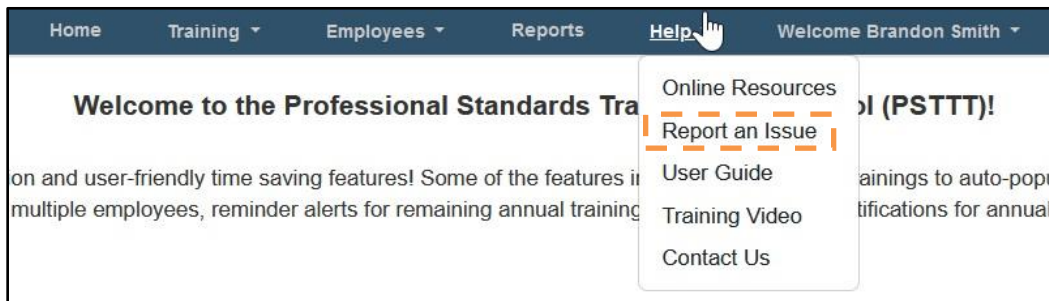
- **State/Territory** – required, populated with your State, read-only.
- **County** – required, read-only.
- **District Name**– required; enter your district name.
- **Zip** – required; enter mailing address zip code.

The following actions are available:

- **Update** – save the data entered and go back to the “Manage School Districts” page.
- **Back to List** – cancel all the changes and go back to the “Manage School Districts” page.

5.6 Help Menu

The Help dropdown menu for Managers and Directors has one additional option – “Report an Issue” which is used to submit an issue report or a data change request.



The “Report an Issue” form page displays data entry fields for the user to allow them to submit an issue report or a data change request.

The asterisks mark the required fields. The User Name and Email from the logged in user are populated by default but may be changed by the user.

This form provides the following fields. Required fields are denoted by the asterisk (*).

- **Summary** - required; the summary of the issue or a request.
- **Description** - the detailed description of the issue or a request.
- **Name** - required; requestor’s name.
- **Email Address** - required; the email address that should be used for correspondence.
- **Attach File** – any additional information can be attached as a file.

Report an Issue
Provide detailed explanation of the issue or your request.
* Denotes required field

Summary *

Description

Name *

Email Address *

Attach File No file selected.

Press the “Create” button to submit your issue. A confirmation dialog will be displayed with the buttons representing the following choices:

- **Return to Dashboard** – press to go to the “Home” page
- **Report New Issue** – press to return to the “Report an Issue” page and report another issue.