

# Class Management & Documentation Workflow



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# How to Document a Classroom Only Training

# Sign In to My Account

Go to [www.crisisprevention.com](http://www.crisisprevention.com)

1. Click on **“My Account”** in the upper right corner

Sign in to your account



Introducing Reframing Behavior – Now Available →

## De-escalation training solutions. Customized to your organizational needs.

Join more than 42,000 Certified Instructors and 17 million trained professionals  
creating safer workplaces worldwide.

Let's Get Started →



# Dashboard

After signing in to your account, you will see the **Dashboard**

1. On the top panel, click on “**Classes**”

**CRISIS PREVENTION INSTITUTE**

**Norman TEST\_NCI3\_US**  
ID: 8401177

**13** Classes this cert cycle  
11 TOTAL

**95** Hours this cert cycle  
75 TOTAL

**51** Participants this cert cycle  
44 TOTAL

### My Certification

Nonviolent Crisis Intervention®  
includes Verbal Intervention™

**ACTIVE** May 30, 2024 - May 30, 2026

- Pay Annual Membership Fee  
Included with registration
- Complete Instructor Training  
Print your certificate >
- Document Classes  
Recommended 2 per year >

[Print ID Card](#)

### Training Center

**PLANNING & FACILITATION**

- [Instructor Guides & Presentations >](#)
- [Classroom Videos & Resources >](#)

**POST TRAINING**

- [Document Training >](#)

**MANAGE ALL TRAINING**

- [Instructor-Led Classes >](#)
- [Online Modules / Blended Classes >](#)
- [Instructor Management >](#)

[Explore Training Center](#)

### Order Materials

**ONLINE SEATS & WORKBOOKS**  
[View All Workbooks >](#)

[View All Products](#)

### Professional Development

- [Membership Benefits >](#)
- [Certification History >](#)
- [My Online Learning >](#)
- [Find Training Programs >](#)



# Create the Class

1. Click on the “+ Create Class” button

**CRISIS PREVENTION INSTITUTE**

EN >

Dashboard / Classes

Dashboard

TRAINING MY ORGANIZATION

- Training Materials
- Classes**
- Participants
- Instructor Management
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

## Classes

1 [+ Create Class](#)

**Active** Archived

18 Classes [View Prior CPI Learning History](#)

SEARCH CLASS NAME  [Go](#) SORT BY [Nearest Date](#)

[Show Filters](#)

- Test Class ABC** [1/1 RECORDED](#) [...](#)  
Nonviolent Crisis Intervention®  
Class Date: September 20, 2024  
Instructor: Norman TEST\_NCI3\_US  
TEST\_Ashley's Educators US
- Convert Class Test** [0/3 RECORDED](#) [...](#)  
Nonviolent Crisis Intervention®  
Class Date: September 18, 2024  
Instructor: Norman TEST\_NCI3\_US  
TEST\_Ashley's Educators US
- Initial - Classroom** [6/6 RECORDED](#) [...](#)  
Nonviolent Crisis Intervention®  
Class Date: September 09, 2024, September 10, 2024  
Instructor: Norman TEST\_NCI3\_US, Annie TEST\_APS3\_ASD\_US  
TEST\_Ashley's Educators US



# Create the Class

1. Enter a name for your class
2. Select the name of the **Primary Instructor** from the drop-down list
3. If another instructor helped support this training, click “+ Add Instructor” and select their name from the drop-down list
  - If there were multiple co-instructors, click “+ Add Instructor” for each of them
4. Select the CPI program you trained
  - You will only see programs that you are certified to train

CRISIS PREVENTION INSTITUTE

EN >

Dashboard / Classes / View Class

Dashboard

TRAINING MY ORGANIZATION

- Training Materials
- Classes
- Participants
- Instructor Management
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

### New Class

#### Class Details

CLASS NAME\* **1**

PRIMARY INSTRUCTOR\* **2**

+ Add Instructor **3**

CPI PROGRAM\* **4**

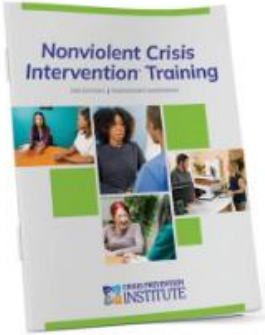
[Cancel](#) [Create Class](#)



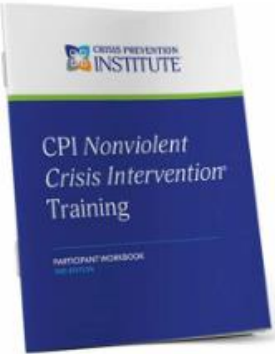
# Create the Class

1. Select which participant workbook you used
2. Select if there was any additional content
  - Selections are based on instructor qualifications
3. Select the type of training that was delivered
4. Enter the date of the class and the initial hours
  - If training was delivered over multiple days, click on **+ Another Day** to add additional dates and hours
5. Select how long the training is valid
  - This should align with your organization's policies and standards
  - CPI recommends a training be valid for 6-12 months

1 WHICH PARTICIPANT WORKBOOK ARE YOU USING?\*



3rd Edition



2nd Edition

2 ADDITIONAL CONTENT\*

None

3 TYPE OF TRAINING\*

Initial Training

4 DATE OF CLASS\* INITIAL HOURS\*

11/25/2024 0

+ Another Day

5 HOW LONG IS THIS TRAINING VALID?\*

6 Months

12 Months

Until Date

*i* Set this expiration date to align with your organization's policies and standards. CPI recommends 6 to 12 months.



# Create the Class

1. Select the “**Classroom Only**” training format
  - Select how the classroom portion was conducted
2. Select which physical skills participants learned
3. Click on “**Create Class**” to create the class

**1**

TRAINING FORMAT

Classroom Only

HOW WILL THE CLASSROOM TRAINING BE CONDUCTED?

In-Person  
 Virtual Meeting

Blended (Online Course + Classroom)

**2**

PARTICIPANTS WILL LEARN THE FOLLOWING PHYSICAL SKILLS

Disengagement Skills

- Block & Move
- Pull / Push
  - Wrist
  - Clothing
  - Hair
  - Neck
  - Body
- Bite
- Turning Away
- Hold & Stabilize
- Turning Away
- Lever
  - Wrist
  - Clothing
  - Hair
  - Neck
- Body
- Turning Away

Holding Skills

- Seated
  - Low-Level Restriction
  - Medium-Level Restriction
  - High-Level Restriction
- Standing
  - Low-Level Restriction
  - Medium-Level Restriction
  - High-Level Restriction
  - Team Control Position
- Children's Standing
  - Skills.Child-Stand-Low-Level-Restriction
  - Skills.Child-Stand-Medium-Level-Restriction
  - Skills.Child-Stand-High-Level-Restriction
- Children's Seated
  - Chair: Low-Level Restriction
  - Chair: Medium-Level Restriction
  - Chair: High-Level Restriction

× Cancel

**3** Create Class



# Create the Class

In each class you can add notes

1. Select either **“Class Details”** or **“Participants”**
2. Click on the **“Class Notes”** button in the upper right-hand corner
3. A box will appear where notes can be placed
4. Click **“Save Notes”** to save your information

The screenshot displays the 'Test Class 1 - Classroom' interface. On the left is a navigation sidebar with sections: 'Dashboard', 'TRAINING MY ORGANIZATION' (Training Materials, Classes, Participants), 'MY TRAINING' (My Online Learning, Certification History, Membership, Professional Enrichment, Community), and 'SUPPORT' (Profile, Order History, Contact Us, Sign Out). The main content area shows the class details for 'Test Class 1 - Classroom' on 7/11/2022. The 'Class Details' tab is selected, indicated by a circled '1'. A 'Class Notes' button in the top right is circled '2'. Below the class details, two workbook options are shown: '3rd Edition' and '2nd Edition'. A 'Class Notes' modal window is open, with its title bar circled '3'. The modal contains a 'NOTES' text area and a 'Save Notes' button at the bottom right, which is circled '4'. A 'Cancel' button is also visible in the bottom left of the modal.



# Add Participants

After your class has been created, you will be directed to enter your participants

You can add participants two different ways:

1. You can add participants individually
2. You can import a file that provides participant information

**Test Class 1 - Classroom** 7/11/2024 [Class Notes](#)

**Class Details** Participants

0 Participants

**1** Add Participant **2** Import Using A File Export List

Name	Blue Card ID	Status
------	--------------	--------

**Your class is empty!**  
Let's add participants to this class.

**1** Add Participant



# Add Participants Individually

On the Add Participant screen, you will see a list of all participants previously trained within your organization

1. To add participants previously trained you can:
  - Search by their name, email or external ID
  - Scroll to find each participant's name
2. Click on **“Add to Class”** to add that participant to the class
3. If all participants have been added, click **“Done”**

Otherwise, you can create new participants (see next slide)

The screenshot shows the 'Add Participant' interface. At the top, there is a search bar labeled 'SEARCH-NAME-EMAIL-EXTERNALID' and a 'SORT BY' dropdown menu set to 'Date Added'. A 'Create Participant' button is located to the right of the search bar. Below the search bar is a table with the following columns: Name, Email, Organization, External ID, and Status. The table contains one entry for 'Kyle Cooke' with email 'kcooke@cpiorg.com' and organization 'TEST\_Ashley's Educators US'. An 'Add to Class' button is positioned to the left of the first row. At the bottom left, there is a pagination control showing '10' and 'Showing 1 - 1 of 1'. At the bottom right, there is a 'Done' button.

