NAB National Association of Long Term Care Administrator Boards

National Association of Long Term Care Administrator Boards

NCERS Sponsor User Guide

(updated 4/6/2011)

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I. How do I register to become a **NEW** Sponsor?

a. In the toolbar on the header, click on "Register"

b. Enter all the necessary information on the sponsor registration page (all required fields shown in RED).

c. ALL new sponsors must indicate that they have read and agree to rules and regulations for NCERS. In order to do this, at the bottom of the screen, there is a security code that will have to be entered. Enter the code and then click "I Agree."

d. After you agree to the terms, you can submit payment for your membership by either credit card (your membership will be activated as soon as payment is confirmed) or by check (your membership will be activated once the check has been deposited by NAB). Please note, after you have registered to become a new sponsor, the NCERS Coordinator will need to activate your membership before you can submit programs for review. (A credit card transaction will receive a faster activation then a check payment.)

e. After the NCERS Coordinator has activated your membership, you will receive an email notifying you of your sponsor status. Your sponsorship is good for one year. During this time, you will be able to submit programs for review (as long as the program start date is within the length of your sponsorship registration).

f. If you saved any programs while your membership was being activated, you will need to go into the system and submit them for review.

   i. From your account home page, under program status, click on "saved." A list of saved programs will show up. Click on the program that you would like to submit for review. It will take to you the last completed step of the program and you will be able to submit payment.

II. How do I login to the system?

a. In the toolbar on the header, enter your user name and password and click on "Login"

III. Using the Screen Toolbar

a. Home → You will be able to view any messages that the NCERS Coordinator has sent to you though our system. You will also be able to pull up any programs that are under the review process, are approved, are saved, have been submitted, are expired or have been denied.

b. Account → You can check information regarding your NCERS Account including:

   i. Annual Fee Information → You can pay your annual sponsor membership or upgrade your membership for the following sponsor types: Regular, Corporate 10 (*Companies that want to hold up to 10 "private" programs each year that are only available to their employees. Corporate 10 sponsors also have the ability to hold as many "public" programs as they would like to within that year*) and Corporate 10+ (*Companies that want to hold more than 10 "private" programs each year that are only available to their employees. Corporate 10+ sponsors also have the ability to hold as many "public" programs as they would like to within that year)*

ii. Sponsor Information → This area lists all your company information. If your company has new contact information or the primary contact for your company has changed, this is where you need to update it.
iii. User Information → The user information panel allows a user to: 1. view/edit their contact data [address, phone, fax, title] associated with **their** account 2. change their password.

c. Add/Edit Programs → This is where you will enter any programs that you want to have NCERS review. You can also edit any "saved" programs by clicking on this tab.
d. Users → If you would like to have multiple individuals from your company be able to enter programs on behalf of your company, enter them in this section
e. Speakers/Developers → Any speakers (Live Programs) or developers (Distance Learning Programs) need to be entered in this section before you can assign them to any of your programs.
f. Program Sites → Program sites/additional dates of programs are entered in this section
g. Reports → There is a "Payment History" Report for sponsors to use. To run the report, click on Reports → Load Report → Run Report. You will see a list of all transactions that have been made.

IV. How do I retrieve my password if I have forgotten it?

a. In the toolbar on the header, click on "Forgot Your Password"
b. Enter your user name and email and click "Reset Password"
c. Once the NCERS Coordinator has reset your password, your new password will be emailed to you. **Please note,** this does not automatically generate an email to you with your password. The NCERS Coordinator will receive an email and have to manually reset your password and then email you the updated information. If you need your information immediately, please contact the NCERS Coordinator at (202) 712-9040 during regular business hours.

V. How do I enter an "In-Person" program (*Program must be In-Person, previously a "Seminar"*)?

a. Login to the system
b. Click on Add/Edit Programs. All information in RED is required before you can continue to the next screen.
c. **STEP 1:** You will need to enter the following items:
   i. Program name – The name of your program as it will appear on registration materials.
   ii. Name of the person entering the program - If you are already listed in the database as a "User" for the sponsor, you will be able to select your name from the drop down box where is says "Existing Contacts" and your contact information will automatically populate. You may also manually enter your contact information.
   iii. Intended Audience – Indicate whether this program is intended for Nursing Home Administrators (NHA), Residential Care/Assisted Living Administrators (RCAL) or both NHA/RCAL. **NOTE:** If you are indicating that a program is for both NHA **AND** RCAL, you must select at least one NHA Domain of Practice and one RCAL Domain of Practice for

each session within a program. For example, if part of your program applies to NHA **AND** RCAL and part only applies to one specific audience either NHA and/or RCAL, you must submit this as separate programs, one program being the sessions that apply to both NHA **AND** RCAL and one program with the sessions that apply only to NHA and/or RCAL.

iv. Learning Objectives/Competencies

v. Attendance/Participation Verification – List how you plan to monitor attendance to ensure that attendees are receiving credit for only the time that they attended.