Name	Email	Organization	External ID	Status
Kyle Cooke	kcooke@cpiorg.com	TEST_Ashley's Educators US		



# Add Participants Individually

1. If you need to add a new participant or if a participant is not listed, click on **“Create Participant”**
2. Enter the participant’s first name, last name and select your organization
3. Click on **“Create & Enroll Participant”** to add the participant to the class
4. Once all participants are enrolled, click on **“Done”**

The screenshot shows the 'Add Participant' interface. At the top right is a close button (X). Below the title is a search bar labeled 'SEARCH-NAME-EMAIL-EXTERNALID' and a 'SORT BY' dropdown menu set to 'Date Added'. A 'Create Participant' button is highlighted with a circled '1'. Below this is a 'Create Participant' sub-form with fields for 'FIRST NAME\*', 'LAST NAME\*', 'EMAIL (Optional)', 'ORGANIZATION\*' (a dropdown menu with 'Select' visible), and 'EXTERNAL ID (Optional)'. A circled '2' points to the first and last name fields. A 'Create & Enroll Participant' button is highlighted with a circled '3'. Below the form is a table with columns: Name, Email, Organization, External ID, and Status. The table contains one entry for 'Kyle Cooke' with email 'kcooke@cpiorg.com' and organization 'TEST\_Ashley's Educators US'. An 'Add to Class' button is next to the entry. At the bottom left, there is a 'Showing 1 - 1 of 1' indicator. A 'Done' button is highlighted with a circled '4' at the bottom right.



# Import Participants

1. To import a file, click on **“Import Using A File”**
2. Select your organization from the drop-down menu
3. If you have a file ready to import, click on **“Choose File”**
4. If needed, you can download a template that follows the preview format. Click on **“Download Template”**
  - When importing your file, make sure that it follows the format shown below in the preview
5. Once your file has been added, click on **“Import Participants”**

Test Class 3 - Blended 9/04/2024 Class Notes

Class Details Participants

0 Participants

Add Participant Import Using A File Export List

Name Blue Card ID Status

Your class is empty!  
Let's add participants to this class.

Add Participant

Import Using A File

Upload & Preview Participant List

ORGANIZATION\*

Choose File No file chosen

THINGS TO CHECK BEFORE YOU UPLOAD

- Does the first row of the file match the first row in the template?
- Is your list limited to 200 participants?
- Are all email addresses properly formatted, including an "@" symbol?
- Does your file have any duplicates?

Download Template

Preview

First Name	Last Name	Email (Optional)	External Id (Optional)	Blue Card ID (Optional)

Cancel Import Participants

# Enter Blue Card™ Numbers and Submit Your Training

1. The final step to document your training is to enter each participant's Blue Card™ ID number and select their pass/fail status
2. If you need to make a change to a participant, click on the box containing three dots to either:
  - View/Edit participant information
  - Submit an individual participant's training record
  - Remove the participant from the class
3. Once participant Blue Card™ ID numbers and pass/fail statuses have been entered, click "**Submit All Records**" to submit your class

The screenshot displays the 'Test Class 1 - Classroom' interface. At the top right, the date '7/11/2024' and a 'Class Notes' icon are visible. Below the title, there are two tabs: 'Class Details' and 'Participants', with 'Participants' being the active tab. A '1 Participants' indicator is shown. On the right side, there are three buttons: 'Add Participant', 'Import Using A File', and 'Export List'. A table lists the participants with columns for 'Name', 'Blue Card ID', and 'Status'. The first participant is 'Kyle Cooke' with email 'kcooke@cpiorg.com'. The 'Blue Card ID' field is empty, and the 'Status' is set to 'Pass'. A '100' dropdown menu is shown below the table, with the text 'Showing 1 - 1 of 1'. A 'Submit All Records' button is located at the bottom right of the interface. Three orange callouts are present: '1' points to the 'Blue Card ID' field, '2' points to the three-dot menu for the participant, and '3' points to the 'Submit All Records' button.

Test Class 1 - Classroom 7/11/2024 Class Notes

Class Details Participants

1 Participants Add Participant Import Using A File Export List

<input type="checkbox"/>	Name	Blue Card ID	Status	
<input type="checkbox"/>	Kyle Cooke kcooke@cpiorg.com		✓ Pass	⋮

100 Showing 1 - 1 of 1

3 Submit All Records



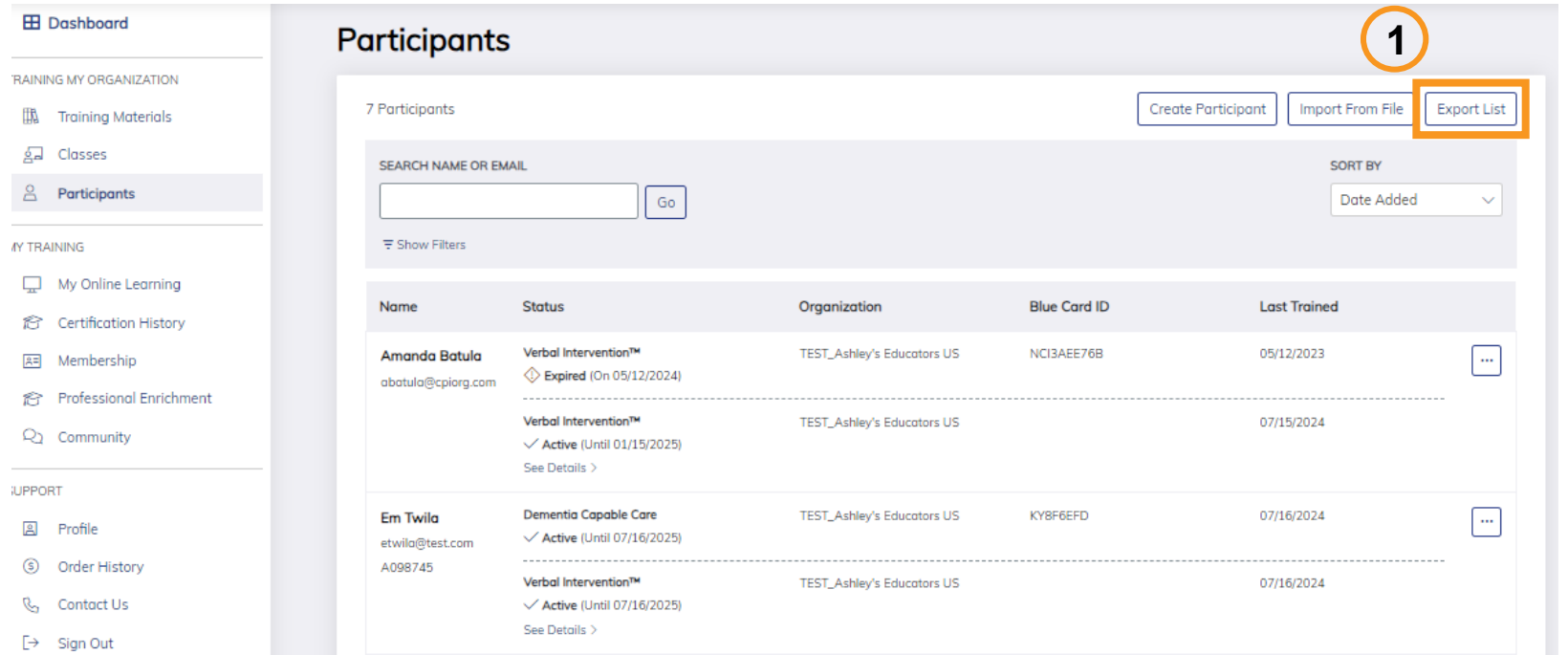
# Export Class Details (optional)

To receive detailed information on your classroom training, you can export a file

1. Click on “**Export List**”

An excel file will be downloaded that holds information containing:

- Name
- Email
- External ID
- Organization
- Course
- Status
- Blue Card ID
- Instructor
- Training Format
- Version
- Hours



The screenshot shows a web interface for managing participants. On the left is a navigation sidebar with categories: DASHBOARD, TRAINING MY ORGANIZATION (Training Materials, Classes, Participants), MY TRAINING (My Online Learning, Certification History, Membership, Professional Enrichment, Community), and SUPPORT (Profile, Order History, Contact Us, Sign Out). The main content area is titled 'Participants' and shows '7 Participants'. At the top right of this area are buttons for 'Create Participant', 'Import From File', and 'Export List' (highlighted with an orange box and a circled '1'). Below these buttons is a search bar labeled 'SEARCH NAME OR EMAIL' with a 'Go' button and a 'SORT BY' dropdown menu set to 'Date Added'. A 'Show Filters' link is also present. The main content is a table with columns: Name, Status, Organization, Blue Card ID, and Last Trained. Two participants are listed: Amanda Batula and Em Twila. Each participant row has a 'See Details >' link and a three-dot menu icon.

Name	Status	Organization	Blue Card ID	Last Trained
Amanda Batula abatula@cpiorg.com	Verbal Intervention™ ⚠ Expired (On 05/12/2024)	TEST_Ashley's Educators US	NC13AEE76B	05/12/2023
	Verbal Intervention™ ✓ Active (Until 01/15/2025) See Details >	TEST_Ashley's Educators US		07/15/2024
Em Twila etwila@test.com A098745	Dementia Capable Care ✓ Active (Until 07/16/2025)	TEST_Ashley's Educators US	KY8F6EFD	07/16/2024
	Verbal Intervention™ ✓ Active (Until 07/16/2025) See Details >	TEST_Ashley's Educators US		07/16/2024

\*Note – the Excel file has two tabs, one with class information, the other with participant information



# Download/Print Documents

If needed, you can download and print:  
Verification Letters, Training Records and  
Certificates once the class is submitted

1. Select **“Classes”**
2. Select a class by clicking on its name
3. Select the document you wish to download/print

**1**

Dashboard

TRAINING MY ORGANIZATION

- Training Materials
- Classes**
- Participants
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

**Classes**

Active Archived

38 Classes

SEARCH CLASS NAME

Go

Show Filters

**Ashley's Test Class 9.11** **2**

Nonviolent Crisis Intervention®  
Class Date: September 11, 2024  
Instructor: Angel TEST\_APS3\_US  
TEST\_Ashley's Educators US

0/0 RECORDED

Ashley's Test Class

Prevention First™  
Class Date: September 11, 2024  
Instructor: Angel TEST\_APS3\_US  
TEST\_Ashley's Educators US

0/0 RECORDED

10 Convert Class Test

NCI™ with Advanced Physical Skills  
Class Date: September 06, 2024  
Instructor: Angel TEST\_APS3\_US  
TEST\_Ashley's Educators US

0/2 RECORDED

Classroom Only MD

8/02/2024 Class Notes

Training Documentation

In this training, 4/4 participants have been recorded.

**3**

Print Verification Letters Print Training Record View Certificates

Class Details Participants

4 Participants

Add Participant Import Using A File Export List

Name	Blue Card ID	Status	
Tammy Gregory	EN6AABF3	✓ Pass 08/02/2024	Edit
Bob Minion bminion@gru.com	NECC77CA	✓ Pass 08/02/2024	Edit
Stuart Minion sminion@gru.com	NCI34D92A9	✓ Pass 08/02/2024	Edit
Chandler Bing CBing@Friends.com	NEE4A389	✓ Pass 08/02/2024	Edit

100

Showing 1 - 4 of 4





# How to Create and Document a Blended Training



# Sign In to My Account

Go to [www.crisisprevention.com](http://www.crisisprevention.com)

1. Click on **“My Account”** in the upper right corner

Sign in to your account



Introducing Reframing Behavior – Now Available →

## De-escalation training solutions. Customized to your organizational needs.

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Let's Get Started →



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1. On the top panel, click on “**Classes**”

**CRISIS PREVENTION INSTITUTE**

**Norman TEST\_NCI3\_US**  
ID: 8401177

**13** Classes this cert cycle  
11 TOTAL

**95** Hours this cert cycle  
75 TOTAL

**51** Participants this cert cycle  
44 TOTAL

### My Certification

Nonviolent Crisis Intervention®  
includes Verbal Intervention™

**ACTIVE** May 30, 2024 - May 30, 2026

- Pay Annual Membership Fee  
Included with registration
- Complete Instructor Training  
Print your certificate >
- Document Classes  
Recommended 2 per year >

[Print ID Card](#)

### Training Center

**PLANNING & FACILITATION**

- [Instructor Guides & Presentations >](#)
- [Classroom Videos & Resources >](#)

**POST TRAINING**

- [Document Training >](#)

**MANAGE ALL TRAINING**

- [Instructor-Led Classes >](#)
- [Online Modules / Blended Classes >](#)
- [Instructor Management >](#)

[Explore Training Center](#)

### Order Materials

**ONLINE SEATS & WORKBOOKS**  
[View All Workbooks >](#)

[View All Products](#)

### Professional Development

- [Membership Benefits >](#)
- [Certification History >](#)
- [My Online Learning >](#)
- [Find Training Programs >](#)



# Create the Class

1. Click on the “+ Create Class” button



Dashboard / Classes

Dashboard

TRAINING MY ORGANIZATION

- Training Materials
- Classes**
- Participants
- Instructor Management
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

## Classes

1 [+ Create Class](#)

Active Archived

18 Classes [View Prior CPI Learning History](#)

SEARCH CLASS NAME  [Go](#) SORT BY [Nearest Date](#)

Show Filters

<input checked="" type="checkbox"/>	<b>Test Class ABC</b> Nonviolent Crisis Intervention® Class Date: September 20, 2024 Instructor: Norman TEST_NCI3_US TEST_Ashley's Educators US	1/1 RECORDED <a href="#">...</a>
<input type="checkbox"/>	<b>Convert Class Test</b> Nonviolent Crisis Intervention® Class Date: September 18, 2024 Instructor: Norman TEST_NCI3_US TEST_Ashley's Educators US	0/3 RECORDED <a href="#">...</a>
<input checked="" type="checkbox"/>	<b>Initial - Classroom</b> Nonviolent Crisis Intervention® Class Date: September 09, 2024, September 10, 2024 Instructor: Norman TEST_NCI3_US, Annie TEST_APS3_ASD_US TEST_Ashley's Educators US	6/6 RECORDED <a href="#">...</a>



# Create the Class

1. Enter a name for your class
2. Select the name of the **Primary Instructor** from the drop-down list
3. If another instructor helped support this training, click “+ Add Instructor” and select their name from the drop-down list
  - If there were multiple co-instructors, click “+ Add Instructor” for each of them
4. Select the CPI program you trained
  - You will only see programs that you are certified to train

CRISIS PREVENTION INSTITUTE

EN >

Dashboard / Classes / View Class

Dashboard

TRAINING MY ORGANIZATION

- Training Materials
- Classes
- Participants
- Instructor Management
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

### New Class

#### Class Details

CLASS NAME\* **1**

PRIMARY INSTRUCTOR\* **2**

+ Add Instructor **3**

CPI PROGRAM\* **4**

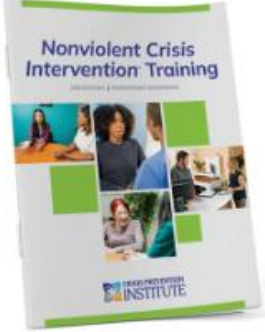
[Cancel](#) [Create Class](#)



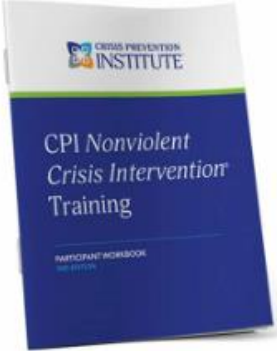
# Create the Class

1. Select which participant workbook you used
2. Select if there was any additional content
  - Selections are based on instructor qualifications
3. Select the type of training that was delivered
4. Enter the date of the class and the initial hours
  - If training was delivered over multiple days, click on **+ Another Day** to add additional dates and hours
5. Select how long the training is valid
  - This should align with your organization's policies and standards
  - CPI recommends a training be valid for 6-12 months

1 WHICH PARTICIPANT WORKBOOK ARE YOU USING?\*



3rd Edition



2nd Edition

2 ADDITIONAL CONTENT\*

None

3 TYPE OF TRAINING\*

Initial Training

4 DATE OF CLASS\* INITIAL HOURS\*

11/25/2024 0

+ Another Day

5 HOW LONG IS THIS TRAINING VALID?\*

6 Months

12 Months

Until Date

*i* Set this expiration date to align with your organization's policies and standards. CPI recommends 6 to 12 months.



# Create the Class

1. Select the “**Blended (Online Course + Classroom)**” training format
2. Select which Learning Management System will be used\*
  - Your company’s LMS
  - CPI’s LMS
3. Select how the classroom portion will be conducted

The screenshot shows a form with three sections, each highlighted with an orange box and a numbered callout:

- 1** TRAINING FORMAT
  - Classroom Only
  - Blended (Online Course + Classroom)
- 2** WHAT LEARNING MANAGEMENT SYSTEM (LMS) WILL BE USED TO DELIVER THE ONLINE TRAINING?
  - My Company's LMS
  - CPI LMS
- 3** HOW WILL THE CLASSROOM PORTION BE CONDUCTED?
  - In-Person
  - Virtual Meeting

\*Note – “My Company’s LMS” option will only appear if your organization has its own LMS



# Create the Class

1. If you are using CPI's LMS, you will be prompted to select the following:
  - Online course language
  - Which organization the seats should be used from

TRAINING FORMAT

Classroom Only

Blended (Online Course + Classroom)

WHAT LEARNING MANAGEMENT SYSTEM (LMS) WILL BE USED TO DELIVER THE ONLINE TRAINING?

My Company's LMS

CPI LMS

HOW WILL THE CLASSROOM PORTION BE CONDUCTED?

In-Person

Virtual Meeting


ONLINE COURSE LANGUAGE\*

Select ▼

WHICH ORGANIZATION SHOULD SEATS BE USED FROM?\*

Select ▼

**1**



# Create the Class

- 1. Select which physical skills participants will learn
- 2. Click on “**Create Class**” to create the class

**1** PARTICIPANTS WILL LEARN THE FOLLOWING PHYSICAL SKILLS

Disengagement

- Block Move
- Lever
  - Wrist
  - Clothing
  - Hair
  - Neck
- Body
- Turning Away
- Turning Away
- Pull / Push
  - Wrist
  - Clothing
  - Hair
  - Neck
  - Body
- Bite
- Turning Away

**2**



# Create the Class

In each class you can add notes

1. Select either **“Class Details”** or **“Participants”**
2. Click on the **“Class Notes”** button in the upper right-hand corner
3. A box will appear where notes can be placed
4. Click **“Save Notes”** to save your information

The screenshot displays the 'Test Class 1 - Classroom' interface. On the left is a navigation sidebar with sections: 'Dashboard', 'TRAINING MY ORGANIZATION' (Training Materials, Classes, Participants), 'MY TRAINING' (My Online Learning, Certification History, Membership, Professional Enrichment, Community), and 'SUPPORT' (Profile, Order History, Contact Us, Sign Out). The main content area shows class details for 'Test Class 1 - Classroom' on 7/11/2022. The 'Class Details' tab is selected, indicated by a circled '1'. A 'Class Notes' button in the top right is circled '2'. Below the details, two workbook options are shown: '3rd Edition' and '2nd Edition'. A 'Class Notes' dialog box is open, with its title bar circled '3'. The dialog contains a 'NOTES' text area and a 'Save Notes' button circled '4' at the bottom right, along with a 'Cancel' button.