vi. Program Type – Select "In-Person" (**for Live, In-Person Programs ONLY**)

d. **STEP 2:** You will have the following options:

i. Media Types – This is ***not*** a required area for in-person programs, but, if you would like to list a media item that you will be using in your "In-Person" program, you will enter it in this section

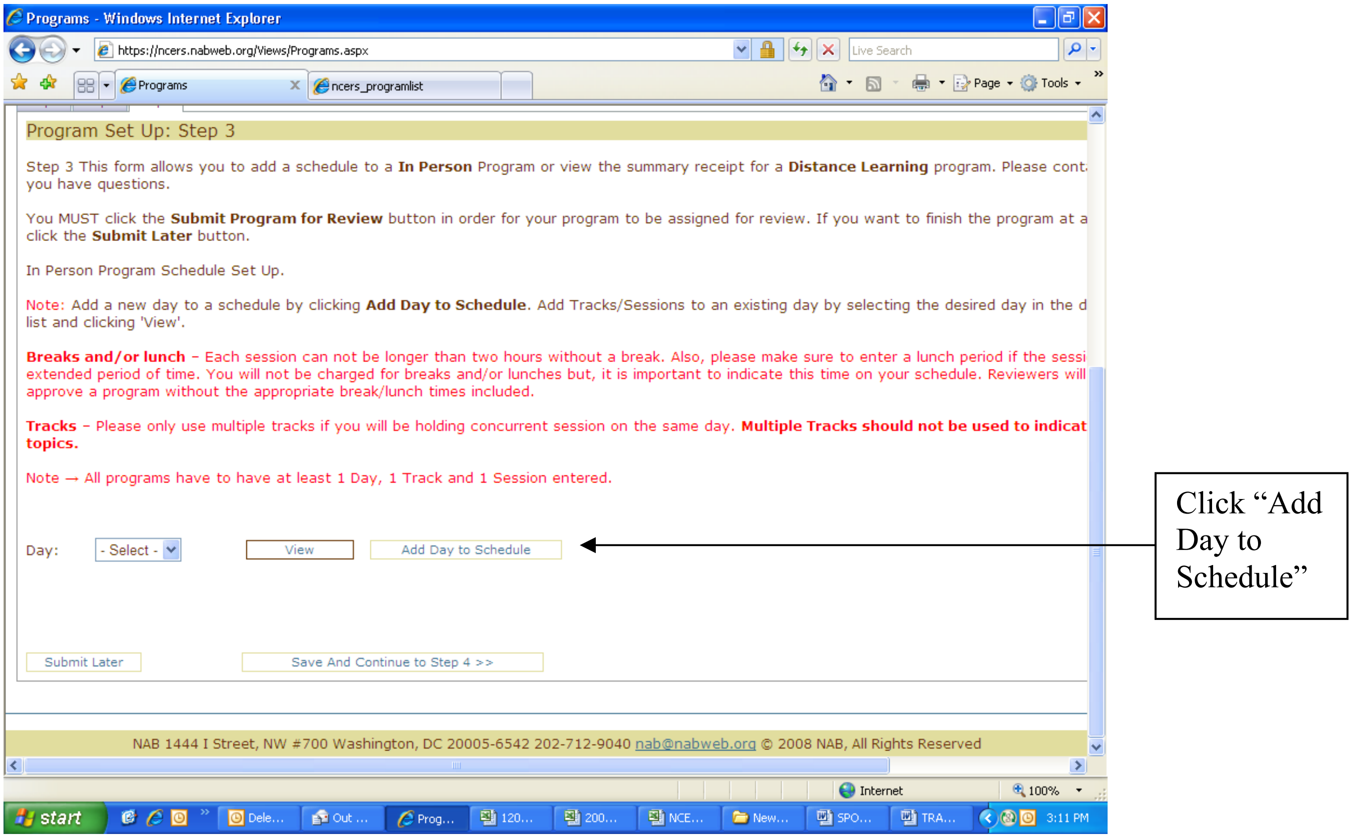
1. Select your media type from the drop down list
2. For each media item that you select you will be required to enter the information in RED.