# Add Participants

After your class has been created, you will be directed to enter your participants

You can add participants two different ways:

1. You can add participants individually
2. You can import a file that provides participant information

The screenshot displays the 'Test Class 1 - Classroom' interface. At the top right, the date '7/11/2024' and a 'Class Notes' button are visible. The main content area has two tabs: 'Class Details' and 'Participants', with 'Participants' being the active tab. Below the tabs, it shows '0 Participants'. To the right of this text are three buttons: 'Add Participant' (circled with a '1'), 'Import Using A File' (circled with a '2'), and 'Export List'. Below these buttons is a table header with columns for 'Name', 'Blue Card ID', and 'Status'. The table body is empty. In the center of the page, there is a large icon of a classroom chair and the text 'Your class is empty! Let's add participants to this class.' Below this text is another 'Add Participant' button, also circled with a '1'.



# Add Participants Individually

On the Add Participant screen, you will see a list of all participants previously trained within your organization

1. To add participants previously trained you can:
  - Search by their name, email or external ID
    - External ID is related to an individual's company ID number
  - Scroll to find each participant's name
2. Click on **"Add to Class"** to add that participant to the class
3. If all participants have been added, click **"Done"**

Otherwise, you can create new participants (see next slide)

The screenshot shows the 'Add Participant' interface. At the top, there is a search bar labeled 'SEARCH-NAME-EMAIL-EXTERNALID' and a 'SORT BY' dropdown menu set to 'Date Added'. A 'Create Participant' button is located to the right. Below this is a table with columns: Name, Email, Organization, External ID, and Status. The table contains one entry for 'Kyle Cooke' with email 'kcooke@cpiorg.com' and organization 'TEST\_Ashley's Educators US'. An 'Add to Class' button is positioned to the left of the first row. At the bottom left, there is a pagination control showing '10' and 'Showing 1 - 1 of 1'. At the bottom right, there is a 'Done' button. Three orange callout boxes with numbers 1, 2, and 3 are overlaid on the image, pointing to the search bar, the 'Add to Class' button, and the 'Done' button respectively.

Name	Email	Organization	External ID	Status
Kyle Cooke	kcooke@cpiorg.com	TEST_Ashley's Educators US		



# Add Participants Individually

1. If you need to add a new participant or if a participant is not listed, click on **“Create Participant”**
2. Enter the participant’s first name, last name, email and select your organization
3. Click on **“Create & Enroll Participant”** to add the participant to the class
4. Once all participants are enrolled, click on **“Done”**

**Add Participant** ×

SEARCH NAME, EMAIL, OR EXTERNAL ID SORT BY 1 Date Added ▼

**Create Participant**

**Create Participant**

FIRST NAME\*  LAST NAME\*  EMAIL\*  ORGANIZATION\* TEST\_Ashley's Educators US ▼ EXTERNAL ID (Optional)

× Cancel **3** **Create & Enroll Participant**

	Name	Email	Organization	External ID	Status
<b>Add to Class</b>	Theodore Chipmunk III	Theodore@aol.com	TEST_Ashley's Educators US	TC-FL-32	
<b>Add to Class</b>	Simon Ryan Chipmunk	Simon@aol.com	TEST_Ashley's Educators US	SI-MA-42	
<b>Add to Class</b>	Alvin Chipmunk	Alvin@aol.com	TEST_Ashley's Educators US	AL-SC-56	
<b>Add to Class</b>	Keeley Jones	Keel@aol.com	TEST_Ashley's Educators US	FFF-333	
<b>Add to Class</b>	Rebecca Welton	reb@aol.com	TEST_Ashley's Educators US	reb-232	
<b>Add to Class</b>	Ted Lasso	tlasso@aol.com	TEST_Ashley's Educators US	ted--fff	

10 ▼ 1 2 3 4 5 63 ...

Showing 1 - 10 of 623

**4** **Done**



# Import Participants

1. To import a file, click on **“Import Using A File”**
2. Select your organization from the drop-down menu
3. If you have a file ready to import, click on **“Choose File”**
4. If needed, you can download a template that follows the preview format. Click on **“Download Template”**
  - When importing your file, make sure that it follows the format shown below in the preview
5. Once your file has been added, click on **“Import Participants”**

Test Class 3 - Blended 9/04/2024 Class Notes

Class Details Participants

0 Participants

Add Participant **Import Using A File** Export List

Name	Blue Card ID	Status
------	--------------	--------

Your class is empty!  
Let's add participants to this class.

Add Participant

Import Using A File

Upload & Preview Participants List

ORGANIZATION\*  
TEST\_Ashley's Educators US

Choose File No file chosen

THINGS TO CHECK BEFORE YOU UPLOAD

- Does the first row of the file match the first row in the template?
- Is your list limited to 200 participants?
- Are all email addresses properly formatted, including an "@" symbol?
- Does your file have any duplicates?

Download Template

Preview

First Name	Last Name	Email	External Id (Optional)	Blue Card ID (Optional)

Cancel

**Import Participants**



# Add Participants

- **Note:** When participants are added to a blended class, they immediately receive an email that contains a link to their online modules
- Once a participant opens the module, they have 90 days to complete it

**From:** CPI Learning <[noreply@cpilearning.com](mailto:noreply@cpilearning.com)>

**Sent:** Tuesday, February 6, 2024 12:05 PM

**To:** Lynn Allen <[Lallen@CrisisPrevention.com](mailto:Lallen@CrisisPrevention.com)>

**Subject:** CPI Online Training Access

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.



Dear Lynn,

This online training is a prerequisite to your upcoming training event and must be completed prior to attending your session.

[Start your online training](#)

*Note: This link should not be shared with others; it is unique to you.*

Sincerely,

Your CPI Team

This mailbox is not monitored; you will not get a response if you reply to this email.  
Please do not use a mobile device to view your online training.



# How to View Online Module Completion Status

1. You can view the status of participant's online module completion at any time by clicking on **"Participants"**
2. Progress will be shown under **"Online Course"**
  - Online module progress will show after participants complete the first module

Test2 Blended 7/24/2024 Class Notes

Class Details **Participants** 1

6 Participants Add Participant Import Using A File Export List

Name	Online Course	Blue Card ID	Status	
Beverly Crusher bcrusher@starfleet.gov	Not Started	VI3275EB87	✓ Pass 07/24/2024	Edit ...
William Riker wriker@starfleet.gov	Not Started	MP057930	✓ Pass 07/24/2024	Edit ...
Missy Moo mmoo@starfleet.gov	Not Started	NCCC3066	✓ Pass 07/24/2024	Edit ...
Marco Polo mpolo@starfleet.gov	Not Started	SI77D146	✓ Pass 07/24/2024	Edit ...
Deanna Troi dtroi@starfleet.gov	Not Started	NE4287E9	✓ Pass 07/24/2024	Edit ...
Jean-Luc Picard jpicard@starfleet.gov	Not Started	MP9AF656	✓ Pass 07/24/2024	Edit ...

100 Showing 1 - 6 of 6



# Enter Blue Card™ Numbers and Submit Your Training

Before entering Blue Card numbers, you need to locate the blended class you have entered

1. Locate the class you have entered and click on the name of the class

The screenshot displays the 'Classes' management interface. On the left is a navigation sidebar with sections: 'TRAINING MY ORGANIZATION' (Training Materials, Classes, Participants, Dashboard.ViewSeats), 'MY TRAINING' (My Online Learning, Certification History, Membership, Professional Enrichment, Community), and 'SUPPORT' (Profile, Order History, Contact Us, Sign Out). The main content area is titled 'Classes' and includes a '+ Create Class' button. It features tabs for 'Active' and 'Archived', with 'Active' selected. Below the tabs, it indicates '7 Classes' and provides a 'View Prior CPI Learning History' link. A search bar for 'SEARCH CLASS NAME' with a 'Go' button and a 'SORT BY' dropdown set to 'Nearest Date' are present. A 'Show Filters' link is also visible. The class list contains three entries:

- Safety Intervention Training July 2024** (highlighted with an orange box and a circled '1')  
Safety Intervention™ Foundation — Working with Adults  
Class Date: July 24, 2024  
Instructor: Emily TEST\_SIEC\_UK  
TEST\_ashley's Educators uK  
Progress: 0/1 RECORDED
- Initial - Blended**  
Safety Intervention™ Foundation — Working with Children and Young People  
Class Date: July 18, 2024  
Instructor: Emily TEST\_SIEC\_UK  
TEST\_Ashley's Educators UK  
Progress: 0/0 RECORDED
- Refresher - Blended**  
Safety Intervention™ Foundation — Working with Children and Young People  
Class Date: July 17, 2024  
Instructor: Emily TEST\_SIEC\_UK  
TEST\_Ashley's Educators UK  
Progress: 0/0 RECORDED



# Enter Blue Card™ Numbers and Submit Your Training

1. The final step to document your training is to enter each participant's Blue Card™ ID number and select their pass/fail status
2. If you need to make a change to a participant, click on the box containing three dots to either:
  - View/Edit participant information
  - Submit an individual participant's training record
  - Remove the participant from the class
3. Once participant Blue Card™ ID numbers and pass/fail statuses have been entered, click **“Submit All Records”** to submit your class

The screenshot displays the 'Test Class 1 - Classroom' interface. At the top right, the date '7/11/2024' and a 'Class Notes' icon are visible. Below the title, there are two tabs: 'Class Details' and 'Participants', with 'Participants' being the active tab. A '1 Participants' indicator is shown. On the right side, there are three buttons: 'Add Participant', 'Import Using A File', and 'Export List'. A table lists the participant 'Kyle Cooke' with a checkbox, name, email 'kcooke@cpiorg.com', a 'Blue Card ID' input field, and a 'Status' dropdown menu currently set to 'Pass'. A '100' dropdown and 'Showing 1 - 1 of 1' text are at the bottom left. A '3' in a circle highlights the 'Submit All Records' button at the bottom right. A '2' in a circle highlights the three-dot menu for the participant, which contains options: 'View/Edit Participant', 'Submit Training Record', and 'Remove from Class'. A '1' in a circle highlights the 'Blue Card ID' and 'Status' columns of the table.



# Export Class Details (optional)

To receive detailed information on your classroom training, you can export a file

1. Click on “**Export List**”

An excel file will be downloaded that holds information containing:

- Name
- Email
- External ID
- Organization
- Course
- Status
- Blue Card ID
- Instructor
- Training Format
- Version
- Hours

The screenshot shows a web interface for managing participants. On the left is a navigation sidebar with categories: TRAINING MY ORGANIZATION (Training Materials, Classes, Participants), MY TRAINING (My Online Learning, Certification History, Membership, Professional Enrichment, Community), and SUPPORT (Profile, Order History, Contact Us, Sign Out). The main content area is titled 'Participants' and shows 7 participants. At the top right of this area are buttons for 'Create Participant', 'Import From File', and 'Export List' (highlighted with an orange box and a circled '1'). Below these buttons is a search bar and a 'SORT BY' dropdown set to 'Date Added'. A table lists participants with columns for Name, Status, Organization, Blue Card ID, and Last Trained. Two participants are visible: Amanda Batula and Em Twila, each with two training entries.

Name	Status	Organization	Blue Card ID	Last Trained
Amanda Batula abatula@cpiorg.com	Verbal Intervention™ ⚠ Expired (On 05/12/2024)	TEST_Ashley's Educators US	NC13AEE76B	05/12/2023
	Verbal Intervention™ ✓ Active (Until 01/15/2025) See Details >	TEST_Ashley's Educators US		07/15/2024
Em Twila etwila@test.com A098745	Dementia Capable Care ✓ Active (Until 07/16/2025)	TEST_Ashley's Educators US	KY8F6EFD	07/16/2024
	Verbal Intervention™ ✓ Active (Until 07/16/2025) See Details >	TEST_Ashley's Educators US		07/16/2024

\*Note – the Excel file has two tabs, one with class information, the other with participant information



# Download/Print Documents

If needed, you can download and print:  
Verification Letters, Training Records and  
Certificates once the class is submitted

1. Select **“Classes”**
2. Select a class by clicking on its name
3. Select the document you wish to download/print

**1**

**2**

**Ashley's Test Class 9.11**  
Nonviolent Crisis Intervention®  
Class Date: September 11, 2024  
Instructor: Angel TEST\_APS3\_US  
TEST\_Ashley's Educators US

**3**

**Classroom Only MD** 8/02/2024 [Class Notes](#)

**Training Documentation**  
In this training, 4/4 participants have been recorded.

[Print Verification Letters](#) [Print Training Record](#) [View Certificates](#)


**Class Details** **Participants**

4 Participants [Add Participant](#) [Import Using A File](#) [Export List](#)

Name	Blue Card ID	Status	
Tammy Gregory	EN6AABF3	✓ Pass 08/02/2024	<a href="#">Edit</a> <a href="#">...</a>
Bob Minion bminion@gru.com	NECC77CA	✓ Pass 08/02/2024	<a href="#">Edit</a> <a href="#">...</a>
Stuart Minion sminion@gru.com	NCI34D92A9	✓ Pass 08/02/2024	<a href="#">Edit</a> <a href="#">...</a>
Chandler Bing CBing@Friends.com	NEE4A389	✓ Pass 08/02/2024	<a href="#">Edit</a> <a href="#">...</a>

100 [▼](#)  
Showing 1 - 4 of 4





# How to Move a Blended Class to the Class Management and Documentation Workflow



# Sign In to My Account

Go to [www.crisisprevention.com](http://www.crisisprevention.com)

1. Click on **“My Account”** on the upper right corner

Sign in to your account



Introducing Reframing Behavior – Now Available →

## De-escalation training solutions. Customized to your organizational needs.

Join more than 42,000 Certified Instructors and 17 million trained professionals  
creating safer workplaces worldwide.

Let's Get Started →



# Dashboard

After signing in to your account, you will see the **Dashboard**

1. On the top panel, click on “**Classes**”

**CRISIS PREVENTION INSTITUTE**

**Norman TEST\_NCI3\_US**  
ID: 8401177

**13** Classes this cert cycle  
11 TOTAL

**95** Hours this cert cycle  
75 TOTAL

**51** Participants this cert cycle  
44 TOTAL

### My Certification

Nonviolent Crisis Intervention®  
includes Verbal Intervention™

**ACTIVE** May 30, 2024 - May 30, 2026

- Pay Annual Membership Fee  
Included with registration
- Complete Instructor Training  
Print your certificate >
- Document Classes  
Recommended 2 per year >

Print ID Card

### Training Center

#### PLANNING & FACILITATION

- Instructor Guides & Presentations >
- Classroom Videos & Resources >

#### POST TRAINING

- Document Training >

#### MANAGE ALL TRAINING

- Instructor-Led Classes >
- Online Modules / Blended Classes >
- Instructor Management >

Explore Training Center

### Order Materials

ONLINE SEATS & WORKBOOKS  
View All Workbooks >

View All Products

### Professional Development

- Membership Benefits >
- Certification History >
- My Online Learning >
- Find Training Programs >



# Locate the Class to Move

Blended classes created prior to the introduction of the new Workflow (December 11, 2024) do not appear as an “Active” or “Archived” class. Instead, you must locate them from the “CPI Learning History” list and move them to the new Workflow.

1. Select “**View Prior CPI Learning History**”

The screenshot displays the 'Classes' management interface. On the left is a sidebar with navigation links: Dashboard, TRAINING MY ORGANIZATION (Training Materials, Classes, Participants), MY TRAINING (My Online Learning, Certification History, Membership, Professional Enrichment, Community), and SUPPORT (Profile, Order History, Contact Us, Sign Out). The main area is titled 'Classes' and includes a '+ Create Class' button. It features tabs for 'Active' and 'Archived', with 'Archived' selected. A 'View Prior CPI Learning History' button is highlighted with an orange box and a circled '1'. Below this are search and filter options, and a list of two classes: 'Emergency Room Training' and 'Test Class 3', each with a '0/2 RECORDED' status and a menu icon.



# Locate the Class to Move

1. Once you've located the class you want to move, select the **"Document Class"** button
2. Ensure the date of the class is correct, add the initial training and refresher hours
3. If the class was more than one day, click on **" + Another Day "** to add additional dates
4. Click on **"Update Class"**

**Manage Classes**

Search...

Class Name	Course Name	Instructor	Date Created	Date of In-Person Training	Enrolled Learners	
<a href="#">MC DCC - 1</a>	Crisis Prevention Institute: Dementia ...	Doris TEST_DCC_US	21 Nov 2024		1	<b>1</b> <b>Document Class</b>
<a href="#">MC DCC - 20</a>	Crisis Prevention Institute: Dementia ...	Doris TEST_DCC_US	21 Nov 2024		20	<b>Document Class</b>
<a href="#">MC DCC - 2</a>	Crisis Prevention Institute: Dementia ...	Doris TEST_DCC_US	21 Nov 2024		2	<b>Document Class</b>
<a href="#">MC DCC - 2</a>	Crisis Prevention Institute: Dementia ...	Doris TEST_DCC_US	21 Nov 2024		2	<b>Document Class</b>
<a href="#">MC CC - 2</a>	Classroom Culture					
<a href="#">MC CC - 3</a>	Classroom Culture					
<a href="#">MC CC - 2</a>	Classroom Culture					
<a href="#">MC VI3 - 3</a>	Verbal Intervention 3rd Edition					
<a href="#">MC VI3 - 1</a>	Verbal Intervention 3rd Edition					

10 Showing 1 - 10 of 33

### Additional Class Details

In order to complete the documentation for this class, we need a bit more information. Could you select the program you were training?

**2**

**DATE OF CLASS\*** **INITIAL HOURS\*** **REFRESHER HOURS\***

11/25/2024 0 0

**3** **+ Another Day**

**4** **Update Class**

**1** **Document Class**

Enter the number of hours each group is attending for the day. If not attending that day, enter 0

**1**



# Move the Class

1. When collecting additional class details, you may be asked to select the **exact** program you delivered
  - For example, if you taught Nonviolent Crisis Intervention, you will be prompted to select the program type with any specialty topics
2. Once you select the program, be sure to enter the date of the class, initial hours and any refresher hours
3. Make sure to click **“Update Class”**

### Additional Class Details

In order to complete the documentation for this class, we need a bit more information. Could you select the program you were training?

Nonviolent Crisis Intervention®, 3rd Edition, Positive Behavioral Interventions and Support

NCI™ With Advanced Physical Skills, 3rd Edition, Positive Behavioral Interventions and Support

NCI™ With Advanced Physical Skills, 3rd Edition

Nonviolent Crisis Intervention®, 3rd Edition

DATE OF CLASS*	INITIAL HOURS*	REFRESHER HOURS*
11/25/2024	3	0

[+ Another Day](#)

[× Cancel](#)

[Update Class](#)



# Move the Class

Once converted, you cannot make changes to the following items:

- Primary Instructor
- Class Name
- Participant Workbook
- Training Format

## TRAINING FORMAT

Blended (Online Course + Classroom)

### HOW WILL THE CLASSROOM PORTION BE CONDUCTED?

In-Person

### ONLINE COURSE LANGUAGE

English

### WHAT INDUSTRY SHOULD THE EXAMPLES SHOW?

HE

### WHICH ORGANIZATION SHOULD SEATS BE USED FROM?

TEST\_Ashley's Healthcare US (12 seats available)

## Class Details Participants

### CLASS NAME\*

mjm Classroom only class #1

### PRIMARY INSTRUCTOR\*

Angel TEST\_APS3\_US

### ADDITIONAL INSTRUCTOR\*

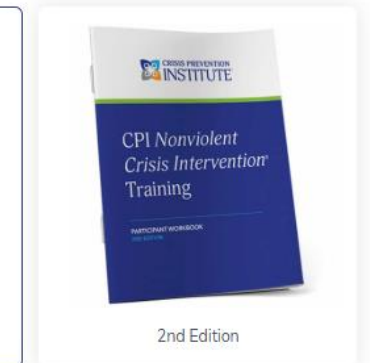
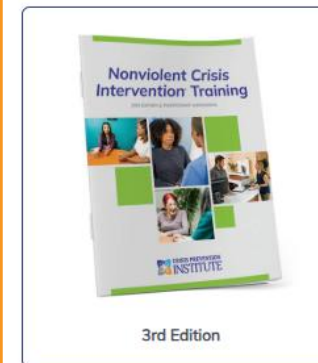
Ashley TEST\_APS3\_MH\_US