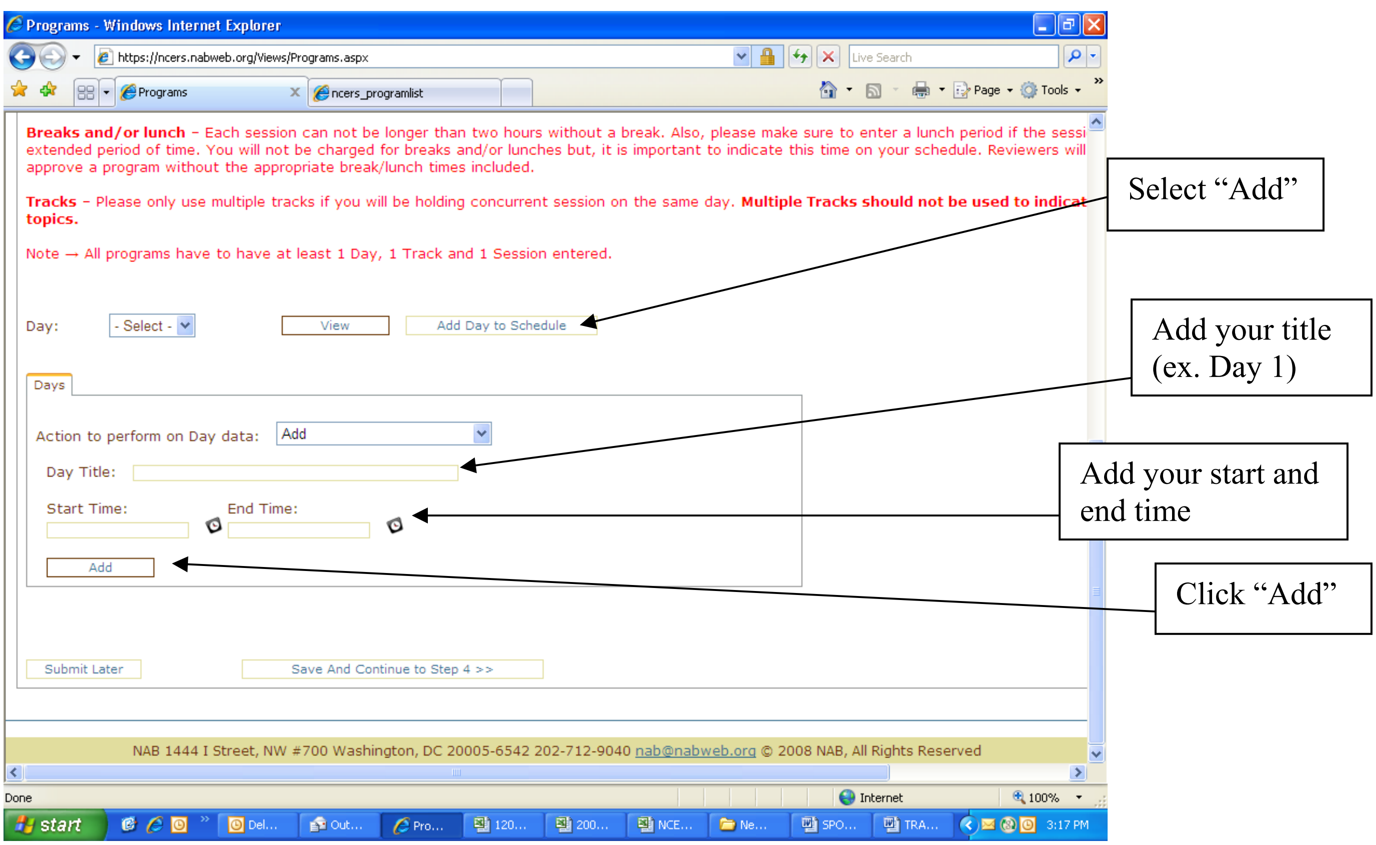
ii. Describe relevance to Assisted Living Administrators and/or Nursing Home Administrators

iii. Describe method for issuing certificate – **ALL** programs both "In-Person" and "Distance Learning" have to issue certificates. In this section, please describe how you will issue certificates to attendees.

e. **STEP 3:** This section is where you will add your schedule of your program. You will be able to add multiple days and tracks to each program you enter. **NOTE: EACH PROGRAM MUST HAVE ATLEAST 1 DAY, 1 TRACK and 1 SESSION.**

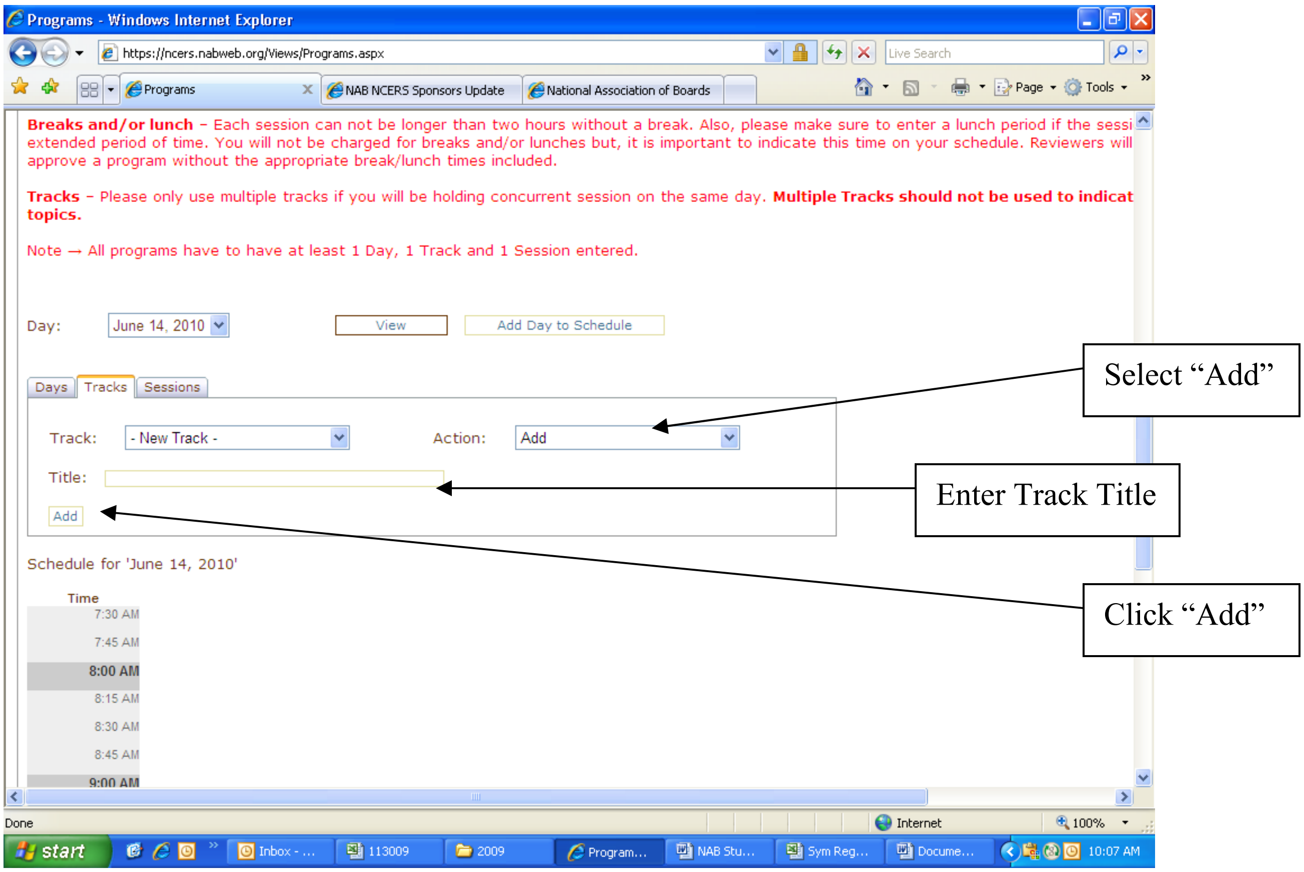
i. Days - Click "Add Day to Schedule" – You will need to add each day as well as the start and end times for that day. Do not omit lunch or break times. ***Time will be billed on the full hour but, credit will be issued on the quarter hour***. After you have entered the "Day Title" and the "Start" and "End" times, click "Add." If you will be holding a program over multiple days, repeat this step. Below are the screens that you will see –





NOTE: Repeat this process if your program will be more then one day long.