+ Add Instructor

### CPI PROGRAM

Nonviolent Crisis Intervention®

### WHICH PARTICIPANT WORKBOOK ARE YOU USING?



# Move the Class

1. Select the Physical Skills that were used in the class
2. Make sure to click **“Save Changes”**

1

PARTICIPANTS WILL LEARN THE FOLLOWING PHYSICAL SKILLS

**Disengagement Skills**

Strike

Pull / Push

Wrist

Clothing

Hair

Neck

Body

Bite

Hold & Stabilize

Wrist

Clothing

Hair

Neck

Body

Bite

Lever

Wrist

Clothing

Hair

Neck

Body

**Holding Skills**

Seated

Low-Level Restriction

Medium-Level Restriction

High-Level Restriction

Standing

Low-Level Restriction

Medium-Level Restriction

High-Level Restriction

Team Control Position

Children's Standing

Low-Level Restriction

Medium-Level Restriction

High-Level Restriction

Children's Seated

Chair: Low-Level Restriction

Chair: Medium-Level Restriction

Chair: High-Level Restriction

× Cancel

2 Save Changes



# Move the Class

1. You will now need to enter each participant's Blue Card ID, their pass/fail status and the type of training (initial or refresher)
2. Click on the ellipses if you need to
  - View/edit a participant
  - Submit their training record
  - Re-send the enrollment email
  - Remove them from the class
3. Select "Submit All Records"

The screenshot displays the 'MC NCI3 - 2' class management interface. At the top right, the date '11/26/2024' and a 'Class Notes' button are visible. The main content area is divided into 'Class Details' and 'Participants' tabs. Under the 'Participants' tab, there are buttons for 'Add Participant', 'Import Using A File', and 'Export List'. A table lists two participants, both 'US TestUser' with email addresses 'ncl\_testuser\_5@ae.us' and 'ncl\_testuser\_4@ae.us'. Each row includes a checkbox, a progress bar (0%), a 'Blue Card ID' input field, a 'Status' dropdown (set to 'Pass'), and a 'Type' dropdown (set to 'Initial'). A circled '1' highlights the 'Blue Card ID' column header. A circled '2' highlights the ellipsis menu icon for the first participant, which is open to show options: 'View/Edit Participant', 'Submit Training Record', 'Re-send Enrollment Email', and 'Remove from Class'. A circled '3' highlights the 'Submit All Records' button at the bottom right. A pagination control shows '100' and 'Showing 1 - 2 of 2'.





# Class Administration and Reporting

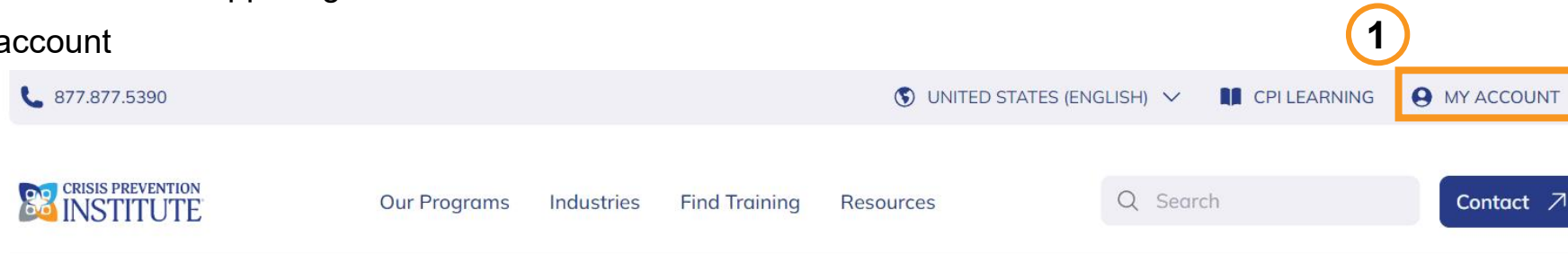


# Sign In to My Account

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1. Click on **“My Account”** in the upper right corner

Sign in to your account



Introducing Reframing Behavior – Now Available →

## De-escalation training solutions. Customized to your organizational needs.

Join more than 42,000 Certified Instructors and 17 million trained professionals  
creating safer workplaces worldwide.

Let's Get Started →



# Dashboard

After signing in to your account, you will see the **Dashboard**

- 1. On the top panel, click on **“Classes”**

The dashboard for user Norman TEST\_NCI3\_US (ID: 8401177) features a top navigation bar with a shopping cart and menu icon. The main content area is divided into several sections:

- My Certification:** Shows 'Nonviolent Crisis Intervention®' (includes Verbal Intervention™) with an 'ACTIVE' status from May 30, 2024, to May 30, 2026. Tasks include 'Pay Annual Membership Fee' (included with registration), 'Complete Instructor Training' (print certificate), and 'Document Classes' (recommended 2 per year). A 'Print ID Card' button is also present.
- Training Center:** Divided into 'PLANNING & FACILITATION' (Instructor Guides & Presentations, Classroom Videos & Resources) and 'POST TRAINING' (Document Training). A 'MANAGE ALL TRAINING' section includes links for Instructor-Led Classes, Online Modules / Blended Classes, and Instructor Management. An 'Explore Training Center' button is at the bottom.
- Order Materials:** Features 'ONLINE SEATS & WORKBOOKS' with a 'View All Workbooks' link and a 'View All Products' button.
- Professional Development:** Includes links for Membership Benefits, Certification History, My Online Learning, and Find Training Programs.

Summary metrics at the top right show: 13 Classes this cert cycle (11 TOTAL), 95 Hours this cert cycle (75 TOTAL), and 51 Participants this cert cycle (44 TOTAL). A red circle with the number '1' highlights the 'Classes' metric.



# Locate Active Classes

1. Active classes are automatically displayed
  - Active classes are those that have not reached their expiration date chosen at the time of class creation
2. Active classes display in date order, they can be sorted alphabetically as well

**Classes** + Create Class

19 Classes View Prior CPI Learning History ⓘ

SEARCH CLASS NAME  Go

2 SORT BY   
 Nearest Date

1 **Active** Archived

**Customer Care Training** 0/1 RECORDED ...  
Nonviolent Crisis Intervention®  
Class Date: November 25, 2024  
Instructor: Norman TEST\_NC13\_US  
TEST\_Ashley's Educators US

**Test Class ABC** 1/1 RECORDED ...  
Nonviolent Crisis Intervention®  
Class Date: September 20, 2024  
Instructor: Norman TEST\_NC13\_US  
TEST\_Ashley's Educators US

**Convert Class Test** 0/3 RECORDED ...  
Nonviolent Crisis Intervention®  
Class Date: September 18, 2024  
Instructor: Norman TEST\_NC13\_US  
TEST\_Ashley's Educators US



# Locate Archived Classes

1. Archived or expired classes will be shown here
  - Archived classes have surpassed their expiration date that was chosen during class creation
  - No edits or changes can be made to archived classes

The screenshot displays a web application interface for managing classes. On the left is a navigation sidebar with sections: 'Dashboard', 'TRAINING MY ORGANIZATION' (including Training Materials, Classes, Participants, Instructor Management, View Seats), 'MY TRAINING' (including My Online Learning, Certification History, Membership, Professional Enrichment, Community), and 'SUPPORT' (including Profile, Order History, Contact Us, Sign Out). The main content area is titled 'Classes' and features a '+ Create Class' button in the top right. Below the title, there are two tabs: 'Active' and 'Archived', with the 'Archived' tab selected and highlighted by an orange box. To the right of the 'Archived' tab is a circular badge containing the number '1'. Below the tabs, it indicates '1 Classes' and provides a 'View Prior CPI Learning History' link. A search bar labeled 'SEARCH CLASS NAME' with a 'Go' button and a 'SORT BY' dropdown menu (set to 'Nearest Date') are present. A 'Show Filters' link is also visible. The main class entry is for 'TEST Alex expired class', which includes details: 'Dementia Capable Care', 'Class Date: August 15, 2023', and 'Instructor: Doris TEST\_DCC\_US, TEST\_Ashley's Educators US'. A '1/1 RECORDED' badge and a menu icon are shown next to the class name. At the bottom, there is a pagination control showing '25' items per page and 'Showing 1 - 1 of 1'.



# Edit an Active Class

1. To make changes to an Active Class, click on the name of the class you would like to edit
  - Classes without a blue check mark are pending and have not been submitted

## Classes

+ Create Class

Active Archived

18 Classes

View Prior CPI Learning History

SEARCH CLASS NAME

Go

SORT BY

Nearest Date

Show Filters

<input checked="" type="checkbox"/>	<b>Test Class ABC</b>	1	1/1 RECORDED	...
	<b>Convert Class Test</b>		0/3 RECORDED	...
<input checked="" type="checkbox"/>	<b>Initial - Classroom</b>		6/6 RECORDED	...

**Test Class ABC**

1

Nonviolent Crisis Intervention®  
Class Date: September 20, 2024  
Instructor: Norman TEST\_NCI3\_US  
TEST\_Ashley's Educators US

1/1 RECORDED

...

**Convert Class Test**

Nonviolent Crisis Intervention®  
Class Date: September 18, 2024  
Instructor: Norman TEST\_NCI3\_US  
TEST\_Ashley's Educators US

0/3 RECORDED

...