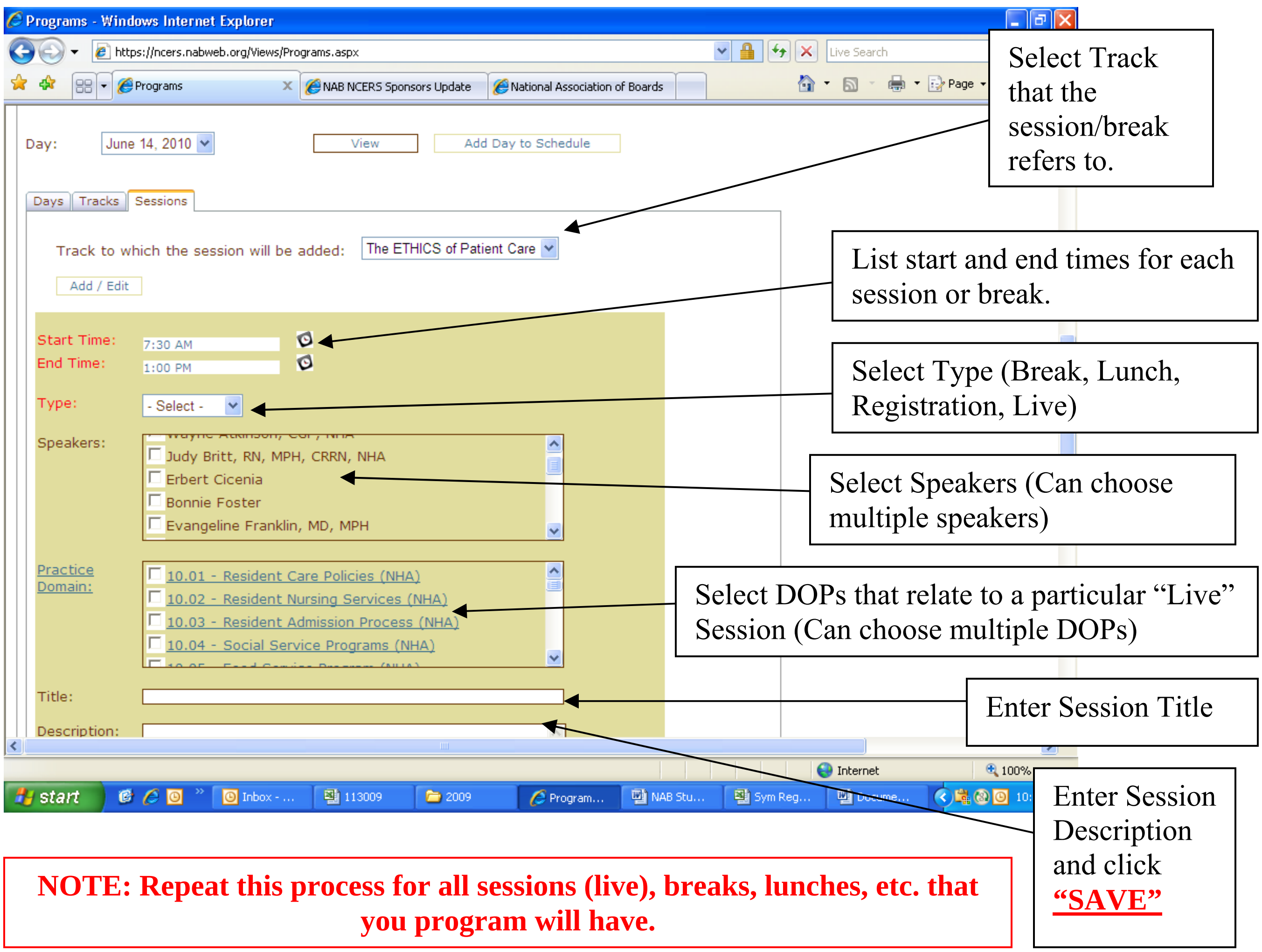
ii. <u>Tracks</u> - Next, you will need to enter the number of "Tracks" for your program. In the "Track" Tab, the drop down will automatically indicated "New Track" and in the "Action" drop down, indicate "Add." A box will appear where you can enter the track(s). After you named your first "Track" click "Add." Repeat this step if you will be offering multiple tracks during this program. **NOTE: YOU ONLY NEED TO USE MULTIPLE TRACKS IF YOU WILL BE HOLDING CONCURRENT SESSIONS.** Below is the screen that you will see –



NOTE: Repeat this process if your program will have multiple tracks with concurrent sessions

1. If you add a track by mistake, you can also remove the track by selecting the track name in the menu drop down and in the "Action" drop down select delete.

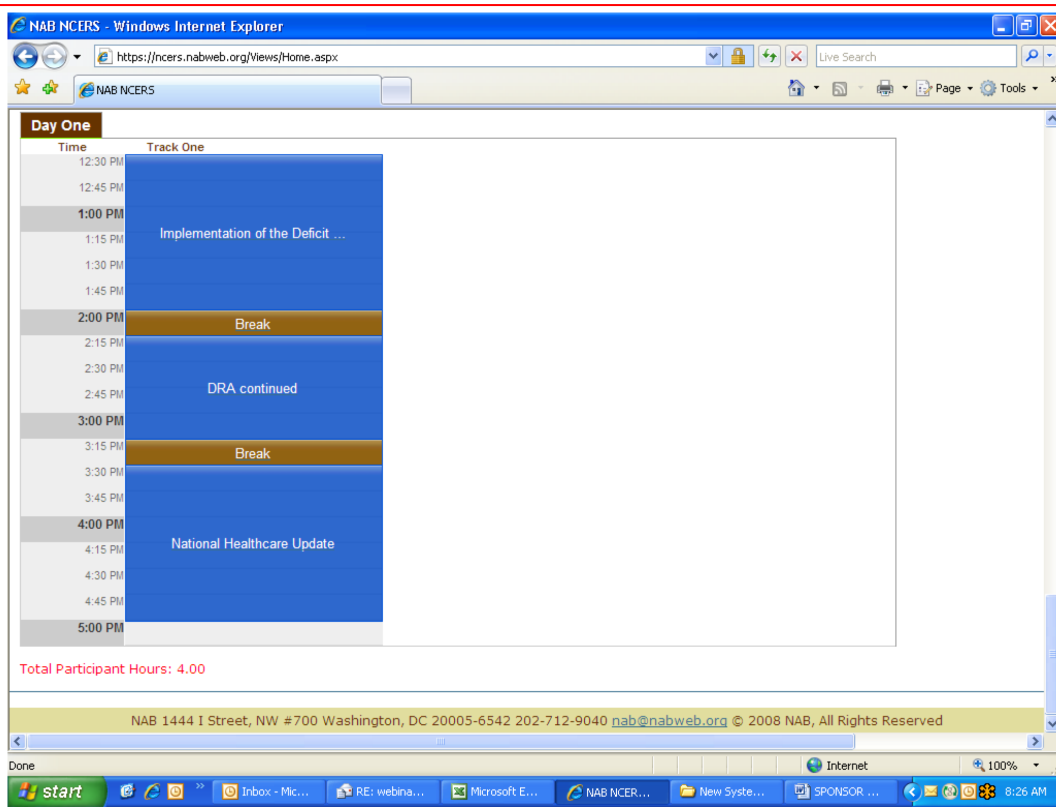
iii. <u>Session</u> – If you are entering a program with only one session or a number of sessions, this is where you will enter the information. Click on "Add/Edit" and a pop-up screen will come up for you to enter your information. Please note, the new system will allow for a complete schedule to be listed. In addition to the "Live" hours that credit will be issued for, NAB requires that you include breaks and lunch times (if applicable). Based on this information reviewers will determine if the program is long enough to require a break or meal. If a break or meal period is deemed necessary, but has not been listed, your program may not receive full approval. *Please review the NAB Procedures regarding break times.* **You will only be charged for time that is indicated as being "Live."** Below is the screen that you will see –



NOTE: Repeat this process for all sessions (live), breaks, lunches, etc. that you program will have.

1. Start Time/End Time – For each item you list (Registration, Break, Lunch, Live, Non-Active, Dinner, Social) you will need to indicate what time the item starts and when it ends.
2. Type - Registration, Break, Lunch, Live, Non-Active, Dinner, Social. You will only be charged for "Live" time.
3. Speakers – **Will only be required for "Live" time.** A list of speakers will show up that have previously been entered by the sponsor.
4. Domains – **Will only be required for "Live" time.** Please select, from the list of Domains that relate to the "Live" portion of the program you are entering. Note: Multiple domains can be selected.
5. Title – You will need to list a title for all items, including breaks, lunches, etc. However, they can be as generic as "Lunch" or as detailed as session titles like "Part 1: Health Care Reform in 2009."
6. Description - **Will only be required for "Live" time.** This is where you will enter a description of what will be learned in each session. Once you have entered the necessary information, click "Save" and you will be able to repeat this step.

Below is a sample of what a complete one-day, one track program will look like.



7. Continuing to Step 4: ***Please note, once you continue to Step 4, you will be unable to make changes to your schedule.*** Please make sure all information is correct and complete before you continue to Step 4.

iv. Step 4: In this section, you will add the "Initial Program Start Date" and will also be able to review your program one last time.

1. Late Fee: All sponsors (Regular, Corporate and Academic) will be charged a late fee if the program is scheduled to start within 45 days of the program start date (For Certified Sponsors **Only**, the late fee is charged within 15 days). After you select your date, click save and continue. If your program is charged a late fee, you will receive a pop-up message before continuing on to the next step. If you choose to push back your start date, you will be able to correct it at this time before continuing forward.
2. Reviewing Your Program: In this section, you will be able to review your program one last time before you submit payment. If you find that you need to make changes to any portion of your program, scroll back to the top of the screen and you will see tabs with the above four steps on them. Click on the tab that you would like to edit if you need to make changes. You will be unable to edit any part of your schedule (Step 3). After you make changes, you MUST click save and continue to the remaining steps. At the review section, you will see your updated changes.
3. Paying For Your Program: At the bottom of the screen, you will be able to pay for your program by either credit card (your program will be assigned as soon as payment is confirmed) or by check (your program will be assigned once the check has been deposited by NAB). Enter the necessary payment information and click "Submit Program for Review." Once you have submitted the program, **NO** changes will be allowed to be made. Your program will now also be found in the "submitted" file on your account home page.

VI. How do I enter a "Distance Learning Program" (*Printed Material, Web-based, CD/DVD/Videotape, Teleconference or Video and Audio Conference*)?

a. Login to the system
b. Click on Add/Edit Programs. Before continuing all required fields (shown in red) must be completed.
c. **STEP 1:** You will need to enter the following items:

i. Program name – Enter the name of your program as it will appear on registration materials.

ii. Name of the person entering the program - If you are already listed in the database as a "User" for the sponsor, you will be able to select your name from the drop down box where is says "Existing Contacts" and your information will automatically populate. You may also manually enter your contact information.

iii. Intended Audience – Indicate whether this program is intended for Nursing Home Administrators (NHA), Residential Care/Assisted Living Administrators (RCAL) or both NHA/RCAL. **NOTE:** If you are indicating that a program is for both NHA **AND** RCAL, you must select at least one NHA Domain of Practice and one RCAL Domain of Practice for each session within a program. For example, if part of your program applies to NHA **AND** RCAL and part only applies to one specific audience, either NHA and/or RCAL, you must submit this as separate programs, one program being the sessions that apply to both NHA **AND** RCAL and one program with the sessions that apply only to NHA and/or RCAL.
iv. Learning Objectives
v. Attendance Verification – List how you plan to monitor attendance to ensure that attendees are receiving credit for only the time that they attended.
vi. Program Type – Select "Distance Learning" (**for Printed Materials, Web-based, CD/DVD/Videotape, Teleconference and Video & Audio Conference Programs ONLY**)
vii. Registration Weblink – This is an optional area, if you put in a registration weblink, you will be charged an additional $70.