**Initial - Classroom**

Nonviolent Crisis Intervention®  
Class Date: September 09, 2024, September 10, 2024  
Instructor: Norman TEST\_NCI3\_US, Annie TEST\_APS3\_ASD\_US  
TEST\_Ashley's Educators US

6/6 RECORDED

...

# Edit an Active Class

- To edit an active class, click on **“Class Details”**
  - You can make select changes to pending and submitted classes including:
    - Class name
    - Type of Training
    - Date of Class
    - Initial Hours
    - Physical Skills
    - Participants
- Make sure to click **“Save Changes”**

**Test Blended Course.9.6.24** 9/05/2024 Class Notes

**1** **Class Details** Participants

CLASS NAME\*  
Test Blended Course.9.6.24

PRIMARY INSTRUCTOR\*  
Doris TEST\_DCC\_US  
[+ Add Instructor](#)

CPI PROGRAM  
Dementia Capable Care

WHICH PARTICIPANT WORKBOOK ARE YOU USING?

2nd Edition

Foundation

Behaviors

Foundation & Behaviors

PARTICIPANTS WILL LEARN THE FOLLOWING PHYSICAL SKILLS

**Disengagement**

- Block & Move
- Turning Away
- Lever
- Pull / Push
- Wrist
- Body
- Clothing
- Turning Away
- Hair
- Wrist
- Neck
- Bite
- Turning Away
- Body

**Holding**

- Standing
- Seated
- Team Control Position
- Low-Level Restriction
- Medium-Level Restriction
- High-Level Restriction
- High-Level Restriction

× Cancel **2** **Save Changes**

# Add Participant(s) to an Active Class

1. If additional participants need to be added to a class, click **“Participants”**
2. Select **“Add Participant”** to enroll additional participants

The screenshot displays the LMS interface for a class titled "Test Blended Course.9.6.24". The left sidebar contains navigation menus for "TRAINING MY ORGANIZATION", "MY TRAINING", and "SUPPORT". The main content area shows the "Participants" tab selected, with a circled "1" next to it. Below the tab, there are three buttons: "Add Participant" (circled with a "2"), "Import Using A File", and "Export List". A table lists one participant, Hollie Hobbie, with a status of "Pass". A dropdown menu at the bottom shows "100" and "Showing 1 - 1 of 1".

**Dashboard**

TRAINING MY ORGANIZATION

- Training Materials
- Classes
- Participants
- Instructor Management
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

**Test Blended Course.9.6.24** 9/05/2024 [Class Notes](#)

**Class Details** **Participants** **1**

1 Participants

**2** [Add Participant](#) [Import Using A File](#) [Export List](#)

<input type="checkbox"/>	Name	Credential Number	Status	
<input type="checkbox"/>	Hollie Hobbie hhobbie@oe.us 123456	<input type="text"/>	✓ Pass	<a href="#">...</a>

100

Showing 1 - 1 of 1



# Modify Participant Information

- 1. To make modifications to an enrolled participant, click on the three dots and select “View/Edit Participant”

Test Blended Course.9.6.24 9/05/2024 [Class Notes](#)

**Class Details** Participants

1 Participants [Add Participant](#) [Import Using A File](#) [Export List](#)

<input type="checkbox"/>	Name	Credential Number	Status	
<input type="checkbox"/>	Hollie Hobbie hhobbie@ae.us 123456	<input type="text"/>	✓ Pass	<b>1</b> <span style="border: 2px solid orange; padding: 2px;">⋮ View/Edit Participant Submit Training Record Remove from Class</span>

100  Showing 1 - 1 of 1



# Modify Participant Information

1. Click on “**Edit Participant Info**”
2. Here, you will be able to edit the participant’s:
  - Name
  - Email
  - Organization
  - External ID
3. Click “**Save**” to save your changes

Participant Details ×

**Hollie Hobbie**  
TEST\_Ashley's Educators US  
123456

**FIRST NAME\***  
Hollie 2

**LAST NAME\***  
Hobbie

EMAIL (Optional)

**ORGANIZATION\***  
TEST\_Ashley's Educators US

EXTERNAL ID (Optional)  
123456

× Cancel 3 Save Participant

Participant Details ×

**Hollie Hobbie**  
TEST\_Ashley's Educators US  
123456

Edit Participant Info 1

**Nonviolent Crisis Intervention®**  
3rd Edition *In Progress* ⋮  
[+ Show Class Details](#)

**Dementia Capable Care**  
2nd Edition *In Progress* ⋮  
[+ Show Class Details](#)

**Nonviolent Crisis Intervention®**  
3rd Edition *In Progress* ⋮  
[+ Show Class Details](#)

Close



# Remove Participant(s) from an Active Class

1. If you need to remove a participant from a class, click on **“Participants”**
2. Click the ellipsis on the far right-hand side of the participant’s name
3. Click on **“Remove from Class”**

The screenshot shows the 'Test Blended Course.9.6.24' interface. At the top right, the date '9/05/2024' and a 'Class Notes' button are visible. The main content area has two tabs: 'Class Details' and 'Participants'. The 'Participants' tab is selected and highlighted with an orange box and a circled '1'. Below the tabs, it says '1 Participants' and there are three buttons: 'Add Participant', 'Import Using A File', and 'Export List'. A table lists the participants with columns for 'Name', 'Credential Number', and 'Status'. The first participant is 'Hollie Hobbie' with email 'hhobbie@ae.us' and ID '123456'. Her status is 'Pass'. To the right of her name is an ellipsis menu icon, highlighted with an orange box and a circled '2'. A dropdown menu is open, showing options: 'View/Edit Participant', 'Submit Training Record', and 'Remove from Class'. The 'Remove from Class' option is highlighted with an orange box and a circled '3'. At the bottom left, there is a dropdown menu showing '100' and the text 'Showing 1 - 1 of 1'.



# Download/Print Documents

If needed, you can download and print:  
Verification Letters, Training Records and  
Certificates

1. Select **“Classes”**
2. Select a class by clicking on its name
3. Select the document you wish to download/print

**1**

Dashboard

TRAINING MY ORGANIZATION

- Training Materials
- Classes**
- Participants
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

**Classes**

Active Archived

38 Classes

SEARCH CLASS NAME

Go

Show Filters

**3**

Classroom Only MD

8/02/2024 Class Notes

Training Documentation

In this training, 4/4 participants have been recorded.

Print Verification Letters Print Training Record View Certificates

Class Details Participants

4 Participants

Add Participant Import Using A File Export List

Name	Blue Card ID	Status	
Tammy Gregory	EN6AABF3	✓ Pass 08/02/2024	Edit
Bob Minion bminion@gru.com	NECC77CA	✓ Pass 08/02/2024	Edit
Stuart Minion sminion@gru.com	NCI34D92A9	✓ Pass 08/02/2024	Edit
Chandler Bing CBing@Friends.com	NEE4A389	✓ Pass 08/02/2024	Edit

100

Showing 1 - 4 of 4

**2**

Ashley's Test Class 9.11

Nonviolent Crisis Intervention®

Class Date: September 11, 2024

Instructor: Angel TEST\_APS3\_US

TEST\_Ashley's Educators US

0/0 RECORDED

Ashley's Test Class

Prevention First™

Class Date: September 11, 2024

Instructor: Angel TEST\_APS3\_US

TEST\_Ashley's Educators US

0/0 RECORDED

10 Convert Class Test

NCI™ with Advanced Physical Skills

Class Date: September 06, 2024

Instructor: Angel TEST\_APS3\_US

TEST\_Ashley's Educators US

0/2 RECORDED





# How to Transfer a Participant



# Sign In to My Account

Go to [www.crisisprevention.com](http://www.crisisprevention.com)

1. Click on **“My Account”** in the upper right corner

Sign in to your account



Introducing Reframing Behavior – Now Available →

## De-escalation training solutions. Customized to your organizational needs.

Join more than 42,000 Certified Instructors and 17 million trained professionals  
creating safer workplaces worldwide.

Let's Get Started →



# Dashboard

After signing in to your account, you will see the **Dashboard**

- 1. On the top panel, click on “**Classes**”

**CRISIS PREVENTION INSTITUTE**

**Norman TEST\_NCI3\_US**  
ID: 8401177

**13** Classes this cert cycle  
11 TOTAL

**95** Hours this cert cycle  
75 TOTAL

**51** Participants this cert cycle  
44 TOTAL

### My Certification

Nonviolent Crisis Intervention®  
includes Verbal Intervention™

**ACTIVE** May 30, 2024 - May 30, 2026

- Pay Annual Membership Fee  
Included with registration
- Complete Instructor Training  
Print your certificate >
- Document Classes  
Recommended 2 per year >

Print ID Card

### Training Center

**PLANNING & FACILITATION**

- Instructor Guides & Presentations >
- Classroom Videos & Resources >

**POST TRAINING**

- Document Training >

**MANAGE ALL TRAINING**

- Instructor-Led Classes >
- Online Modules / Blended Classes >
- Instructor Management >

Explore Training Center

### Order Materials

**ONLINE SEATS & WORKBOOKS**  
View All Workbooks >

View All Products

### Professional Development

- Membership Benefits >
- Certification History >
- My Online Learning >
- Find Training Programs >



# Locate the Class

1. Click into the class that you want to transfer participants from
  - Note: Participants can only be transferred from classes that have **not** been submitted

CRISIS PREVENTION INSTITUTE

Dashboard / Classes

Need Help?