d. **STEP 2:** You will have the following options:
   i. Media Types – This is a required area for distance learning programs.
      1. Select your media type from the drop down list (*Printed Material, Web-based, CD/DVD/Videotape, Teleconference or Video and Audio Conference)*
      2. For each media item that you select you will be required to enter the information in RED. This information will act as your "schedule" and also determine the total number of hours that you are requesting. **NOTE:** When referencing "Credit Hours" for each media item, please only indicate the hours it takes to complete the media item (**Do not** include the time it takes to complete the pre and post test, these credit hours will be added separately [not applicable to Teleconference or Video and Audio Conferences]). To determine the amount of credit hours, please follow the specifications below:

         CD/DVD/Videotape, Teleconference or Video and Audio Conference: The amount of time it takes to view/listen to the media item.

         Printed Material: 1 CEU for every 15 pages of double space pages (text only).

         Web-based: 1 CEU for every 15 pages of double space pages (text only).
      3. Pre- and Post-Test: For each media item that you use - Printed Material, Web-based and CD/DVD/Videotape – you will be required to have a pre **AND** post test. In accordance with NCERS Procedures, "A minimum of 5 multiple choice or

true/false questions per CEU for both pre- and post-tests" must be submitted as part of the review process. Questions can be the same for both the pre- and post-test. The system will automatically show you, in RED, the number of questions per media item that you will need to submit. ***Test time will be eligible for CEU credit and should not be included in the time you have allotted for each media item***. **IMPORTANT:** After you have submitted and paid for your program, and before your program can be reviewed, you must email your pre- and post-test questions to the NCERS Coordinator at nab@nabweb.org. In the subject line please list your sponsor name and the name of the program.

4. Web-Based: For web-based programs, a PDF or Word document of the text is required to be sent to the NCERS Coordinator. CEU credit is issued based on the following NCERS Procedure, "A minimum of 15 double-spaced pages (PDF or Word format required) per CEU if printed or web-based." **IMPORTANT:** After you have submitted and paid for your program, and before your program can be reviewed, you must email your text document to the NCERS Coordinator at nab@nabweb.org. In the subject line please list your sponsor name and the name of the program.
5. Printed Material OR CD/DVD/Videotape: If you are submitting a distance learning program that consist of either printed material or CD/DVD/Video, you must also submit 4 copies of the media item to the NAB office before your program can be reviewed.

ii. Describe relevance to Assisted Living Administrators and/or Nursing Home Administrators

iii. Describe method for issuing certificate – **ALL** programs, both "In-Person" and "Distance Learning", have to issue certificates. In this section, please describe how you will issue certificates to attendees.

iv. Rational for Requested Hours: Enter the reasoning for the hours you are requesting.

v. Additional Reviewer Instructions: Enter any additional information that a reviewer may need to help them review the program.

vi. Selected Developer of Distance Learning Program: Select the person or persons who developed this distance learning program (See section IX about entering speakers/developers).

vii. Enter Initial Program Start Date: Enter the date of when you will start to offer the program.

1. Late Fee: All sponsors (Regular, Corporate and Academic) will be charged a late fee if the program is scheduled to start within 45 days of the program start date (For Certified Sponsors **Only**, the late fee is charged within 15 days). After you select your date, click save and continue. If your program incurs a late fee, you will receive a pop-up message before continuing on to the

next step. If you choose to push back your start date, you will be able to correct it at this time before continuing forward.

e. **STEP 3:** You will be able to review and edit your program one last time before your program is sent to review. Once you click "submit program for review" you will not be able to edit your program.

f. **STEP 4:** Paying For Your Program

   i. At the bottom of the screen, you will be able to pay for your program by either credit card (your program will be assigned as soon as payment is confirmed) or by check (your program will be assigned once the check has been deposited by NAB). Enter the necessary payment information and click "Submit Program for Review." Once you have submitted the program, NO changes will be allowed to be made. Your program will now also be found under the "submitted" category on your account home page.

VII. What happens after I submit my program for review?

a. Once payment and supporting documents have been received (if applicable), the NCERS Coordinator will assign your program for review. The review process usually takes about 30 days. It is important that you submit complete and accurate data so that they review process is completed in a timely manner. Once your program has been sent out to reviewers, the program will now be located under the "reviewing" category on your account home page. After the review is complete, you will receive notification from NAB.

   1. <u>Approved:</u> An email notification will be sent out to you if your program was approved with the approval number.
   2. <u>Partial Approval:</u> If the reviewers felt that further information was need before granting you a full approval of requested clock hours, the NCERS Coordinator will notify you of the additional information that is needed (please refer the NAB Procedures on Partial Approval for additional details).
   3. <u>Denial:</u> If your program is denied, the NCERS Coordinator will contact you with details on why your program was denied.

VIII. How do I upgrade my sponsor membership?

a. Account → Annual Fee → Upgrade Membership → Choose the category use wish to change to (Regular, Corporate10 or Corporate 10+)

b. After you have selected your new sponsor membership, you will need to submit payment. When you change your sponsor membership category, payment will have to be received by NAB before you can submit programs.

c. If you wish to downgrade your membership category, you must contact the NCERS Coordinator at nab@nabweb.org.

IX. How do I renew my sponsor membership?

a. Account → Annual Fee → Add Membership for Sponsor

b. After you have added your membership, you will need to submit payment.

X. How do I add a speaker/developer? – If you are a new sponsor, you will need to add your speakers/developers before you can enter a program. Also, if you are adding a speaker/developer that you have not previously used in a program you will need to add them before entering your program.

a. On the toolbar, click “Speakers/Developers”
b. Enter the required information shown in RED. **IMPORTANT:** Please do not list “junk” data such as ‘unknown’, ‘n/a’, or ‘tbd’.
    i. First Name, Last Name, Employer, Present Title
    ii. Current Responsibilities
    iii. Pertinent Qualifying Experience
c. Click “Save Changes”
d. You will then be prompted for the speakers/developers academic history. Please do not use abbreviations (instead of using BS, use Bachelors of Science) or junk data.
    i. Academic History
        1. Institution
        2. Degree
        3. Major
        4. Year of Graduation
e. Click “Save Academic History”
f. **IMPORTANT:** Repeat this step for any speakers/developers you will be using. The speaker information is an important part of the review process and if this information is not completed correctly, your program may be denied.

XI. How do I add a program site for an In-Person Program? (**Note:** The initial site should be added when you submit your program for review. Also, all program sites must be entered prior to the date in which they will be held).

a. Only the initial program site can be added before a program is approved. After a program is approved, additional sites can be added. **ALL** sites need to be registered with NAB as each site will have its own unique approval number. For those sites not registered with NAB, NO CEUs may be issued. All additional sites and/or dates must be registered with NAB prior to the day they are held, as no retroactive approval is issued.
b. Click on Program Sites – Only programs that are eligible to have sites added will show up. Choose a program and click “site history”.
    i. If you have previously entered a site, a list of sites will show up, if you are entering a site for the first time, the area will be blank.
c. Click on Add Site – You will have to enter the required information (Site Name, Location, Address, City, State and Zip). After you have added the necessary information click on “Save Site.”
    i. The “Initial” site is included in the program fee.
    ii. “Additional” sites with be charged $8/each
    iii. If you will be entering a registration website on either the “initial” or “additional” sites, $8/per entered link will be charged.
d. If payment is required, you will be prompted for the additional payment.

XII. How do I add a specific date/time for a Teleconference or Audio and Video Conference?

a. Click on Program Sites – Only programs that are eligible to have dates added will show up. Choose a program and click “site history”.
b. If you have previously entered a date, a list of dates will show up, if you are entering a date for the first time, the area will be blank.

c. Click on Add Site – You will have to enter the required information (Site Name, Date and Start and End Time). After you have added the necessary information click on "Save Site."
   i. There is not an additional fees for dates for Teleconference or Audio and Video Conference, the date information is used so that prospective attendees know the date of your program.

XIII. How do I renew an expired approved program?

a. After you have logged into the system, under "Program Summary" click on "Expired" in the drop down menu. All programs currently expired or due to expire within 90 days will be listed. You will now be able to renew a program that is set to expire further then 90 days out.
b. Next to the program you want to renew, click on "Renew." You will have two options:
   i. I want to edit this program – You will only be able to change the title and the speakers. You will be unable to change anything else. If you wish to edit the content, you will need to enter the program in as a new program.
   ii. I want to submit a renewal payment – No Changes can be made
   iii. **NOTE**: If you are renewing a program that was previously created in the old NCERS System, you will need to go through the program creation process, and enter the information that was not previously required to complete the renewal process. **NOTE:** All programs that were created in the old NCERS System were brought over with the intended audience of NHA and RCAL. Please be sure to update the intended audience on Step 1 of your renewal. If you are indicating that a program is for both NHA **AND** RCAL, you must select at least one NHA Domain of Practice and one RCAL Domain of Practice for each session within a program. For example, if part of your program applies to NHA **AND** RCAL and part only applies to one specific audience, either NHA and/or RCAL, you must submit this as separate programs, one program being the sessions that apply to both NHA **AND** RCAL and one program with the sessions that apply only to NHA and/or RCAL.
c. Once you have selected one of the options above, you will be required to enter the payment information. Once you payment is confirmed by the NCERS Coordinator, you will receive an updated approval number.

XIV. I need a receipt for my recent transaction - There is a "Payment History" Report for sponsors to use. To run the report, click on Reports → Load Report → Run Report. You will see a list of all transactions that have been made. **Please note**, the NCERS System is not an accounting based system. We don't generate invoices or store payment information (credit card type, numbers or expiration dates) for security purposes.