Dashboard

TRAINING MY ORGANIZATION

- Training Materials
- Classes**
- Participants
- Instructor Management
- View Seats

MY TRAINING

- My Online Learning
- Certification History
- Membership
- Professional Enrichment
- Community

SUPPORT

- Profile
- Order History
- Contact Us
- Sign Out

## Classes

+ Create Class

Active Archived

40 Classes View Prior CPI Learning History ⓘ

SEARCH CLASS NAME  Go SORT BY Nearest Date

Show Filters

- Test Class ABC** 1/1 RECORDED ...  
Nonviolent Crisis Intervention®  
Class Date: September 20, 2024  
Instructor: Norman TEST\_NCI3\_US  
TEST\_Ashley's Educators US
- Convert Class Test** 0/2 RECORDED ...  
Nonviolent Crisis Intervention®  
Class Date: September 18, 2024  
Instructor: Norman TEST\_NCI3\_US  
TEST\_Ashley's Educators US
- Initial - Classroom** 6/6 RECORDED ...  
Nonviolent Crisis Intervention®  
Class Date: September 09, 2024, September 10, 2024  
Instructor: Norman TEST\_NCI3\_US, Annie TEST\_APS3\_ASD\_US  
TEST\_Ashley's Educators US




# Transfer a Participant

1. To transfer a participant to another class, click on the ellipses next to their name
2. Click **'Transfer to Another Class'**

**Convert Class Test** 9/18/2024 [Class Notes](#)

**Class Details** Participants

2 Participants [Add Participant](#) [Import Using A File](#) [Export List](#)

<input type="checkbox"/>	Name	Blue Card ID	Status	
<input type="checkbox"/>	<b>Angela Francis</b> Afrancis@cpi.com	<input type="text"/>	✓ Pass	<b>1</b> 
<input type="checkbox"/>	<b>Kimmy Gibbler</b> kgibbler@ae.us	<input type="text"/>	✓ Pass	

100  Showing 1 - 2 of 2

- View/Edit Participant
- Submit Training Record
- Re-send Enrollment Email
- 2** [Transfer to Another Class](#) (ETA)
- Remove from Class



# Transfer a Participant

1. If the participant has started the online modules, a box will appear asking if you would like to keep the participant's progress or have them start over/reset progress
2. You will also need to select which class you want to transfer the participant into
3. When ready, click **'Transfer Participant'**

**Transfer to Another Class** BETA ×

**Angela Francis**  
Currently Enrolled In: Convert Class Test

**ONLINE COURSE**

Keep current progress  
 Start over / reset progress

**SELECT A CLASS \***

Search... ▾

December 2, 2024 | Emily - Blended Training Test #1

November 18, 2024 | Rachel's Test Class

**1**

**2**

**3** **Transfer Participant**



# Transfer a Participant

1. Once you click 'Transfer Participant' a blue box will appear stating they were successfully transferred

The screenshot displays a web interface for managing a class. At the top, a blue notification box with a checkmark icon states: "Angela Francis was successfully transferred to Rachel's Test Class (September 18, 2024)." Below this, the main content area is titled "Convert Class Test" and includes a date "9/18/2024" and a "Class Notes" button. The interface is divided into two tabs: "Class Details" and "Participants", with the latter being the active tab. Under the "Participants" tab, it shows "1 Participants" and three buttons: "Add Participant", "Import Using A File", and "Export List". A table lists the participants with columns for "Name", "Blue Card ID", and "Status". The table contains one entry for "Kimmy Gibbler" with the email "kgibbler@ae.us" and a status of "Pass". A pagination control shows "100" and "Showing 1 - 1 of 1".

**1** You are impersonating NormanTEST\_NC12\_LIS@ae.us

✓ Angela Francis was successfully transferred to Rachel's Test Class (September 18, 2024).  
[View Class >](#)

## Convert Class Test

9/18/2024 [Class Notes](#)

**Class Details** **Participants**

1 Participants [Add Participant](#) [Import Using A File](#) [Export List](#)

<input type="checkbox"/>	Name	Blue Card ID	Status	
<input type="checkbox"/>	Kimmy Gibbler kgibbler@ae.us	<input type="text"/>	✓ Pass	<a href="#">...</a>

100 [v](#)

Showing 1 - 1 of 1



# Transfer a Participant

- If there is no option to transfer a participant into another class, this box will appear
  - It contains information on how to create a new class with the exact specifications so that you can successfully transfer that participant into a new class
1. To create a new class, click **'Create New Class'**

## Transfer to Another Class BETA

This participant is unable to be transferred into another class because there is not an active class with the same program requirements. The program name, workbook, additional content, and delivery method must match.

To proceed, create a new class with these specifications.

### Current Class

Name	Blended Seats Retest MD
Program Name	Nonviolent Crisis Intervention®
Workbook	2nd Edition
Additional Content	None
Training Format	Blended

[Cancel](#)

**1** [Create New Class](#)



# Important Notes

- Participants can only be transferred to and from classes that have not been submitted
- Certified Instructors can only transfer participants to classes where they are the primary or secondary instructor
- Business Administrators can transfer participants between all classes listed in their account
- To transfer a participant into another class, they must go into another class that has been created **with the same specifications** as the class they were originally enrolled in
  - **Ex:** NCI 3<sup>rd</sup> Edition Blended → NCI 3<sup>rd</sup> Edition Blended
  - **Ex:** APS 2<sup>nd</sup> Edition Classroom → APS 2<sup>nd</sup> Edition Classroom
- All participants can be transferred to another class as long as their record has not been submitted
- A participant who has completed the course *can* be transferred; however, they will be transferred with course progress remaining at 100%. There will be no option to reset course progress
- You are able to transfer a participant from an unsubmitted class to a submitted class
- If no classes appear for a participant to be transferred into, that means that there is no class created with the exact specifications as the current class the participant is in. You can easily create a new class and transfer the participant in it if needed





# How to Delete a Class



# Sign In to My Account

Go to [www.crisisprevention.com](http://www.crisisprevention.com)

1. Click on **“My Account”** in the upper right corner

Sign in to your account



Introducing Reframing Behavior – Now Available →

## De-escalation training solutions. Customized to your organizational needs.

Join more than 42,000 Certified Instructors and 17 million trained professionals creating safer workplaces worldwide.

Let's Get Started →



# Dashboard

After signing in to your account, you will see the **Dashboard**

1. On the top panel, click on **“Classes”**

**CRISIS PREVENTION INSTITUTE**

**Norman TEST\_NCI3\_US**  
ID: 8401177

**13** Classes this cert cycle  
11 TOTAL

**95** Hours this cert cycle  
75 TOTAL

**51** Participants this cert cycle  
44 TOTAL

### My Certification

Nonviolent Crisis Intervention®  
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**ACTIVE** May 30, 2024 - May 30, 2026

- Pay Annual Membership Fee  
Included with registration
- Complete Instructor Training  
Print your certificate >
- Document Classes  
Recommended 2 per year >

Print ID Card

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- Document Training >

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- Online Modules / Blended Classes >
- Instructor Management >

Explore Training Center

### Order Materials

**ONLINE SEATS & WORKBOOKS**  
View All Workbooks >

View All Products

### Professional Development

- Membership Benefits >
- Certification History >
- My Online Learning >
- Find Training Programs >



# Delete the Class

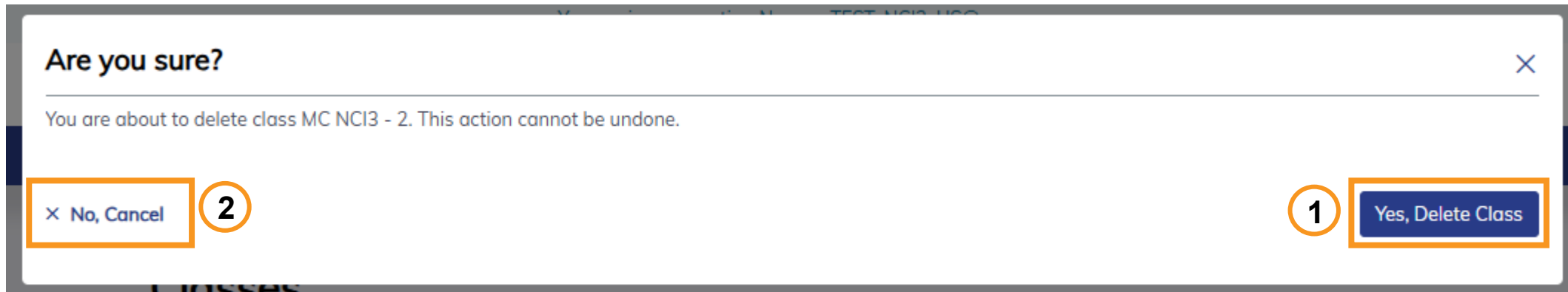
1. Find the class you want to remove and click the ellipses on the right-hand side
2. Click **'Delete Class'**

The screenshot displays the 'Classes' management interface. At the top right, there is a '+ Create Class' button. Below the header, there are tabs for 'Active' and 'Archived'. A 'View Prior CPI Learning History' button is located on the right. A search bar labeled 'SEARCH CLASS NAME' contains 'MC NCI3 - 2' and a 'Go' button. A 'SORT BY' dropdown menu is set to 'Nearest Date'. A 'Show Filters' button is on the left, and a 'Clear Filters' button is on the right. The main content area shows a single class entry for 'MC NCI3 - 2', which is a 'Nonviolent Crisis Intervention®' class. The class details include the date 'November 26, 2024' and the instructor 'Norman TEST\_NCI3\_US' from 'TEST\_Ashley's Educators US'. To the right of the class entry, there is a '0/0 RECORDED' status, a blue ellipsis menu button (circled with a '1'), and a 'Delete Class' button (circled with a '2'). A 'View/Edit Class' button is also visible. At the bottom left, there is a '25' dropdown menu and the text 'Showing 1 - 1 of 1'.



# Delete the Class

- A box will appear asking that you confirm your request to delete
  1. If you want to delete the class, click **'Yes, Delete Class'**
  2. If you changed your mind, click **'No, Cancel'**



# Important Notes

- Classes can only be deleted if they have no participants
- All participants must be transferred to another class or must be removed from the class
- Participants who have completed the online modules at 100% or who have been submitted cannot be removed from the class, therefore the class cannot be deleted





**Thank You!**

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